



# USER GUIDE

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## **About this Document**

This guide provides detailed description about the Employer Group Portal on the Jet Insure platform. The Group Portal acts as a management tool that enables the employers to manage the benefits coverage and possible changes in plans of all employees along with their dependents. The employers will also be able to manage open enrollment periods and renewals with the help of this portal.

This document is designed for the employers who will be using the portal for adding/terminating coverage benefits for their employees as well as dependents, updating plans upon qualifying events, submitting the change requests to the MIT, managing renewals and other similar activities. The guide provides information on different tasks that can be performed through the Group Portal.

# 1 Overview

Once an employer successfully submits an application using the consumer portal or an agent submits the application on behalf of the employer using the sales portal, their request is sent to Members' Insurance Trust (MIT) for enrollment. MIT enrolls the group and the employer can then access their group portal. The group portal is pre-populated with the data entered during the filing of application. An email is generated to the employer regarding successful enrollment of their group and the credentials to login to the portal are shared.

The Group Portal provides the following features:

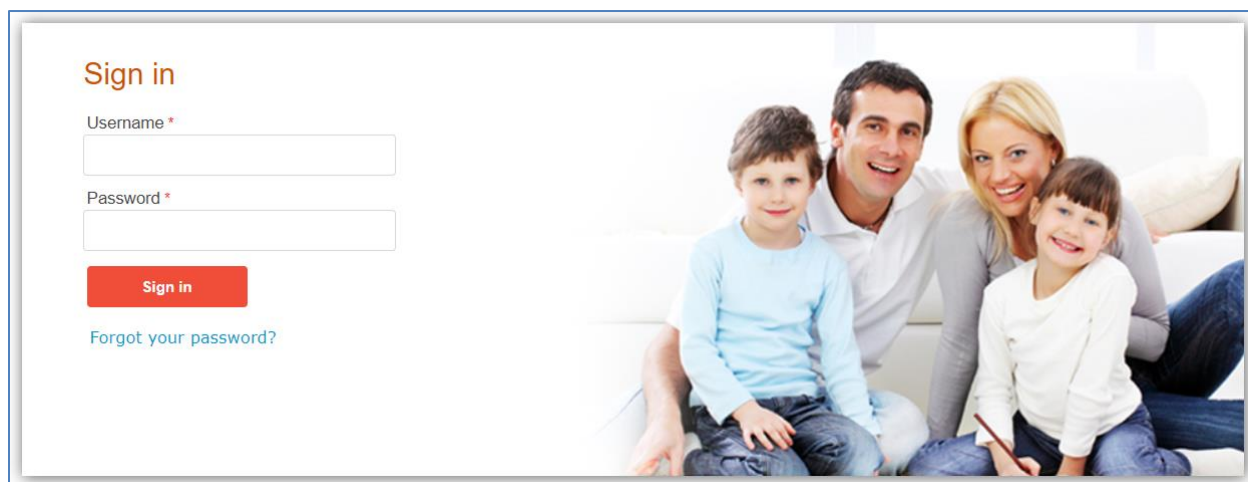
- Allows employer to enroll employees for any of the plans availed by the group during initial application
- Allows employer to update coverage for employees in case of a qualifying event
- Allows employer to terminate coverage of employees whenever needed
- Provides ability to track activities regarding changes in each employee's/dependent's profile and benefits
- Provides ability to track activities regarding changes in employer's profile
- Provides ability to submit all change requests to MIT for approval and updates
- Provides ability to enable open enrollment period for all employees to update plan coverage for next enrollment period

## 1.1 What is needed to access the ‘Group Portal’

To access the portal, you need a Web browser (IE 9 and above) and a computer with an Internet connection.

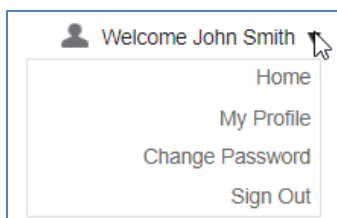
## 1.2 Logging on to the Group Portal

Once a group successfully enrolls with MIT, the link to the portal along with their login credentials are sent to the contact email address. The credentials are the same as those used while filing the application on the consumer portal. The user is prompted to enter their username and password.

A screenshot of the 'Sign in' page for the Group Portal. The page features a white background with a large, smiling family (a man, a woman, and two children) on the right side. On the left, there is a 'Sign in' section with a title in orange. Below the title are two input fields: 'Username \*' and 'Password \*'. A red 'Sign in' button is positioned below the password field. A link 'Forgot your password?' is located below the button.

## 1.3 Login Menu

The login menu is displayed when the mouse pointer is hovered over the logged in user's name displayed in the top right corner of the page.



The following table provides description of the options available in this menu.

Option	Description
Home	Redirects the user to the Landing page of the user logged in i.e. Dashboard
My Profile	Redirects the user to My Profile page (see section 1.4).
Change Password	Redirects the user to the Change Password page (see section 1.5).
Sign Out	Ends the session for the logged in user.

## 1.4 My Profile

This page shows the first name, last name, secret question and secret answer of the logged in user. The user can use this page to modify their profile information.

**User Profile**

First Name \*

Steven

Last Name \*

Smith

E-mail \*

yyyy@yyy.com

Secret Question \*

In what city or town did your mother and father live? ▾



Secret Answer \*

Charleston

Cancel

Save

[Privacy Notice](#) | [Legal Disclaimer](#)  
[www.scmedical.org](#)

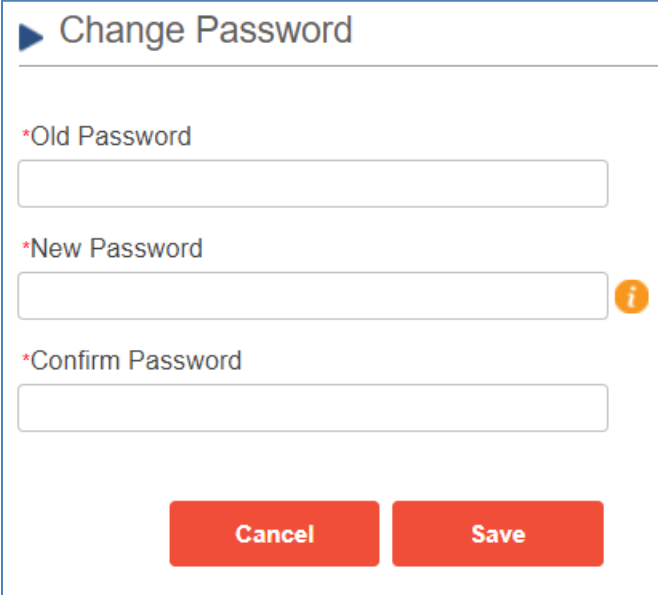
 SCMA Members' Insurance Trust, P.O. Box 11188 Columbia, SC 29211  
 1-800-327-1021

To change the profile information, use the following instructions:

1. Navigate to the **My Profile** page using the Login menu, or using the Profile icon (👤).
2. Make the required changes to your profile.
3. Click **Save** to update profile or click **Cancel** to abort the action.

## 1.5 Change Password

This page allows the user to change the password for their user account.

A screenshot of a 'Change Password' form. The form has a title bar with a blue triangle icon and the text 'Change Password'. Below the title bar, there are three input fields, each preceded by an asterisk: '\*Old Password', '\*New Password', and '\*Confirm Password'. The '\*New Password' field has a small orange information icon to its right. At the bottom of the form, there are two red buttons: 'Cancel' and 'Save'.

To change the password, use the following instructions:

1. Navigate to the **Change Password** page:
2. In the **Old Password** field, type the existing password.
3. In the **New Password** field, type the new password to set for your account. Hovering your cursor over the "i" icon provides information on how to structure your password.
4. In the **Confirm Password** field, retype the new password to confirm it.
5. Click **Save** to change the old password with the new one, or click **Cancel** to abort the action.

## 2 Group Portal Landing Page – Dashboard

The Group Portal landing page is where the employer is redirected after successful login. This page lays out the basic group statistics regarding group participation and enrollment, employer's tasks as well as system generated notifications and most importantly the latest change requests generated using the portal.

The navigation bar assists the user to navigate to their desired page and it mainly consists of following tabs “Dashboard”, “Manage Group”, “Manage Employees”, “Profile & Settings”, “Enrolled Accounts & Classes” and “Help Material”.

Dashboard Manage Group Manage Employees Enrolled Accounts & Classes Help Material				
Current TPA: SCMA				
Participation				
Group Type	Total Employees	Eligible	Covered	Waived
Small	2	2	2	0
				Participation 100%
In-State 0%   Out-of-State 100%				
Enrollment Summary Current Membership: 0 Group Type based on Current Census:				
Plan Name	Employee	Employee & Spouse	Employee & Children	Family
Medical				
Choice Plus I MP	0	0	1	0
HD2000 I - EP	0	0	0	0
HDHP PLAN VII	1	0	0	0
Latest Activities View Comments See All Activities				
Modified On	Activity		Modified By	Status
9/26/2019 7:07 AM	Rule, Beth > Add Dependent - Death		Smith, Steven	New
9/26/2019 6:56 AM	Crawford, Elva > Update Employee - Change Demographics		Smith, Steven	New

- The home page consists of a dashboard view of various modules such as the latest **participation** statistics at the top.
- **Enrollment Summary** for each plan offered, along with its tier, is displayed in a separate dashboard.
- Then another section would contain the **change request log** displaying the recent **activities** carried out by all the members of the portal.

### 2.1 Latest Activities

A maximum of the latest 10 activities/change requests are displayed in the Latest Activities section. When clicking on the “See All Activities”, the user is redirected to the page ‘Submit Changes’ under the Manage Group module. On this page, all the activities carried out by the user itself or other group members will be listed. The activities are listed in a chronological order with the latest on top. Each activity is displayed along with its date and time stamp, affected module reason and the status and user who carried it out.

## 3 Manage Group

The admin user can view or edit the group data, filed at the time of application/proposal, from the “Manage Group” module. Under this module the admin user is able to access the information on “Employer Profile”, “Rates History”, “Eligibility Requirements”, “Contributions” and “Billing & Payments”.

The change requests for employees that are generated using the group portal are submitted to MIT for approval using the “Submit Changes” page.

### 3.1 Employer Profile

When the admin user navigates to **Manage Group → Employer Profile** page, they can view the profile information filed at the time of the application filing. The information is auto-populated into the portal once a group is successfully enrolled.

This screen contains the following information:

- **Group Demographic Information:** Shows group demographic information.
- **Address Information:** Shows the groups Corporate, Billing and mailing address
- **Employer Administrative Information:** Contact information of the Group Administrator
- **Employer Billing Administrative Information:** Shows group’s billing administrative contact information (if applicable)
- **Group Renewal Contact Information:** Shows group’s renewal contact information

## Employer Profile

Commissions Version: **2019 V2**

### Group Demographic Information

Account Number	* Effective Date	Anniversary Date	
<input type="text" value="86773"/>	<input type="text" value="10/1/2019"/> MM/DD/YYYY	<input type="text" value="10/1/2020"/> MM/DD/YYYY	
* Corporate Name			
<input type="text" value="PEDIATRIC SERVICES"/>			
Employer Tax ID	* Type of Ownership	Nature of business	Years in business
<input type="text" value="31-5135135"/>	<input type="text" value="Sole Proprietorship"/>	<input type="text" value="Pediatric"/>	<input type="text" value="2"/>
SIC Code	Affiliation	Affiliation Ref. #	
<input type="text" value="872   ACCOUNTING, AUDITING,"/>	<input type="text" value="--Select from List--"/>	<input type="text"/>	<a href="#">Affiliation Assignment History</a>
Workers Compensation Carrier			
<input type="text" value="321"/>			

### Address Information

	Address Type	Address	State	City	County	Zip code	Same as Corp.
	<input checked="" type="checkbox"/> Corporate	2072 Poe Road	SC	Charleston	Charleston	29403	
	<input checked="" type="checkbox"/> DBA	2072 Poe Road	SC	Charleston	Charleston	29403	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Billing	2072 Poe Road	SC	Charleston	Charleston	29403	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Mailing	2072 Poe Road	SC	Charleston	Charleston	29403	<input type="checkbox"/>

### Renewal Preference

Renewal Preference
<input type="text" value="--Select from List--"/>

### Employer Administrative Information

* First Name	* Last Name	* Phone	Fax
<input type="text" value="MICHELE"/>	<input type="text" value="JOSEPH"/>	<input type="text" value="(651) 313-1315"/>	<input type="text"/>
* Email			
<input type="text" value="Michele@mail.com"/>			

### Employer Billing Administrative Information

<input type="checkbox"/> Email Invoice
<input checked="" type="checkbox"/> Same as Employer Administrative Information

### Group Renewal Contact Information

First Name	Last Name	Phone	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email			
<input type="text"/>			

Back

Save

## 3.2 Notifications

[Dashboard](#) [Manage Group](#) [Manage Employees](#) [Enrolled Accounts & Classes](#) [Help Material](#)

Correspondence Queue

DCN

201909471510

Submitted By

All

Product Type

Group Health Enrolled Accour

Type

All

Submitted Date From

MM/DD/YYYY

Submitted Date To

MM/DD/YYYY

Sent Date From

MM/DD/YYYY

Sent Date To

MM/DD/YYYY

Mode

All

Search

Reset

Back

Search Results

Rows / Page 10 Maximum Rows 100

DCN	Title	Type	Source	Submitted By	Sent To	Submitted On	Processed On
-----	-------	------	--------	--------------	---------	--------------	--------------

This functionality holds the records for all the corresponding done with the employees. Notification types like Phone, Fax, Email, Print, Letter, Postal Mail, and SMS are all valid notification that can be recorded. Once recorded, any record for previous Notifications is available when search is performed. User can perform search on different criteria like Submitted Date from, Sent Date from, Submitted by, DCN number or Type of Notification.

## 3.3 Billing Invoices

[Dashboard](#) [Manage Group](#) [Manage Employees](#) [Enrolled Accounts & Classes](#) [Help Material](#)

Invoice Search

Billing Period

All

Invoice Number

Status

All

Search

Financial Dashboard

Invoice Number	Billing Period ▲	Status	Current Charges	Past Due Charges	Total Charges	Due Date	View PDF
----------------	------------------	--------	-----------------	------------------	---------------	----------	----------

No record found.

This functionality helps the user in searching for Invoices that has been billed. On access of this frame, from Billing Period user can select the dates within which the searched invoice might fall, and perform search. If user knows a particular invoice number, he/she can enter the number of invoice and search for it.

### 3.4 Offered Plan and Rates

When the user navigates to **Manage Group → Offered Plans and Rate** page, the user can view rates of selected plans selected during application filling. The information is auto-populated into the portal once a group is successfully enrolled.

[Dashboard](#) [Manage Group](#) [Manage Employees](#) [Enrolled Accounts & Classes](#) [Help Material](#)

Current Offered Plans and Rates

**i** Below are the plans offered by your group. The medical and prescription rates are inclusive of the ACA fees. You will need to add Medical, Prescription and Dental (if applicable) amounts in order to get the total monthly health care fees.

Medical

Plan Name	Coverage Type	Rate
Choice Plus I MP	EE	\$569.00
Choice Plus I MP	ES	\$1285.93
Choice Plus I MP	EC	\$874.55
Choice Plus I MP	F	\$1479.96
HD2000 I - EP	EE	\$467.05
HD2000 I - EP	ES	\$1055.53
HD2000 I - EP	EC	\$717.86
HD2000 I - EP	F	\$1214.80
HDHP PLAN VII	EE	\$330.13
HDHP PLAN VII	ES	\$746.09
HDHP PLAN VII	EC	\$507.41
HDHP PLAN VII	F	\$858.67

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### 3.5 Eligibility Requirements

When the admin user navigates to **Manage Group → Eligibility Requirements** page, he/she can view the latest participation statistics of the group. The data is auto-populated into the portal once a group is successfully enrolled.

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### Eligibility Requirements

All permanent full time employees working atleast a minimum of 24 hours per week are eligible.

\* Hourly requirement

\* Total # of Full-Time and Part-Time employees

Total number of full time eligible employees

Total number of eligible employees enrolling

Total number of eligible employees waiving due to other coverage

Participation Calculation (Line 4 + Line 5 / Line 3)  %

Waived Employees

Back
Save

## 3.6 Billing & Payments

When the admin user navigates to **Manage Group** → **Billing & Payments** page, they can view and edit the billing & payments information entered at the time of application filing. Admin user may select to add different bank account for different institution.

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Help Material

### Billing and Payment

Payment Method ☐ Check ☒ Bank

\* Bank Routing Number

\* Bank Account Number

\* Institution Name

\* Account Type ☐ Checking ☐ Saving

Back
Save

## 3.7 Submit Changes

When the admin user navigates to **Manage Group** → **Submit Changes** page, he/she can view the list of all activities carried out by the group users.

These activities are listed in a chronological order with the latest on top grouped under each employee for whom the change request has been initiated. In case the group admin made any changes in the Manage Group pages, the change requests for the group are always listed at the top of the activities log. User is able to see the date & time on which the change was initiated along with the module and reason of the change, the user who initiated the change as well as the change request's status. These statuses are as follows:

- **New:** The change requests bearing status “New” indicates that these are saved in the portal however they are yet to be submitted to MIT for approval.
- **In Process:** The change requests that are marked “In Process” are the changes that are being assessed by the system before submitting them to MIT. The system evaluates whether a change request can be approved immediately or needs to be submitted to MIT for approval.
- **Approved:** The changes that are marked as “Approved” are the requests that have been approved by MIT and are in effect.
- **Submitted:** The change requests with status “Submitted” mean that these requests have been submitted however they are yet to be approved by MIT.

Dashboard Manage Group Manage Employees Enrolled Accounts & Classes Help Material

### Activities

First Name Last Name Member ID SSN Search

*\*Change(s) processed by internal staff will be auto-approved. You will be able to submit new changes after changes in processing status are completed.*

Modified On	Activity	Modified By	Coverage Status	Activity Status	Action
9/26/2019 6:56:33 AM	Crawford, Elva > Update Employee - Change Demographics	Steven Smith	Covered	New	

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### 3.7.1 Search Change Request of a Particular Employee

User can search a change request set for an employee by specifying the employee's first name or last name or member ID or SSN. On specifying any of these filters and clicking the **Search button**, the change set, if any, is displayed.

### 3.7.2 View Details

For any change request when you click on the **Activity button**, you see the details of the change request as shown below.

Submit Changes

Activity : Crawford, Elva > Update Employee - Change Demographics

Field	Updated Value	Previous Value
Address	255 W Poplar St	1192 Norma Lane
County	Charleston	Chareston
Work Phone	(545) 641-1616	5456411616
Mailing County	Charleston	Chareston

### 3.7.3 Submit Changes

1. Navigate to **Submit Changes** page.
2. Select the employees for which the changes are to be submitted.
3. Click the **Submit** button.
4. The system runs the defined business rules to evaluate the changes being sent, once evaluation is completed, the changes are submitted to MIT.

**Note:** Once a change request has been submitted for an employee, no further actions can be performed for that employee. Once MIT sends its approval, the change requests will be removed from the activities log and further actions can then be performed for that employee. However, the group administrator can recall a change request to make any corrections. This process is described in the section below.

#### 3.7.3.1 Recall Changes

Once a change request for an employee has been submitted, no further action can be performed for that employee. However, the group administrator can send a recall request to make any corrections for an employee. Once the recall request is made for an employee, the group admin can make further changes and re-submit them only after the MIT team releases the change request for further edits. The following steps describe the 'Recall' functionality:

1. Navigate to **Submit Changes** page.
2. The **Recall** button will be available against the changes that have been submitted to MIT and are awaiting approval.
3. On clicking the **“Recall”** button, a request to release the change set is forwarded to MIT. MIT team releases the change request.
4. Once released, the change request set is ready for editing and re-submission for the admin user.

### 3.8 Documents

When the admin user navigates to **Manage Group >> Documents** page, he/she can view list of attached documents (group/employee level both). Documents added at the time of group enrollment will be displayed in this section.

New documents can also be attached at group level from this page, however documents at employee level can be attached while editing employee profile.

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Documents

Group Documents
Download Selected | Download All | + Add New Document

Document Type: 
Document Name:

Added From:  MM/DD/YYYY
Added To:  MM/DD/YYYY

Search

<input type="checkbox"/>	Document Name	Type	Created By	Created Date
<input type="checkbox"/>	SCMA_ApplicationProposalReport_2019_09_19_07_12_01_886.pdf	SG - Proposal		09/19/2019

## 4 Manage Employees

The manage employee module is used by the admin user to manage employees enrolled with MIT via the group policy. The admin user can add new employees or edit or terminate existing employees using this module. Dependents can also be added or terminated. Plan changes can also be performed if a qualifying event occurs.

### 4.1 View/Edit Employees

All the employees enrolled in the initial enrollment are pre populated in a grid on the **View Roster** page. The employees are listed alphabetically along with their Member ID, SSN, coverage status and coverage period.

User can apply sorting on any column by simply clicking on the label of that column.

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### Employee Roster

Last Name

First Name

Member ID

SSN

Status  
All ▼

Coverage Type  
All ▼

Search

[+ Add Employee](#) | [Print Member Summary](#) | [Export Census Data](#)

Member ID	Employee Name ▲	Coverage Type	SSN	Status	Selected Plans	Effective Date	Termination Date	
0129493	<a href="#">Crawford, Elva</a>	Employee	***-**-1651	Covered	HDHP PLAN VII	10/01/2019	N/A	🟢
0129494	<a href="#">Rule, Martha</a>	Employee	***-**-1318	Covered	Choice Plus I MP	10/01/2019	N/A	🟢

Showing 1 to 10 of 2 rows

#### 4.1.1 Search Employee

The admin user can search for any existing employee record by specifying any of the filters given at the top i.e. First Name, Last Name, SSN, Member ID and Coverage Status.

#### 4.1.2 Add an Employee/Dependent

1. The admin user can enroll a new employee by either navigating to the **Add Employee** page under the module Employee Roster or by clicking the “Add Employee” button on the **View Roster** page.
2. The Employee Profile page is opened where the user needs to enter the required data. Benefit Election can be done from Coverage section.

## Employee Profile

Rule, Martha - 0129494

Coverage Start Date <b>10/1/2019</b>	Coverage Status <b>Covered</b>	Coverage Type <b>Employee</b>	Health Plan <b>Choice Plus I MP</b>	Effective Date <b>10/1/2019</b>	Termination Date <b>N/A</b>
Date of Birth <b>01/01/2000</b>	SSN <b>633161318</b>	Marital Status <b>Single</b>	Gender <b>Male</b>	Email <b>Martha@mail.com</b>	

### Contact Information & Mailing Address

Address <b>211 Terry Lane</b>	City <b>Charleston</b>	State <b>SC</b>	Zip Code <b>29403</b>	County <b>Chaleston</b>
----------------------------------	---------------------------	--------------------	--------------------------	----------------------------

## Edit Employee

### Demographics

[Edit Mailing Address](#) | [Edit Profile](#)

* Last Name <input type="text" value="Rule"/>	* First Name <input type="text" value="Martha"/>	Middle Initial <input type="text"/>	Suffix <input type="text"/>
* Gender <input type="text" value="Male"/>	* Date of Birth <input type="text" value="1/1/2000"/> MM/DD/YYYY	* SSN <input type="text" value="633161318"/>	Coverage Type <input type="text" value="Employee"/>
* Employee Status <input type="text" value="Existing Member"/>	* Coverage Status <input type="text" value="Covered"/>	Hire Date <input type="text" value="1/1/2005"/> MM/DD/YYYY	* Marital Status <input type="text" value="Single"/>
* Class <input type="text" value="EVERYONE"/>	* Average Working Hours <input type="text" value="40"/>	* Coverage Start Date <input type="text" value="10/1/2019"/> MM/DD/YYYY	Division <input type="text" value="--Select from List--"/>

### ID Card Request

ID Card Request ☐

### Contact Information

Home Phone <input type="text"/>	Work Phone <input type="text"/>	Mobile Phone <input type="text"/>	Email <input type="text" value="Martha@mail.com"/>
------------------------------------	------------------------------------	--------------------------------------	---

### Address Information

	Address Type	Address	State	City	County	Zip code	Same as Contact
<input checked="" type="checkbox"/>	Contact	211 Terry Lane	SC	Charleston	Chaleston	29403	
<input checked="" type="checkbox"/>	Mailing	211 Terry Lane	SC	Charleston	Chaleston	29403	<input type="checkbox"/>

### Current and Previous Coverage

Will you be maintaining a secondary health coverage for you, your spouse and/or your dependent children, if you enroll in this health plan? ☐ Yes ☒ No

## Coverage

### Medical

	Plan	Annual Deductible	Life Time	Out-of-Pocket Limit	Monthly Premium
▶	Choice Plus I MP	None   Not Covered	Unlimited   Not Covered	\$4,000/\$8,000 (Embedded)   Not Covered	\$569.00

## Dependent(s)

[+ Add Dependent](#)

Member ID	Name	Gender	Date of Birth	Age	Relation	Coverage Status	Effective Date	Termination Date
No dependents exist.								

Back

Save

3. The user can add dependent(s) of the employee being enrolled by clicking the **“Add Dependent”** button. A pull-down section will appear to add dependent.
  - Clicking on the **“Save”** button, dependent will be added and appear in Dependent(s) grid.
  - Clicking on the **“Cancel”** button will cancel the operation and close Dependent Detail section.
  - Same process can be repeated in case there is the need to **add multiple dependents**.

Dependent(s)

Member ID

Name

Gender

Date of Birth

Age

Relation

Coverage Status

Effective Date

Termination Date

No dependents exist.

+ Add Dependent

Dependent Detail

Demographics

\* Last Name

Rule

\* First Name

Middle Initial

Suffix

\* Gender

--Select from List--

\* Date of Birth

MM/DD/YYYY

\* SSN

\* Relation

--Select from List--

\* Marital Status

--Select from List--

\* Coverage Status

Covered

Handicapped

Contact Information

Same as Member

Home Phone

Work Phone

Mobile Phone

Email

Address Information

	Address Type	Address	State	City	County	Zip code	Same as Contact
	Contact						
	Mailing						<div></div>

Reason

\* Reason

--Select from List--

\* Event Date

MM/DD/YYYY

\* Coverage Start Date

MM/DD/YYYY

Current and Previous Coverage

\* Will you be maintaining a secondary health coverage for your spouse and/or your dependent children, if you enroll in this health plan?

Yes

No

OK

Cancel

The information will be saved once you click the Save button.

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Save

- Once employee/dependent information is added, user will click on the “**Next**” button.

5. The next and the final step of enrollment is the **Acceptance & Signatures** page.
6. The user enters the required information and clicks the **“Finish”** button to complete the enrollment of a new employee along with the dependents (if applicable).
7. The change request is queued in the Submit Changes page from where the admin can submit the request to MIT for enrollment.

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Acceptance & Signature  
Rule, Martha - 0129494

Please provide any additional comments or notes related to this request in the space below

Steven Smith - Electronic Signature

Acknowledgement

☐ \* A signature from the employee has been received. I acknowledge the receipt of the signature and provide my signature as testimony to this fact.

\* Date of employee signature

9/26/2019

MM/DD/YYYY

Please enter your name in the spaces below to electronically sign your application.

First Name \*

MI

Last Name \*

Please retype your name in the spaces below to confirm your electronic signature.

First Name \*

MI

Last Name \*

Back
Finish

### 4.1.3 Edit an existing Employee/Dependent

1. Navigate to the **View Roster** page.
2. User can either search for the required employee by specifying any of the search filters or simply browse through the roster to find the particular employee. By clicking the name of the employee, user is redirected to that employee’s profile page.
3. On the employee’s profile, a link **“Edit Profile”** is given. By clicking the link, the data becomes editable and the user can make any changes in the demographics of the employee. A reason must be given for these changes using the **Reason** dropdown.
4. Similarly, for each dependent a link **View/Edit** is given. Clicking the link opens the dependent’s profile where the user can make necessary changes.

**Note:** For each employee, the coverage details are shown on the profile page in the grid under the heading **Coverage**. The current coverage is always displayed at the top followed by the previous plan, if any.

Furthermore, user will not be allowed to make any changes in a profile if that employee's change request is pending approval or the employee has the employment status "**Terminated**".

Also, the **Edit Profile** link only allows changes in the employee's profile. The plan cannot be changed unless a qualifying event is specified, or the Open Enrollment period is in effect.

## Employee Profile

Add Employee



### Demographics

* Last Name	* First Name	Middle Initial	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
* Gender	* Date of Birth	* SSN	Coverage Type
--Select from List--	<input type="text"/> MM/DD/YYYY	<input type="text"/>	<input type="text"/>
* Employee Status	* Coverage Status	* Hire Date	* Marital Status
New Hire	Covered	<input type="text"/> MM/DD/YYYY	--Select from List--
* Class	* Average Working Hours	* Coverage Start Date	Division
--Select from List--	<input type="text"/>	<input type="text"/> MM/DD/YYYY	--Select from List--

### Contact Information

Home Phone	Work Phone	Mobile Phone	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Address Information

	Address Type	Address	State	City	County	Zip code	Same as Contact
	Contact						
	Mailing						<input type="checkbox"/>

### Reason

\* Reason

Add Employee-New Hire

### Current and Previous Coverage

\* Will you be maintaining a secondary health coverage for you, your spouse and/or your dependent children, if you enroll in this health plan? ☐ Yes ☐ No

Dependent(s)



[+ Add Dependent](#)

Member ID	Name	Gender	Date of Birth	Age	Relation	Coverage Status	Effective Date	Termination Date
No dependents exist.								

Back

Save

Next

#### 4.1.4 Terminate an Employee/Dependent

1. Navigate to the **View Roster** page.
2. User can either search for the required employee by specifying any of the search filters or simply browse through the roster to find the particular employee. By clicking the name of the employee, user is redirected to that employee's profile page.
3. The user clicks on the **"Edit Profile"** link in order to make the profile editable.
4. Once profile is editable, change the **Employee Status** to **"Terminated"** and select the **Coverage Status** as either **"COBRA"** or **"Terminated"**, whichever is required, and select reason of termination from the **Reason** dropdown.
5. In order to terminate a dependent, click on the **View/Edit** link of that dependent and change their **Coverage Status** to **"Terminated"** and select a reason from the **Reason** dropdown.
6. The termination request is queued in the Submit Changes page from where the user can forward it to MIT by selecting that change set and clicking the Submit button.

#### 4.1.5 Qualifying events for plan change

In order to change an employee's plan, a qualifying event must be recorded i.e. adding or terminating a dependent as per reasons such as marriage, divorce and death etc.

User can add or terminate a dependent, as per the requirement of the qualifying event, on the employee's profile. Once the dependent details have been added or the dependent has been terminated, the user clicks the **Next** button to fill the Acceptance & Signature page details and press the **Finish** button to complete the change request.

#### 4.1.6 Export Census Data

In order to export the complete list of enrolled employees into an excel format, click the link **"Export Census Data"**. Doing so, the census information of all enrolled employees along with their dependents are exported to a spreadsheet in a standard format.

#### 4.1.7 Print Benefits Summary

In order to export the details of each employee's coverage along with their dependents, user can click the link **"Print Benefits Summary"**. Doing so, a benefit summary spreadsheet is generated.

#### 4.1.8 Reinstate Member

1. Navigate to the **View Roster** page.
2. User can either search for the required employee by specifying any of the search filters or simply browse through the roster to find the particular employee. By clicking the name of the employee, user is redirected to that employee's profile page.
3. The user clicks on the **"Edit Profile"** link in order to make the profile editable.
4. Once profile is editable, change the **Employee Status** to **"Covered"**
5. The re-instatement request is queued in the Submit Changes page from where the user can forward it to MIT by selecting that change set and clicking the Submit button.

## 4.2 Enrollment History

1. Navigate to **Enrollment History** page under the Manage Employee module.
2. User needs to specify the employee name in order to view the complete history of change requests sent for a particular employee. User can further filter the search results by applying a time period. If any change request exists for that employee for the specified time period, those changes will be listed.

[Dashboard](#) [Manage Group](#) [Manage Employees](#) [Enrolled Accounts & Classes](#) [Help Material](#)

### Enrollment History

Type

Employee Name

Date From

Date To

Search

Modified On	Activity	Modified By	Status
Martha Rule 9/26/2019 7:07:22 AM	Beth Rule > Death	Steven Smith	New
Elva Crawford 9/26/2019 6:56:33 AM	Elva Crawford > Change Demographics	Steven Smith	New

## 4.3 Leave of Absence Request

1. Navigate to the **LOA Request** page under the Manage Employee module.
2. The user will then be redirected to the Employee leave of Absence search screen, where the user is able to search for employees who have requested a leave of absence as shown in the screen shot below

Employees Leave of Absence

First Name

Last Name

Search

Add New

Search Results

Rows / Page  Maximum Rows

	Name	LOA Begin Date	Est. Return Date	Returned Actual Date	Processed On	Processed By
<a href="#">View/Edit</a>	MELISSA COOK	10/03/2019	10/02/2019	10/31/2019	10/6/2019 6:30:00 PM	SCMA MIT
<a href="#">View/Edit</a>	ANN NUNNAMAKER	10/09/2019	10/23/2019	10/10/2019	10/6/2019 6:30:00 PM	SCMA MIT
<a href="#">View/Edit</a>	John Smith	10/01/2020	10/03/2019	10/03/2019	10/6/2019 6:30:00 PM	SCMA MIT

3. Clicking on the **Add New** button will open an input screen where the user would have to provide the following information:
  - a. Employee name which the user has to select from the dropdown

- b. LOA Begin Date
  - c. LOA Estimated Return Date
  - d. Employee Returned Work Actual Date
4. Clicking on the save button will save the information and display it in the grid as shown above

Employees Leave of Absence

\* Employee

--Select from List--

\* LOA Begin Date

MM/DD/YYYY

\* LOA Estimated Return Date

MM/DD/YYYY

Employee Returned Work Actual Date

MM/DD/YYYY

Save

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## 5 Enrolled Accounts and Classes

On this screen the user can view and edit the existing classes configured for the group during the application process. Clicking on the **view/edit** link will display the following information.

1. The Class Name
2. Description
3. Employer Contribution
4. Employer Waiting Period

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Group Classes

Name

Active
All

Search

Search Results

Rows / Page
10
Maximum Rows
100

	Name	Rate Type	Waiting Period	Waiting Days	Re-Hire	Rehire Waiting Days	Active
View/Edit	EVERYONE	Percent	First of Month After Waiting	None	No		Active

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### Class Definition

*i* Class is associated with employee(s) its name and description cannot be updated.

#### Employer Class

\* Class Name

EVERYONE

\* Description

EVERYONE

Active
☒

#### Employer Contribution

\* Contribution Type
☒ Percent
☐ Flat Rate

\* Employee (EE)

0 %

\* Employee & Spouse (ES)

0 %

\* Employee & Children (EC)

0 %

\* Family (FAM)

0 %

#### Employer Waiting Period

\* Employee Waiting Period

First of Month After Waiting

\* Days

None

\* Rehires - Treat as new hires
☐ Yes
☒ No

Waive waiting period if rehired within

--Select from List--

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## 6 Help Material

User can view the help material uploaded in the JET application. User can also search for a document by specifying the document title in the search bar.