



Simply Benefits

Partnership

WealthCo.

Branding



Colours

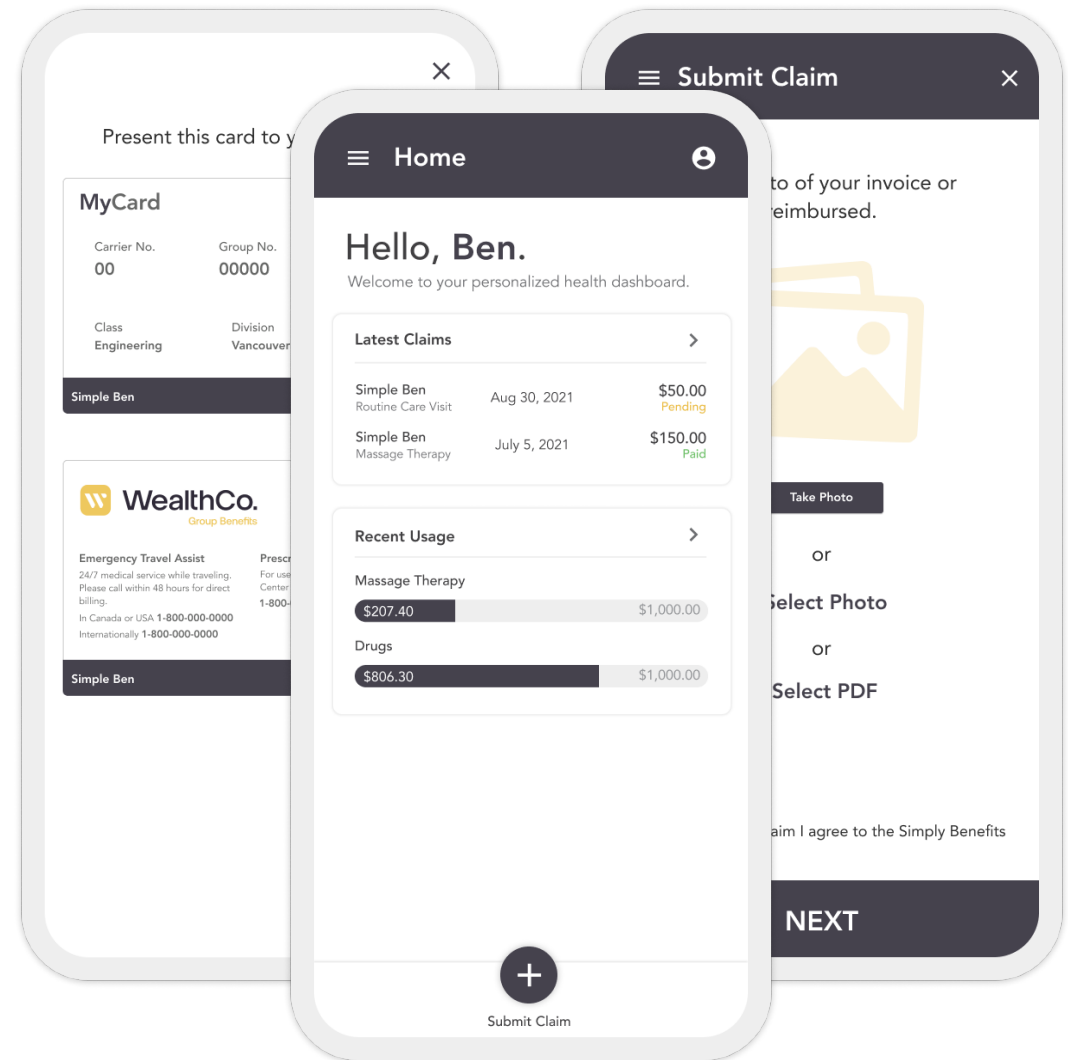
White label businesses will be able to customize their dashboard with their top three selected brand colours.

Logos



Logos and other brand assets will be added to each dashboard page as a watermark, and on the top navigation bar as well as the drug card.

Mobile App



Employee

Dashboard

The employee dashboard offers easy access to our member's favourite features. Here, employees can quickly navigate to the part of the platform that they need. Brand colours and logos are displayed throughout.

The desktop dashboard features a top navigation bar with the WealthCo. logo, a notification bell, a settings gear, and a user profile icon labeled 'SB'. A left sidebar contains a navigation menu with items: Dashboard, Benefits Card, Spending Accounts, Claims, My Usage, Plan Coverage, Prescription Delivery, Resources, and Support. The main content area is titled 'Dashboard' and greets the user with 'Good Afternoon, Ben.' Below this is a grid of six interactive cards: 'Claims' (Make a claim or view claims history), 'Spending Accounts' (See your health and lifestyle account balances), 'My Usage' (View your usage and remaining balances), 'Coverage' (View a breakdown of your plan coverage), 'Benefits Card' (View your Benefits Card), and 'My Account' (View and manage account details). A large yellow hand icon is visible at the bottom right of the dashboard area.

The mobile dashboard features a dark header with a 'Home' title and a user profile icon. It greets the user with 'Hello, Ben.' and provides a 'Submit Claim' button at the bottom. The main content area is divided into two sections: 'Latest Claims' and 'Recent Usage'. The 'Latest Claims' section displays a table of recent claims:

Claim Description	Date	Amount	Status
Simple Ben Routine Care Visit	Aug 30, 2021	\$50.00	Pending
Simple Ben Massage Therapy	July 5, 2021	\$150.00	Paid

The 'Recent Usage' section shows progress bars for 'Massage Therapy' and 'Drugs', both with a current usage of \$207.40 and \$806.30 respectively, against a \$1,000.00 limit.



Employee

Claim History

Employees can easily monitor their claims history. Charts are displayed to show how much has been claimed. They'll also be able to view recent claims and check their status to see if they have been approved and paid.

The desktop interface features a top navigation bar with the WealthCo. Group Benefits logo, a notification bell, a settings gear, and a user profile icon labeled 'SB'. A left sidebar contains navigation links: Dashboard, Benefits Card, Spending Accounts, Claims, My Usage, Plan Coverage, Prescription Delivery, Resources, and Support. The main content area is titled 'Claims History' and includes a 'Submit Claim' button. A large circular progress indicator shows 'CLAIMED \$1,434.00 Submitted'. Below this is a 'Total Claims' table with columns for Type, Date, Identifier, Submitted, Status, and Claimed.

Type	Date	Identifier	Submitted	Status	Claimed
Ben Physiotherapy	Jan 1, 2021	0000000	\$64.98	Claimed	\$64.98
Ben Physiotherapy	Dec 13, 2020	1111111	\$64.98	Claimed	\$64.98
Ben Physiotherapy	Nov 30, 2020	9999999	\$64.98	Claimed	\$64.98
Ben Physiotherapy	Oct 14, 2020	2222222	\$64.98	Claimed	\$64.98

The mobile interface shows a 'Claims' header with a menu icon and a user profile icon. Below is a 'Claims History' section with a summary card showing 'Amount Claimed \$210.32' and 'Amount Submitted \$600.00' with a progress bar. A 'Recent Claims' table follows, listing claim details such as Type, Date Submitted, and Amount Claimed with status indicators (Pending, Approved, Paid, Declined). A 'Submit Claim' button with a plus icon is at the bottom.

Recent Claims	Date Submitted	Amount Claimed
Simple Ben Routine Care Visit	March 30, 2021	\$50.00 Pending
Simple Ben Acupuncturist	Feb 30, 2021	\$150.00 Approved
Simple Ben Massage Therapy	Feb 15, 2021	\$200.00 Paid
Simple Ben Drugs	January 20, 2021	\$0.00 Declined
Simple Sally Routine Care Visit	January 10, 2021	\$50.00 Paid
Simple Ben Routine Care Visit	Nov 30, 2020	\$50.00 Paid
Simple Ben Massage Therapy	October 10, 2020	\$150.00 Paid
Simple Sally Prescription Drugs	Aug 30, 2020	\$60.00 Paid



Employee

Digital Drug Card

Employees can quickly access their custom Digital Drug Card to present to their pharmacist. They can also download a printable version that they can print out and keep in their wallet.

The screenshot shows the WealthCo Group Benefits portal. The top left features the WealthCo logo and the text "Group Benefits". A user profile for "Simple Ben" (SB) is shown with the email "simplyben@gmail.com". A navigation menu on the left includes: Dashboard, Benefits Card, Spending Accounts, Claims, My Usage, Plan Coverage, Prescription Delivery, Resources, and Support. The main content area is titled "Benefits Card" and includes a "DOWNLOADABLE PRINTABLE VERSION" link. Two cards are displayed: a "MyCard" and a "Digital Drug Card".

Carrier No.	Group No.	Certificate No.
00	00000	000000
Class	Division	assurance
Engineering	Vancouver	

Emergency Travel Assist	Prescription Drug Card
24/7 medical service while traveling. Please call within 48 hours for direct billing.	For use in Canada only. Pharmacy Call Center Services provided by Assure.
In Canada or USA 1-800-000-0000 Internationally 1-800-000-0000	1-800-000-0000

The mobile app screenshot shows the digital drug card and MyCard. The top text says "Present this card to your pharmacist". Below is the MyCard with the same data as the desktop version. The bottom section shows the Digital Drug Card with the same data as the desktop version.

Carrier No.	Group No.	Certificate No.
00	00000	000000
Class	Division	assurance
Engineering	Vancouver	

Emergency Travel Assist	Prescription Drug Card
24/7 medical service while traveling. Please call within 48 hours for direct billing.	For use in Canada only. Pharmacy Call Center Services provided by Assure.
In Canada or USA 1-800-000-0000 Internationally 1-800-000-0000	1-800-000-0000



Employee

My Usage

Employees can review the usage for both themselves and their dependents on this dashboard. Here, they'll find information about where their benefits are being spent, how much they have left, and their usage from the previous year.

The desktop view of the 'My Usage' dashboard features a top navigation bar with the WealthCo. Group Benefits logo, a notification bell, a settings gear, and a user profile icon labeled 'SB'. A left sidebar contains a navigation menu with items: Dashboard, Benefits Card, Spending Accounts, Claims, My Usage (highlighted), Plan Coverage, Prescription Delivery, Resources, and Support. The main content area is titled 'My Usage' and includes a 'View Last Year' button. Below the title are two tabs: 'My Usage' (selected) and 'Simple Sally'. The dashboard displays usage for 'Simple Ben' (simplyben@gmail.com) across several categories, each with a progress bar showing current usage and a total limit. The categories and their usage are: Dental (Basic & Major Combined Maximum \$2,000.00, \$2,000.00 Remaining, 1 Routine Care Visit), Orthodontics (\$2,500.00 / \$2,500.00), Basic Service (Endodontics, Periodontics, Routine Care (Visit and Treatment)) (\$0 / \$2,000.00), Major Services (Bridge Work, Crowns, Denture Repair, Dentures) (\$0 / \$2,000.00), Paramedicals (Basic & Major Combined Maximum \$2,000.00, \$2,000.00 Remaining), Acupuncturist (\$875.43 / \$1,500.00), Speech Therapy (\$0 / \$1,500.00), Social Worker (\$0 / \$1,500.00), and Registered Dietician (\$204.54 / \$1,500.00).

The mobile view of the 'My Usage' dashboard is shown in a rounded rectangle. It features a dark header with a hamburger menu, the title 'My Usage', and a user profile icon. Below the header are two tabs: 'Your Usage' (selected) and 'Simple Sally'. The main content area displays usage for 'Simple Ben' across several categories, each with a progress bar showing current usage and a total limit. The categories and their usage are: Dental (Combined Max \$2,000.00 | \$1,500.00 Remaining, 1 Routine Care Visit), Basic Service (Endodontics, Periodontics, Routine Care (Visit and Treatment)) (\$157.80 / \$1,000.00), Orthodontics (\$0 / \$1,000.00), Major Services (Bridge Work, Crowns, Denture Repair, Dentures) (\$523.00 / \$1,500.00), Paramedicals (Combined Max \$2,000.00 | \$1,500.00 Remaining), Speech Therapy (\$0 / \$1,000.00), Social Worker (\$0 / \$1,000.00), and Registered Dietician (\$207.40 / \$1,000.00).



Employee

Plan Coverage

Say goodbye to paper booklets, employees can now quickly look up details about their coverage by reading the details in each section, or using our AI-powered lookup function.

The screenshot shows the 'My Plan Coverage' page on the WealthCo Group Benefits portal. The user is identified as Simple Ben (simplyben@gmail.com). A search bar at the top of the main content area contains the text 'Ask away, we'll answer.' Below this is a grid of coverage categories, each with a plus sign to expand it. The categories include Life Insurance, Dental, Vision, Accidental Death & Dismemberment, Drugs, Out Of Province or Country, Dependent Life, Paramedicals, Employee Assistance Program, Long Term Disability, Major Medical, and Spending Accounts. The Employee Assistance Program section is expanded, showing details about the confidential program and links to an EFAP Guide and HumanaCare details.

Life Insurance	+	Dependent Life	+
Dental	+	Paramedicals	+
Vision	+	Employee Assistance Program	-
Accidental Death & Dismemberment	+	You are enrolled in the completely confidential Employee and Family Assistance Program (HumanaCare). See the links below for details.	
Drugs	+	Medical Second Opinion Benefits Included EFAP Guide HumanaCare Details Call HumanaCare: 1-800-000-0000	
Out Of Province or Country	+	Long Term Disability	+
		Major Medical	+
		Spending Accounts	+

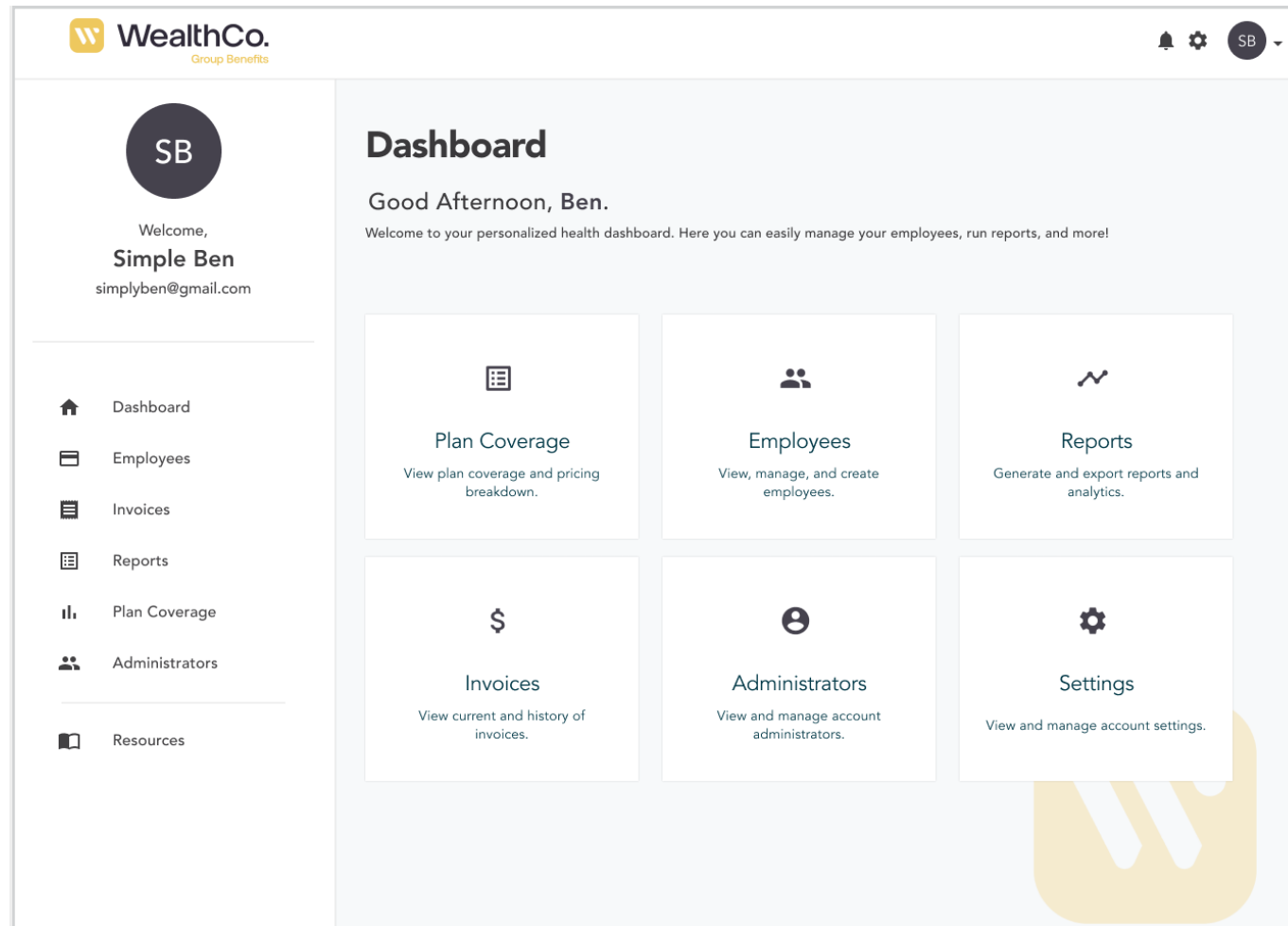
The screenshot shows the mobile app interface for 'Coverage'. It features a search bar with the text 'coverage for braces' and a magnifying glass icon. Below the search bar is a section titled 'Your Plan' which lists various coverage categories with dropdown arrows: Life Insurance, AD&D, Dental, Drugs, Paramedicals, and Major Medical.



Employer

Dashboard

Employers and admins have their own unique dashboard that gives them quick access to view employees, digital reports, digital invoices and more. The advisor brokerage's logo and colors are displayed throughout.



Employer

Employees

Employers or admins can review all of their employees in one simple place. They can search employees by name, filter by division and quickly notify employees by push notification or email. They can also quickly edit employee information or add new employees.

The screenshot shows the 'Employees' management page in the WealthCo Group Benefits system. The interface includes a sidebar with navigation options, a top navigation bar with user profile and settings, and a main content area with a search bar and a table of employees.

Header: WealthCo Group Benefits, User: SB

Left Sidebar:

- Dashboard
- Employees
- Invoices
- Reports
- Plan Coverage
- Administrators
- Resources

Main Content:

Employees

Search

NOTIFY EMPLOYEES | VIEW EMPLOYEE CHANGES | VIEW PENDING CHANGES | SALARY UPDATE | NEW MEMBER

Filter and Sort:

- Class: Class A, Class B, Class C, Class D
- Status: [Dropdown]
- Waived Status: [Dropdown]
- Hire Date: [Dropdown]
- Buttons: Reset Filters, Apply Filters

Name	Division	Class	Status	
JS John Smith johnsmith@gmail.com	Kelowna	A	Live	⋮
JJ John Jacob johnjacob@gmail.com	Vancouver	A	Live	⋮
JW Jarrod Wein jarrodwein@gmail.com	Calgary	B	Live	⋮
MR Martin Reimann martinreimann@gmail.com	Kelowna	B	Live	⋮
AY Alex Yeomas alexyeomas@gmail.com	Kelowna	A	Live	⋮
TG Tyler Gallicano tylergallicano@gmail.com	Vancouver	A	Live	⋮
JB Jim Bo jimbo@gmail.com	Kelowna	A	Live	⋮
TH Trevor Holmes trevorholmes@gmail.com	Calgary	B	Live	⋮
NN Nathan Naumov nathannaumov@gmail.com	Vancouver	A	Live	⋮



Employer

Invoices

Employers can view and download digital invoices anytime, anywhere. They will be able to filter and view invoice details by city as well as the premium breakdown for each employee. They can also view their previous invoices.

WealthCo.
Group Benefits

SB

Welcome,
Simple Ben
simplyben@gmail.com

- Dashboard
- Employees
- Invoices**
- Reports
- Plan Coverage
- Administrators
- Resources

Invoices

View History

- Overview**
- Vancouver
- Kelowna
- Calgary

Summary

Previous Month Premium Due	
Premium Due last month	\$1,213.84
Payment Received	\$1,213.84
Carry Forward Balance	\$0.00

Current Month Premium Due	
Adjustments for Prior Period	\$0.00
Misc Premiums	\$0.00
Optional Benefits Premium	\$0.00
Total Premium For Period	\$1,409.36
Carry Forward	\$0.00
Subtotal	\$1,409.36
<hr/>	
PST	\$5.35
GST/HST	\$1.78
Total Due	\$1,416.49

This total balance includes any carry forward amount due.

