SimplyBenefits

Onboarding with Simply Benefits

A Step-by-Step Guide

Welcome to **Simply Benefits.**

Let's get started.

The purpose of this document is to outline all of the steps required to complete the account **Onboarding process** with Simply Benefits. These steps will contain descriptions of the parties involved in that step, if and how they will be notified, and what actions they need to take.

The whole process from start to finish will only take 10 easy steps!

Ready? Let's go.

Step 1: Accounts Creation

Advisor Account Creation
***Completed by:* The Simply Benefits Team**

This is where the process begins.

- The advisor account will be created **by the Simply Benefits team.**
- The advisor will **receive an email** from the Simply Benefits team notifying them that their advisor account has been created.
- The advisor will also receive an email with their **temporary password** to log in to the Advisor Portal.

Company Account Creation
***Completed by:* The Advisor**

- The advisor will log in to the Advisor Portal and select **'Create Account'**.
- The advisor will then input **all of the following information** to complete their account creation:

- Company Name
- Company Email
- Admin Name
- Street Address
- Suite/Unit (if applicable)
- City/Town
- Province
- Postal Code
- Company Contact Number
- Signing Authority Name and Email

- Once all of the information is input correctly, it's time to click **'Save'**.
- After that, the advisor will be redirected to the **'In Progress'** stage of the account.

Now it's time for Step 2

Step 2: Census Upload

Completed by: The Simply Benefits Team or the Advisor

Now that the advisor has an account, it's time to add the client's Census.

- The advisor can upload the Census on their own (following a template provided within the system) or provide the Simply Benefits team with a Census. Either way, the Census **must contain all of the following information** for the employees:

- First and Last Names
- Emails
- Class
- Division
- Date of Birth *(MM/DD/YYYY)*
- Hire Date *(MM/DD/YYYY)*
- Gender *(Male or Female)*
- Occupation
- Coverage type *(Solo, Duo, or Family)*
- Province *(Acronym)*
- Earnings Type *(Salary or Hourly)*
- Salary *(if EE is salaried — Do not include '$' or ',')*
- Hourly Wage *(if EE is paid hourly — Do not include '$' or ',')*
- Hours per Week

Please Note:
- Make sure that the Census Class & Division **match those that are in the system Census** (they can always be adjusted at any point after the Census has been uploaded).
- The Advisor or the Simply Benefits team will input all of the Census information into the company account and select '**Submit Census'**.

Let's move on to Step 3

Step 3: Account History

Completed by: The Simply Benefits Team or the Advisor

The advisor will now add some more information about the created company account.

- The advisor can upload the **Rates History, Claims History, Past Bills**, and any other Supporting Documents into the **'History'** portion of the created company account.
- If the quote has already been agreed upon then **the advisor can skip this page** as the documents are already within the system or request that the Simply Benefits team uploads the history documents for them.

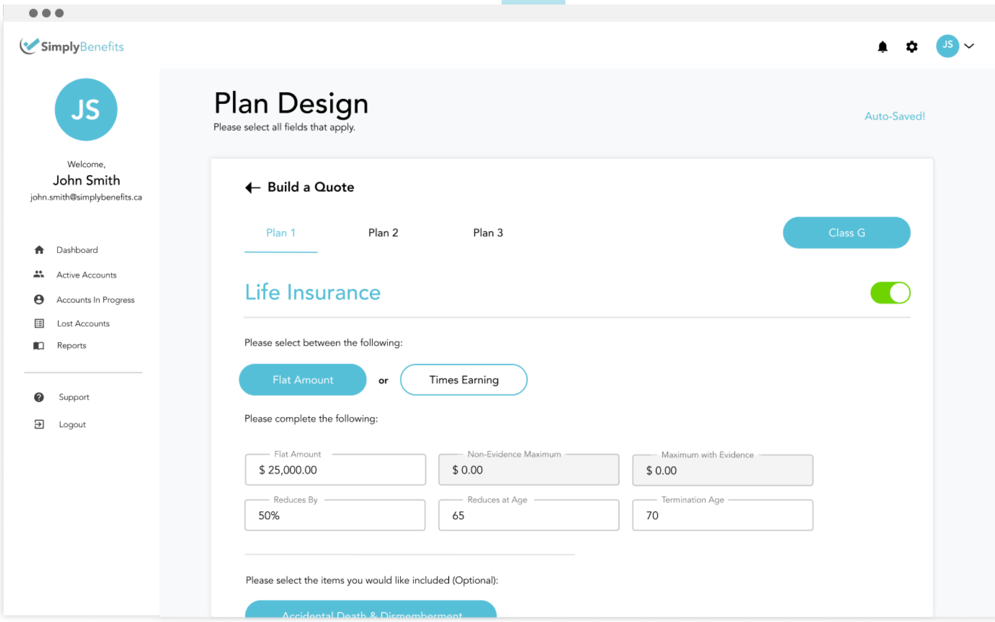
Now it's time for Step 4

Step 4: Building the Plan Designs

Completed by: The Simply Benefits Team or the Advisor

It's now time to start building the plan design!

- The advisor can build the Plan Designs **themselves** or request that the Simply Benefits team **builds the designs for them**.
- If the advisor chooses to build it on their own, they will select the '**Plan Design'** option under the company account and **choose their Class.**
- The advisor will then select **'+New plan'** design and begin building the lines of benefits.
- Should the advisor choose to have the Simply Benefits team fill in the Plan Designs then there is **no action required** from the advisor's side.
- It is the **advisor's responsibility** to notify the Simply Benefits team of any changes to the plan designs and/or number of lives.



Let's continue with Step 5

Step 5: Commissions

Completed by: The Simply Benefits Team or the Advisor

Next, the advisor will be prompted to add and set commissions.

- The advisor can choose to view and set the commissions for all lines of benefits or **set them individually**.
- The advisor can **request that the Simply Benefits team fills this section** out at which point there is no action required from the advisor's side.

Now it's time for Step 6

Step 6: Master Application

Completed by: **The Advisor**

It is now time for the Master Application to be finished and signed by the advisor.

- If the advisor requested that Simply Benefits complete steps 2 - 5, then **they will be notified** once the Master Application is ready to be signed.
- The advisor can **now review and sign off** on the Master Application that will require the additional input of:

- The Nature of Business
- The Business type *(Corporation, Partnership, Sole Proprietorship, or Unionized)*
- Existing Group Benefits
- Applicant Stop Loss
- Any additional notes
- Advisor Signature and Name
- Advisor Signature Date

- The advisor can then select '**Save'** and return to the Master Application at a later date or they can select **'Save & Submit'** which will allow them to move on to Step 7.
- The advisor **cannot request that the Simply Benefits team completes this section** as it requires their signature.

Now it's time for Step 7

Step 7: Send for Underwriting

Completed by: **The Advisor**

The Master Application is now done and ready to be sent off.

- Upon completing the Master Application, the advisor will select the **'Send for Underwriting'** option under the company account.
- The Simply Benefits team will **review the application** and **assign all the pricing** to the plans.

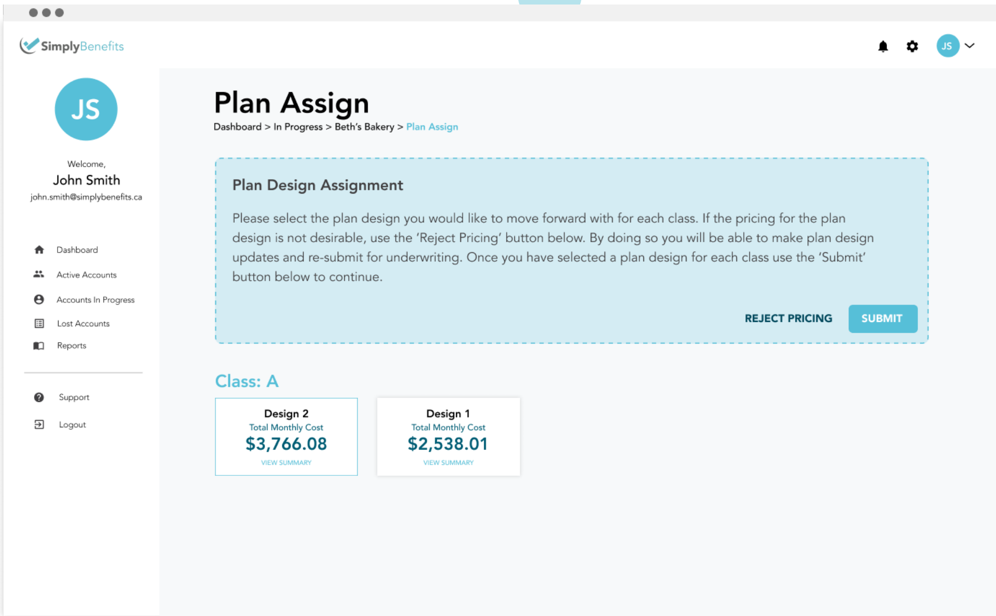
Let's move on to Step 8

Step 8: Assign Plans

Completed by: The Advisor

The advisor will now be able to review the pricing for each plan and select the right one for their client.

- The advisor will **receive an email** (and a notification in the advisor portal) from Simply Benefits when this step is ready to be completed.
- The advisor will then be able to select **'Assign Plans'** to review the pricing and view the summary for each Class.



Now it's time for Step 9

Step 9: Request Approval

Completed by: The Advisor and the Signing Authority

The client will now be looped in to sign the Master Application and finalize the process.

- Upon completing the Assign Plans portion, the advisor will select **'Request Approval'** option under the company account.
- The Signing Authority will then receive an **email** from noreply@simplybenefits.ca with a **link** that is valid for 24 hours and it will allow them to review the Plan Designs and Pricing as well as add their **banking details**, their **signature**, **name**, and the **signing date** to the Master Application.
- The Signing Authority will also **require a Witness** to sign, input their name, and date the signature on the Master Application.

One more step to go!

Step 10: Go Live!

Completed by: The Advisor

It's time to go live! There are only a few more things that need to be completed before you are officially up and running with Simply Benefits.

- The advisor will receive an **email** (and a notification in the advisor portal) to let them know that they can select **'Go Live'**.
- The advisor can pick a start date for the account when selecting **'Go Live'**.
- The Simply Benefits team will be notified of this change internally and will then reach out to the advisor to **discuss the next steps** in the company Implementation.
- The only item remaining after this step will be for the Simply Benefits team to ensure that the **drug cards are set up**, after which enrollments will be enabled.
- The Simply Benefits team will **reach out to the Admin & Advisor** to notify them and begin the Implementation process.

Congratulations! You are now officially onboarded with Simply Benefits.

Have more questions? We're here to help.

Implementation Specialist

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