



Employee Benefits Made **Simple.**

# Meet **Simply Benefits**.

## Employee Benefits Made **Simple**.

Simply Benefits is a **100% digital Employee Benefits Third-Party Payor (TPP)** that allows employees, employers, and advisors take better control of their employee benefits management on their own dedicated, user-friendly platform.

In other words — we **offer employee health benefits** through our platform and **make them easy** by creating straightforward, accessible, and innovative employee benefits solutions.

## How it **Works**.

We believe that **advisors are integral** to the world of employee benefits, which is why **we'll never go direct**.

It's our mission to work with advisors that are trusted experts in their field to provide their clients with the **best employee benefits** possible. That's why we created not one, but three platforms for each individual (advisor, employer, and employee), so you can onboard faster and manage clients easier through the interconnected platforms.

It all starts with the advisor. You can **digitally create a client** account, upload their census, design a plan, receive pricing, and send off the master application for your client to review **all 100% digitally**.

The best part? We made it easier for employers and employees to manage their benefits needs autonomously, so you have the time to onboard and manage more clients. **It's a win-win-win.**

## How Do We **Stack Up**?



### Traditional Benefits Provider

vs

- ✔ 100% Digital Benefits Management
- ✔ 5 Minute Guided Digital Enrollment
- ✔ 1 Minute Digital Claim Submission
- ✔ Digital Drug and Travel Card
- ✔ Digital Booklets and Forms

- Printed Forms, Snail Mail, and PDFs
- Paper Form Enrollment, HR Mailing In
- Digital and Paper Claim Submission
- 6 Week Drug Card Wait (Paper Drug Card)
- Paper Booklets and Forms



# Our Portals.

## Simply Benefits for **Employers.**

The employer portal was designed for **busy professionals** that want to get the most out of their TPP.

We created the portal to ensure that **employers and HR administrators** have the **flexibility to easily manage** and make updates to their employees' benefits.

Available on **desktop** and **tablet**.

### Employer Portal

#### FEATURES

- Digital Onboarding,
- Mass Email and Push Notifications,
- Digital Employee Updates/  
Terminations/Additions,
- Administration Management  
(Create and Remove Admins),
- Digital Booklets,
- Online Billing,  
and Much More!

[View Employer Portal](#)

## Simply Benefits for **Employees.**

The employee portal was designed to empower employees to **easily access, and manage their health benefits** from virtually anywhere, **24/7**.

The best part? Employees can digitally **enroll** and begin using their benefits **in less than 5 minutes**.

Available on **desktop, tablet,** and **smartphone** (app).

### Employee Portal

#### FEATURES

- 5 Minute Digital Enrollment,
- Digital Drug Cards,
- Digital Claim Submission,
- AI-powered Search,
- Easy Coverage Lookup,
- Benefits Usage Tracker,
- Digital Benefits Booklet,  
and Much More!

[View Employee Portal](#)

## Simply Benefits for **Advisors.**

The advisor portal was designed for **modern thinking** experts in their field.

We created the portal to ensure that managing clients and onboarding new ones **is fast, easy, and straightforward.**

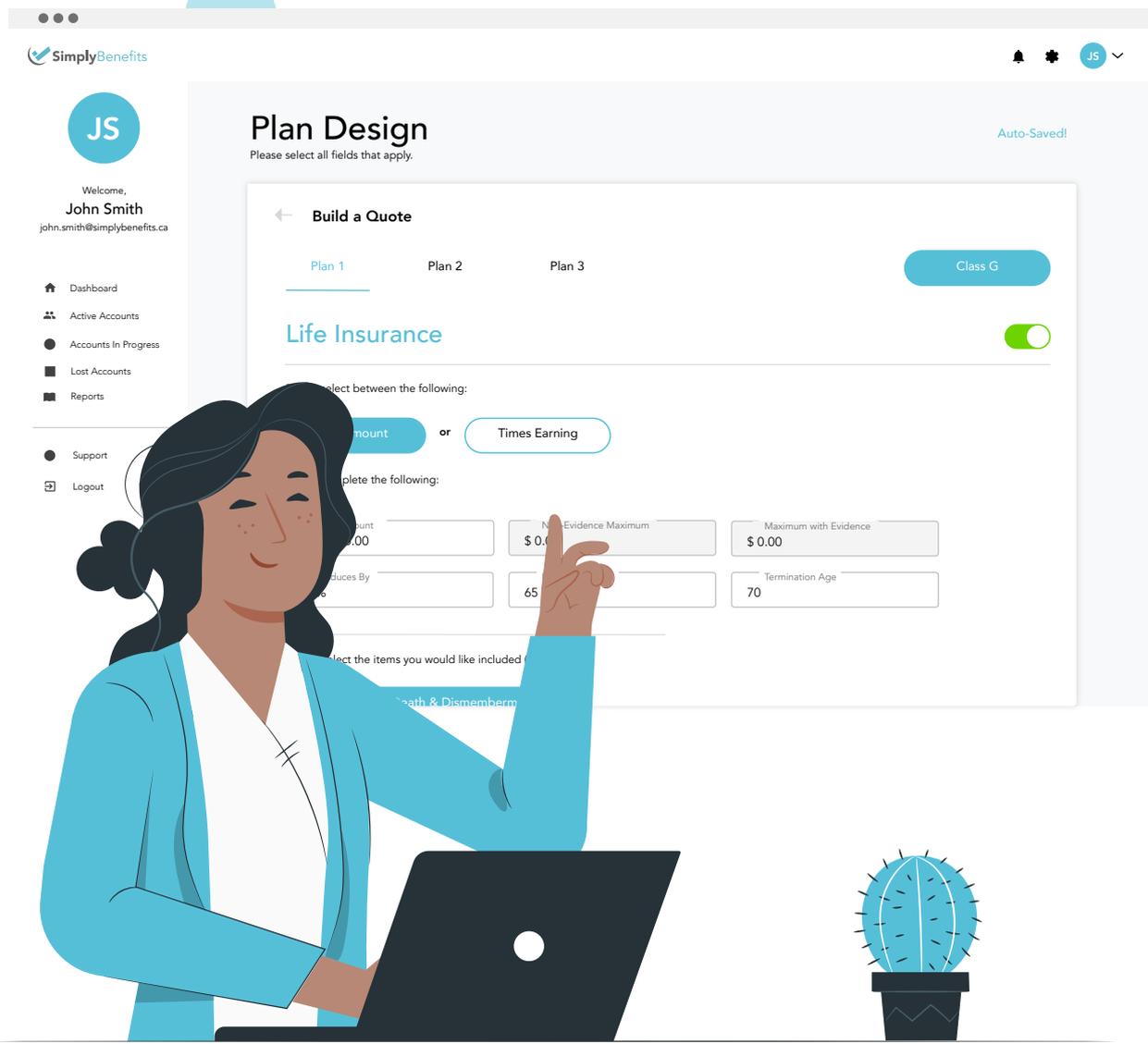
Available on **desktop** and **tablet.**

### Advisor Portal

#### FEATURES

- Digital Master Application,
- Digital Census Data Upload (CSV file or Manually),
- Customizable Plan Designs,
- Digital Plan Design Comparison,
- E-Signatures,
- and much more!

[View Digital Plan Design Creator](#)



# Digitally Connected from Advisor to Employee

We know that **the industry is outdated**, which is why it was our mission to make our entire product 100% digital. Now, the process is completely paperless so that **onboarding, enrolling, and managing is seamless** every step of the way. Check out some of the easy, digital steps in the onboarding process:

SimplyBenefits

Welcome,  
John Smith  
john.smith@simplybenefits.ca

Dashboard  
Active Accounts  
Accounts In Progress  
Lost Accounts  
Reports  
Support  
Logout

### Census

Please select all fields that apply.

#### Employee

Name\* Email\* Class\* Division\*

Date of Birth\* Hire Date\* Gender\* Occupation\*

Individual/Dependents\* Province of Residence\* Earnings Type\* Salary\*

Cancel Save

#### Census Data

Name	Email	Birth Date	Class	Division	Hire Date	Gender
Jane Doe	jane.doe@gmail.com	Sep 1, 1990	A	Div 1	Aug 1, 2020	Female
Jane Doe	jane.doe@gmail.com	Sep 1, 1990	A	Div 1	Aug 1, 2020	Female
Jane Doe	jane.doe@gmail.com	Sep 1, 1990	A	Div 1	Aug 1, 2020	Female
Jane Doe	jane.doe@gmail.com	Sep 1, 1990	A	Div 1	Aug 1, 2020	Female
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## Master Application

You can begin the onboarding process digitally by creating a new account on the advisor dashboard, uploading or **entering census data**, designing a benefits plan, and sending off the details for underwriting/pricing.

## Review & Assign Plan

Once our underwriter prices out your submitted plan designs you can easily review **and compare monthly premiums** on your dashboard before assigning the plan that's best for your client.

Once you assign a plan, you can send the master application via email to your client for them to review.

SimplyBenefits

DOWNLOAD PRICING PACKAGE | DOWNLOAD PLAN DESIGN

### Review & Sign Application

Review the master application provided by your account advisor below. Once you feel the application is correct with a witness sign and submit the application below. If you find any mistakes or issues with the data, please contact your advisor.

Submit

#### Group Applicant Data

The Flower Shop 1

123 Lakeshore Avenue, Kelowna, BC V1W 0B3, Canada

Flower Store

Business is:

Corporation  Partnership  Sole Proprietorship  Unionized

Existing Group Benefits:

Applicant current has existing group benefits?

SimplyBenefits

Welcome,  
John Smith  
john.smith@simplybenefits.ca

Dashboard  
Active Accounts  
Accounts In Progress  
Lost Accounts  
Reports  
Support  
Logout

### Plan Assign

Please select all fields that apply.

#### Plan Design Assignment

Please select the plan design you would like to move forward with for each class. If the pricing for the plan design is not desirable use the "Reject Pricing" button below. By doing so you will be able to make plan design updates and re-submit for underwriting. Once you have

Reject Pricing Submit

Class: A

Design 1  
Total Monthly Cost  
**\$56.01**  
VIEW SUMMARY

## Client Review

Once you send the master application to your client, they will receive an email with a link to the **digital master application**.

From there, they can download a copy of the pricing package and plan design. Once they review the details, they can e-sign the master application and then you can select when they can officially go live and begin accessing the Simply Benefits platform.

# Introducing Digital Employee Enrollment.

We designed a **guided, digital enrollment form** that allows employees to easily enroll in their health plan in less than 5 minutes. The best part? Employees can enroll from any location, on any device, any time of day. Here's how:

**1** First, employees will receive an email from **Simply Benefits**, where they can click the "Sign Up" button to be taken to the **digital enrollment form**! Then, they will enter their email and create a password.

The form is titled "Create Account" and has a progress bar at the top with the following steps: Create Account, Details, Dependents, Beneficiaries, Trustee, Spending Accounts, and Confirmation. The "Create Account" step is currently active.

**Create Account**

Email

Password

CONTINUE

**Details**

First Name

Last Name

Address\*

Coverage Type

CONTINUE

**Dependents**

First Name

Last Name

Relationship

CONTINUE

**Beneficiaries**

First Name

Last Name

Shares

CONTINUE

**Trustee**

First Name

Relationship

CONTINUE

**Spending Accounts**

Amount Available: \$1,000,000

Health Spending Account

Lifestyle Spending Account

CONTINUE

**Confirmation**

I acknowledge that this information is correct.

Signature

FINISH

**3** The third step is for adding **Dependents**. Here is where employees can add their dependents' information such as their name, **relationship**, and email address. If their spouse has their own coverage they can also enter it here.

**5** The fifth step is for employees to add a **Trustee**. A Trustee only needs to be included if an employee has a beneficiary that's under the age of 18.

**Note:** If none of their beneficiaries are under 18, then they can skip this step.

**7** Once all the information in the form is filled and correct, employees can move onto the final step. This is to **e-sign** their enrollment form and officially enroll in their benefits plan.

**It's that easy!**

**2** The second step is for filling out **general information** like employees' phone number, address, marital status, and **coverage type**. Some of this information will already be pre-filled from the census data.

**4** The fourth step is for selecting **Beneficiaries**. Here employees can specify which individuals they would like as their beneficiaries and the number of shares that they would like to allocate to them. Employees can add as many beneficiaries as they would like by clicking the "**Add Beneficiary**" button.

**6** The sixth step is for **Spending Accounts** (optional). If flexible spending accounts are included in your clients' benefits plan, employees can **select how they would like to split** the amount available between their Health Spending Account and Lifestyle Spending Account.

# Our Products.

We know your clients want **options**, so we created them.

With Simply Benefits, businesses can choose to **upgrade** and completely brand their employer and employee portals (desktop, and app) with **their businesses logo, brand colours**, and **dedicated support team**.

## Pro

### Standard Product

Our most popular, and affordable version of Simply Benefits.

#### About Pro

Simply Benefits Pro offers a unique and user-friendly experience for employers and employees. Each have their own portal to store, bill, monitor, and manage their employee benefits needs in one simple place.

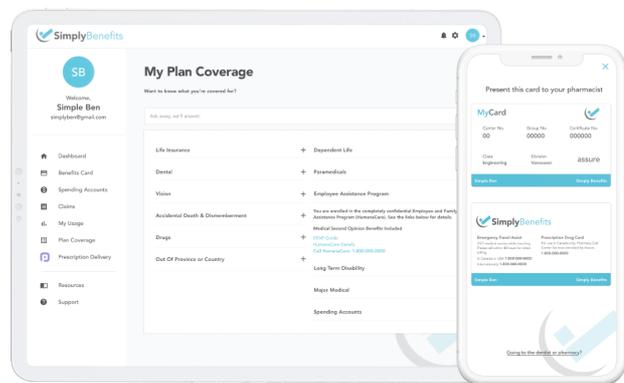
Simply Benefits Pro is perfect for small businesses, or organizations with 500 people or less.

#### Employer Features

- ✓ Real-Time Updates
- ✓ Access Digital Forms
- ✓ Send Push Notifications
- ✓ Digital Onboarding
- ✓ E-Signing

#### Employee Features

- ✓ Digital Drug Card
- ✓ Quick Claim Submission
- ✓ AI-Powered Search
- ✓ Easy Coverage Lookup
- ✓ Benefits Usage Tracker



## Enterprise

### White Label Product

Created for organizations that want to completely own their Employee Benefits experience.

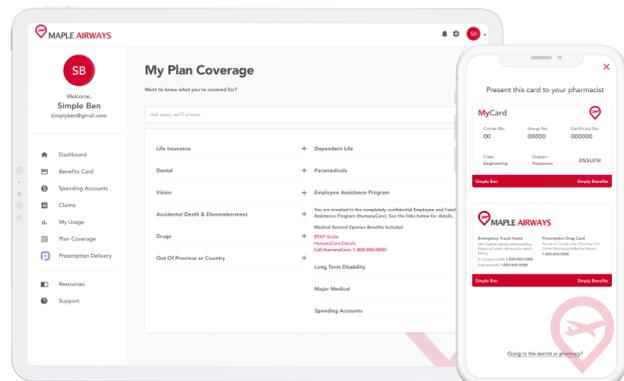
#### About Enterprise

Simply Benefits Enterprise includes all the same amazing features as Simply Benefits Pro, but with fully branded employer and employee platforms that include your clients' logo, brand colours, and a dedicated support team.

Simply Benefits Enterprise is perfect for large organizations with 500 people or more.

#### Employer and Employee Features

- ✓ All Pro Features
- ✓ Branded Portal
- ✓ Brand Logo
- ✓ Branded App
- ✓ Brand Colours



# Simply Benefits Partnership

We didn't forget about you either. We created Simply Benefits Partnership for advisors that want to **take their operations to the next level.**

## Partnership

### Advisor Product

Created for advisors that want to use the Simply Benefits portals with their branding.

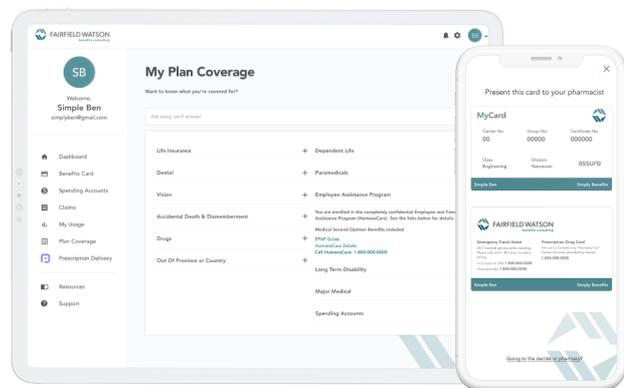
### About Partnership

Simply Benefits Partnership was created for advisors who want their own branded Third-Party Payer, with little setup time. All your clients will experience the Simply Benefits platform with your brand colours and logo, from start to finish.

Simply Benefits Partnership is perfect for brokerages that have 15+ advisors.

### Employer and Employee Features

- ✓ All Pro Features
- ✓ Your Brand Logo
- ✓ Your Brand Colours
- ✓ Branded Portal
- ✓ Branded App



## Let's Chat.

Interested in learning more? **Let's talk!**

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**TELEPHONE** (778) 484-9816

**ADDRESS** 601-460 Doyle Ave,  
Kelowna BC V1Y 0C2

**WEBSITE** simplybenefits.ca

**EMAIL** joanne.willis@simplybenefits.ca

**TELEPHONE** (519) 818-5683

**ADDRESS** 74 Stanley St,  
Ayr ON N0B1E0

**WEBSITE** simplybenefits.ca

# Videos Made to Help.

If you need help check out some of our videos that walk you through each part of the platform.



## How to Set Up a Master Application



### How to Set Up a Master Application

[Watch Video](#)



## How to Create a Plan Design



### How to Create a Plan Design

[Watch Video](#)



## How to Create a Quote



### How to Create a Quote

[Watch Video](#)



## How to Create Classes, Divisions, and Upload Account History Documents



### How to Create Classes, Divisions, and Upload Account History

[Watch Video](#)



## How to Set Commissions



### How to Set Commissions

[Watch Video](#)



## How to Assign Plans and Request for Approval



### How to Assign Plans and Request for Approval

[Watch Video](#)

