# Administrator Centre

## Navigation guide

# Welcome to the Administrator Centre

**This navigation guide is a practical tool to help you find your way around your Administrator centre.**

## About the Administrator Centre

The Administrator Centre is **your personalized space** where you can **manage your group insurance contract**, when you want, where you want.

You'll find it all in one place:

- Contract documents and brochures
- Policy and coverage information
- Billing-related documents
- Your communications via the secure messaging
- And much more...

The **Administrator Centre** also allows you to make changes to plan members' coverage and employment status.

**Stay tuned to our news!**

The new Administrator Centre never stops improving. Several features will be added in the coming months.

This beta version allows us to test the features implemented by a limited number of users external to Beneva.

At any time, you can send us your comments and share your experience with us, so that we can constantly improve and enhance our new ecosystem. This will also enable us to identify and resolve any problems or bugs that may arise.

# What are the roles in the **Administrator Centre**?

**Administrator Centre** users can have different roles. Access to information in the **Administrator Centre** differs depending on the role you have been granted.

Your **Administrator Centre** is personalized according to the access rights you have been granted. Some of the items listed in this guide's menu may not be visible or editable in your **Administrator Centre**.

Your group's **Authorized representative** identifies a **Super user** using the *Access to Beneva Administrator Centre* form.

### Super user

The person identified as a **Super user** is usually the policyholder's representative, the person responsible for insurance and billing.

This person has access to all your group's information in the **Administrator Centre**. However, depending on the authorization granted by the authorized representative, they may or may not have access to all the features available to your group.

As a **Super user**, this person is responsible for:

- Granting access to users and keeping them up to date.
- Protecting the confidentiality of information in the **Administrator Centre**.

This person can assign delegates for the group.

### Delegate

The person identified as a **Delegate** usually holds an administrative support role with the group.

They are appointed by a **Super user**. Depending on the authorization granted to them in the **Administrator Centre**, they may have limited access to certain functionalities.

# What do you want to do in your **Administrator Centre** today?

Click an item below to go directly to the corresponding section.

# Enter my Administrator Centre

Each tile represents a section in your **Administrator Centre**.

Click the *Group and plan member administration* tile to administer your groups and members.

Click the *Disability file administration* tile to manage disability files.

Other tiles will be available when new features are added to the **Administrator Centre**.

# Administer my groups and members

Easily access the various features that allow you to manage your group and members.

Click the *Groups and Members Administration* tile from the home page of your **Administrator Centre**.

## View my profile

It's possible to view your user profile as well as update your password directly from your **Administrator Centre**.

### Access your profile

In the top right corner of your portal, click the *Profile* icon, marked with you initials

The *User profile* page displays your personal information.

To update your profile, contact the Super User for your group.

You are the Super User? Please refer to the section Update user access.

### Change your password

Click the Edit *profile* button.

The *Login security* screen is displayed. At the *Password* line, click the *Change* button.

The *Enter your password* screen is displayed.

Confirm the current password. Click *Continue*.

Enter your new password in accordance with the established criteria. Click *Close*.

## View my account details

With the **Administrator Centre**, it's possible to view your account details in a few easy steps.

### Access Account information

In the vertical menu bar, click the *Account information* tab.

Your account information is displayed, such as your username, plan, list of contacts identified for your account, departments and company contact details.

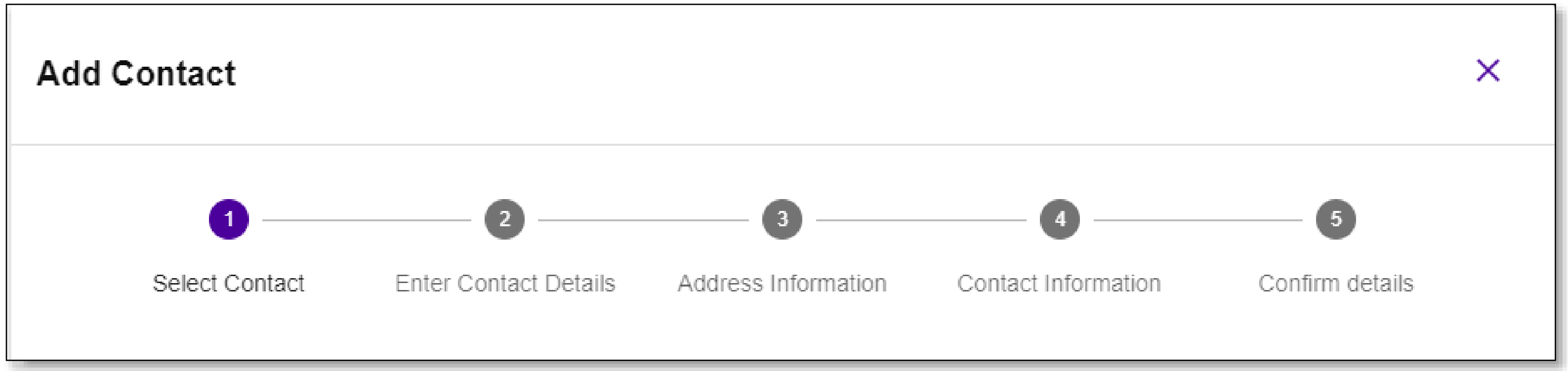
**Only the Super user may visualize the Account information.**

Back to main menu

## Add a contact person

On the *Account information* tab in the *Contacts* section, click the *Add a contact* button.

Follow these five simple steps.




## Further details

### Select Contact (Step 1)

Search for the name of the contact person to add.

- If the contact person is already in the **Administrator Centre**, select this person and click the *Next* button.
- If the contact person is not yet in the **Administrator Centre**, click *Continue adding a New Contact*.

A contact person is somebody assigned to one or several specific aspects of your group, such as billing, disability management, life insurance or others. This person’s contact information will be visible solely to Beneva employees to facilitate communications.

# Add a Delegate

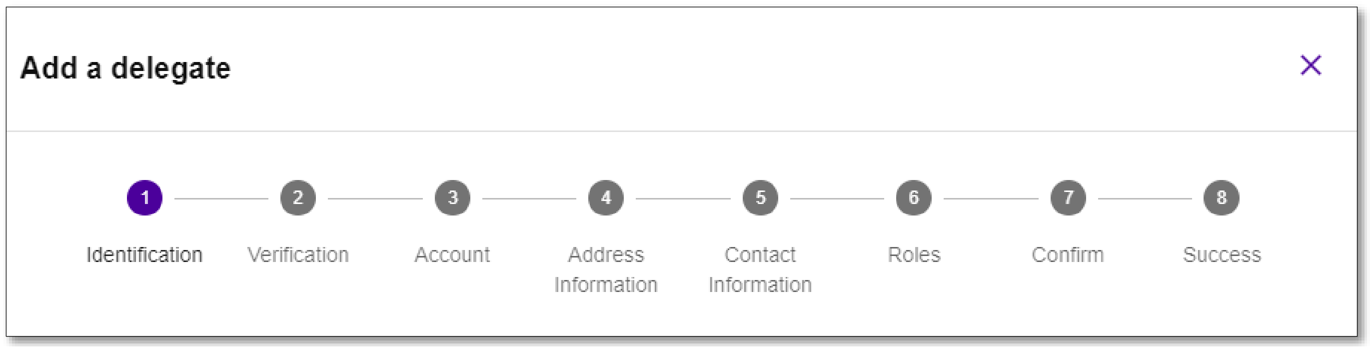
You want to grant access to a member of your company? The **Administrator Centre** allows you to easily do that. You can grant them full or limited access, depending on your preference and this user's duties in your company.

**Only the Super user may add a Delegate.**

## Identify the Delegate

On the *Admin* tab in the vertical menu bar, click the *Add a delegate* button in the top right corner of the screen.

Follow the eight simple steps.



## Further details

### Verification (Step 2)

If the user does not already have an **Administrator Centre** account, click *Continue adding a New User*.

To change security access, see Update User access.

### Contact Information (Step 5)

Add the delegate's phone number.

Enable *the Primary Phone* button for the main number.

**It is recommended that you choose the cell phone number as the main number to facilitate the delegate's login.**

Add the delegate's email address. Enable the *Primary Email* button.

### Roles (Step 6)

Select the user's role from the list. Be sure to read the description of each role. It is possible to select more than one item.

### Confirm (Step 7)

Review the information displayed.

- If changes are needed, go back to previous windows to correct by clicking the *Previous* button.
- If the information is correct, click *Next.*

The delegate is now created. Click *Complete*.

**The new user will automatically receive an activation email.**

# Update user access

Do you want to change a user's access?  The **Administration Center** makes it easy for you to do this.

## Access the user's information

Click on the *Admin* tab.

Click on the name of the delegate you want to edit.

## Update User access

Click on the *Update User Access* button.

The *Update User Access* page appears.  Select the desired new role(s).

Click the *Save* button.

# See the list of members in my group

The **Administrator Centre** allows you to view a list of your group's plan members, as well as their file details.

## See the list of plan members

Click the *Members* tab in the vertical menu bar. The list of members in your group is displayed.

## Search

In the top right corner of your screen, click the *Filter* icon to access the search bar. You can search using:

- employee number
- the first and last name of the member
- or their insurance certificate number

You can also filter and sort the list of members according to the criteria displayed.

## See details of a member's file

On the *Members* tab, click the person's name.

### Summary tab

This page lets you view a plan member's certificate number, benefits and coverage, as well as employment, class, and salary information.

### Profile tab

View a plan member's demographic data, dependents, physical address, and contact details.

Click the *Edit* button in each section to change a plan member's correspondence language, address or contact details.

### Documents tab

View documents sent to the plan member.

### Beneficiaries tab

View a plan member's beneficiaries.

A member has to register or change beneficiaries themselves in their **Client Centre**. It's currently impossible to add or change beneficiaries in the **Administrator Centre**.

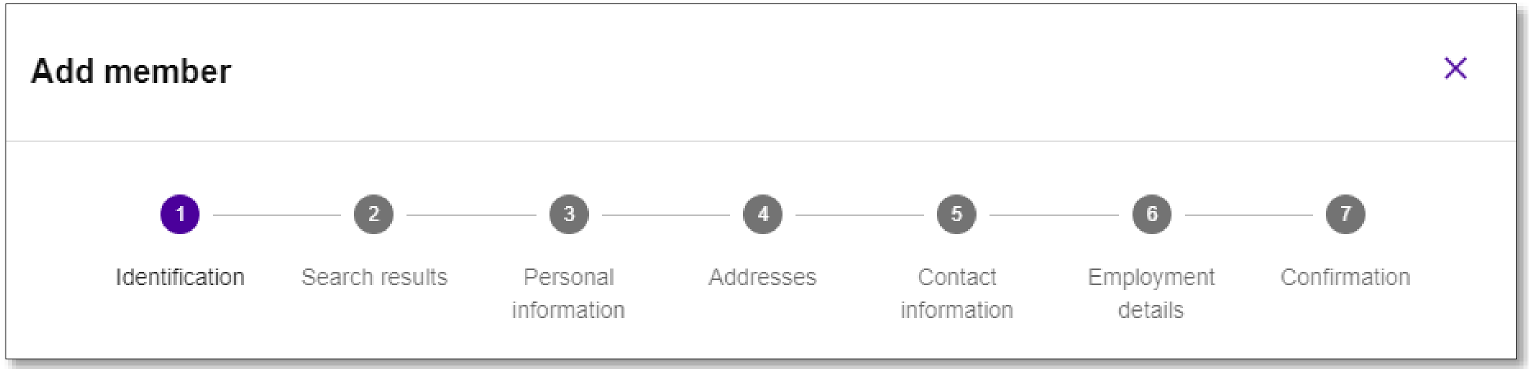
# Add a new member

You've made a new hire? Great! The **Administrator Centre** allows you to add a new plan member in a few steps.

## Add a plan member

On the *Participant*s tab, click the *Add member* button in the top right corner of the screen.

Follow the seven simple steps.




A unique employee ID number is required to add a member.

## Further details

### Search results (Step 2)

The portal displays members with identical same surname, first name, or date of birth. Check that the new member is not an existing participant in the portal. If it does not exist, click the *New Member* button.

### Contact information (Step 5)

Enter the member's contact information.

**The member's personal or professional email address is mandatory.**

Enable the *Primary Email* button for one of the addresses.

### Employment details (Step 6)

Enter the member's employment information.

The *Payroll Cycle, Class, Division,* and *Salary* sections are mandatory. Click on the *Add New Class, Add New Division*, and *Add New Salary* buttons to open each section.

**CAUTION: Only the Annual salary mode is available for now.**

### Confirm (Step 7)

Review the information displayed.

- If changes are required, return to previous windows to correct it by clicking the *Previous* button.
- If the information is correct, click *Confirm.*

Once a member has been added, it's important to complete the member's enrollment by adding coverage.

# Add a newly hired member’s coverage

Adding a member’s coverage is easily and quickly done in the **Administrator Centre**.

## Create a *New hire* event

On the *Members* tab, click the name of the person for whom coverage must be added.

In the top right corner of the screen, click the *Enrollment* button.

The *Enroll* page displays. Select *New hire* event from the list.

Click the *Continue* button.

In the *Event Details* section, enter the hiring information by filling out the required fields.

## Add Dependents

In the *Dependents* section, click *Add Dependent*.

The *New Dependent* screen is displayed.

Follow the two simple steps.

## Further details

### Demographics (Step 1)

Enter the dependent's sociodemographic information. Click the *Next* button.

### Confirmation (Step 2)

Review the information displayed.

- If changes are required, return to previous windows to correct it by clicking the *Previous* button.
- If the information is correct, click *Continue*.

The *Enroll* page displays again.

**If other dependents need to be added, repeat the same steps for each dependent.**

Once all dependents are added, click the *Next* button.

## Select coverages

Select the tile of the first product you want to add and click *Next*.

For each type of benefit, select the type of coverage desired.

Click the *Save and continue* button to save your choices.

**Repeat these steps for each product you want to add.**

The *Opt-out* button in the top right corner of the screen allows an insured person to opt out of a benefit.

The *Confirm enrollment* page is displayed. Review the information displayed.

- If changes are required, return to previous windows to make corrections by clicking on the *Previous* button.
- If the information is correct, click *Complete registration*.

**The new user will automatically receive an activation email to access their Client Centre.**

Once this step is done, it’s essential to remind the member to add his beneficiaries and bank details himself in the **Client Centre**.

It’s currently impossible to add or change beneficiaries in the **Administrator Centre**.

# Change a member's coverage and dependents

Changing a member's coverage can be easily done in the **Administrator Centre** by adding an event.

## Create a new event

On the *Members* tab, click the name of the member for whom coverage must be added.

In the top right corner of the screen, click the *Enrollment* button.

The *Enrollment* page displays. Select the appropriate event from the list.

Click the *Continue* button.

In the *Event information* section, enter information about the event by filling out the required fields.

## Add dependents, if applicable

In the *Dependents* section, click *Add dependent*.

Follow the two simple steps.

## Further details

### Demographics (Step 1)

Enter the dependent's sociodemographic information. Click the *Next* button.

### Confirmation (Step 2)

Review the information displayed.

- If changes are required, return to previous windows to correct it by clicking the *Previous* button.
- If the information is correct, click *Continue*.

The *Enroll* page displays again.

**If other dependents need to be added, repeat the same steps for each dependent.**

Once all dependents are added, click the *Next* button.

## Change dependents, if applicable

In the *Dependents* section, under the name of the dependant you want to change, click the *Edit* button.

Select the new *Relation* from the drop-down list.

Click the *Save* button.

### Select a coverage to change

A page showing the member's coverage is displayed. Select the tile corresponding to the coverage to be changed. Click the *Next* button.

Select the appropriate changes of coverage, if applicable. Then, click on *Continue* until the section *Covered persons* appears.

**If you wish to terminate the coverage of a dependent, consult the section Terminate the coverage of a dependent, if applicable.**

Click the *Save and continue* button to save your choices.

The *Confirm enrollment* page is displayed. Review the information displayed.

- If changes are required, return to previous windows to correct it by clicking the *Previous* button.
- If the information is correct, click *Complete registration*.

**Repeat these steps for each product to add.**

### Terminate the coverage of a dependent, if applicable

To reach the *Covered persons* section, follow the steps to Select a coverage to change.

**To terminate the coverage of a spouse, be sure to first change the dependent to a former spouse status.**

Untick the dependent box for which you are terminating the coverage, then click on *Continue*.

Click on the button *Save and Continue* on the bottom right corner of the *Enroll* process.

Repeat those steps for every product under which the dependent is covered.

# Change a member's salary

You can easily change a member's salary in your **Administrator Centre**.

## Change a member's salary

On the *Members* tab, click the person's name whose employment status is being changed.

In the *Salary* section, click the *Change* button.

The E*dit Salary* screen is displayed. Click the *Add new salary* button.

Enter the effective date of the new salary. An end date is automatically added to the previous salary.

Click the *Save* button.

# Request an employment status change

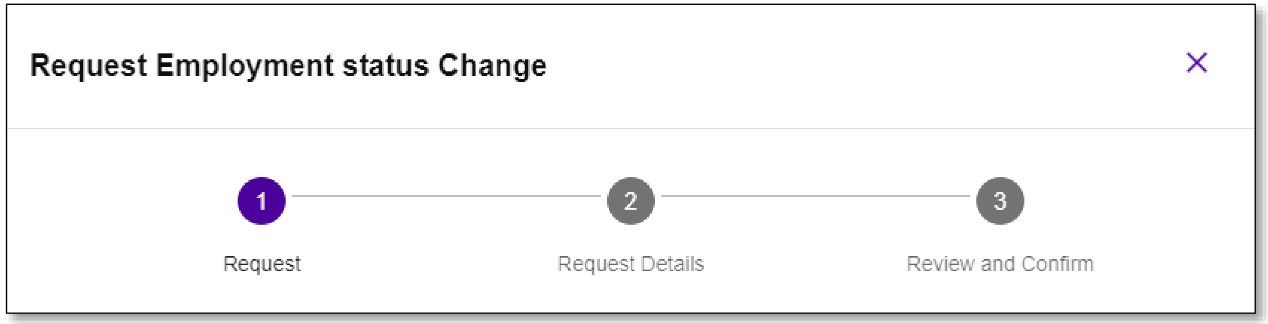
The **Administrator Centre** allows you to request an employment status change directly, easily, and autonomously.

## Request an employment status change

On the *Members* tab, click the person's name whose employment status is being changed.

In the *Employment Details* section, click the *Request Employment status change* button.

Follow the three simple steps.



## Further details

### Request Details (Step 2)

Select the coverage to keep and select a new employment status from the dropdown menus.

Enter the effective date of the new status.

### Review and Confirm (Step 3)

Review the information displayed.

- If changes are required, return to previous windows to make corrections by clicking on the *Previous* button.
- If the information is correct, click *Continue*.

Allow 24 to 48 hours for processing. Once Beneva has processed the request to change employment status, the member's new status will appear in your **Administrator Centre**.

# Terminate a member’s employment

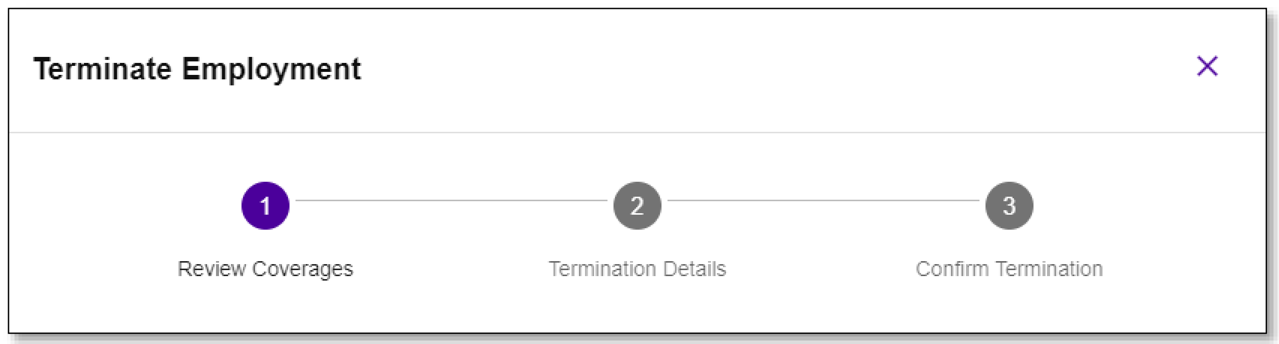
The **Administrator Centre** allows you to terminate a member’s employment and therefore cancel all their coverage.

## Terminate a member’s employment

Using the *Members* tab, click the person’s name whose employment status is being changed.

In the *Employment Details* section, click the *Terminate Employment* button.

Follow the three simple steps.



## Further details

### Termination Details (Step 2)

Enter the termination date (date of termination of employment).

Select the reason for termination from the dropdown menu.

**The termination date (date of termination of employment) to be entered must be the day after the last day worked.**

### Example

Last day worked: January 15, 2024.

Date of termination of employment to be declared in the Administrator Area: January 16, 2024.

The member's insurance coverage will remain in force **until January 15 at 11:59 p.m.**

### Confirm Termination (Step 3)

Review the information displayed.

- If changes are required, return to previous windows to correct it by clicking the *Previous* button.
- If the information is correct, click *Continue.*

# View and send messages

Your **Administrator Centre** also allows you to get in touch securely with us. You can send and receive messages using secure messaging in a few easy steps.

## View messages received

In the vertical menu bar, click the *Messaging* tab.

Clicking on the *Inbox*, *Sent* and *Archive* buttons to view your received, sent, and archived messages.

In the top right corner of the screen, use the *Filter* icon to filter messages.

**An email notification is automatically sent to the user after receiving a new message.**

## Send a new message

Under the *Sent* tab, in the top right corner of the screen, click the *New message* button. The *New message* screen is displayed.

Enter message subject (mandatory field).

Select the message subject from the dropdown menu (mandatory field).

Write the message.

## Attach a file

In the *New message* screen, in the top right corner, click the *Attach a file* button.

Drag or download the file from your computer.

Click *Send*.

# View my billing

The **Administrator Centre** allows you to easily and quickly view an invoice summary and also download detailed billing data for all your group's plan members.

A notification is sent by email when a new invoice is available in your **Administrator Centre**.

## View an invoice summary

In the *Billing* tab, in the *Invoices* section, the latest invoice is displayed.

To view a previously issued invoice, or if the payment has already been applied, remove the *Open* filter using the button at the top of your list.

Click *View bill* to display an invoice summary in PDF format in a new tab on your screen.

Click the *Download* icon in the browser to export the PDF.

## View detailed billing data for all members

In the *Billing* tab, in the *Invoices* section, click the invoice number.

View an overview of invoices, summary, payment, and balance to pay history, as well as a summary of items in the current period.

To view invoice details by member, scroll down the screen to the *Information on current items* section.

## Export detailed billing data for all members

To export billing details by member in Excel format, click the *Export component information* button.

Retrieve the file from your downloads.

To make detailed data easier to read, please add filters to columns or hide them in the Excel file, as required.

# View my policy

The **Administrator Centre** also allows you to view information about your group policy, plans and products.

## Access your policy

Click the *Policies* tab in the vertical menu bar.

The *Policies* page is displayed. Click the policy number to be viewed.

The *Policy Details* page is displayed. This page allows you to view policy information, including products held by the group, as well as documents related to this policy.

## View plan details

On the *Policy Details* page, in the *Plans* section, click the plan to view.

The *Plan Details* page is displayed. This page allows you to view plan information, including the plan description, effective period, status as well as classes.

# View my documents

Want to view a document or report? No worries! The **Administrator Centre** has everything in one place from the contract and booklets to all reports that were requested manually.

## Access documents

In the vertical menu bar, click the *Group Documents* tab.

The *Group Documents* page displays. This page allows you to view all requested documents and reports. Click the document to view.

## Search

In the top right corner of the screen, use the *Filter* icon to search a document.

## Request a document

In the top right corner of the screen, click the *Request a document* button.

Select the type of requested document and enter information about the requested document.

Click *Close*.

All billing-related documents are available in the *Billing* tab. For more details, consult the View my billing section.

# View my forms and guides

Your **Administrator Centre** also helps to manage your group by bringing together practical guides and key forms to manage member files in one place.

## Access my forms and guides

In the vertical menu bar, click the *Forms and guides* tab.

The *Forms and guides* page appears. This page allows you to view all available forms and guides. Click the document to be viewed.

## Search

To filter the list, use the *Forms* or *Guides* buttons above the list.

In the top right corner of the screen, use the *Filter* icon to filter items.

Use the **Administrator Centre**'s messaging to send a form to Beneva.

Use **Administrator Centre** features for all change requests, whenever possible.

# Manage disability files

Easily access the various features allowing you to manage disability files.

Click the *Disability file administration* tile from your **Administrator Centre** home page.

## Features of the disability section

A section entirely dedicated to disability files brings all needed information and actions allowing you to manage your members' disability files in one place.

### Choose a group

In the header, search under the *Choose a group* search field for the group you want to manage.

The information displayed in the underlying tabs will be contextualized according to your selected group.

### Summary tab

This screen allows you to access:

- The most recent notifications regarding disability files for the selected group.
- The button allowing you to file a claim for benefits for one of the members of the selected group.
- Information allowing you to contact support as well as their opening hours.

## Search tab

A search tool is made available for you to find a member in the selected group allowing you to see all member’s general information.

## Documents tab

A centralized location where you can download disability forms and contract documents for your selected group.

## Notifications tab

A list of all disability files notifications for your selected group.

## Questions?

| Client and Customer Support Directory | |
|---|---|
| Plan Administrator Account Setup | ☎ 1-888-235-0680 (Select Option 4) |
| Your dedicated Service Representative | ☎ 1 855-747-7750 |
| Member Account Setup | ☎ 1-855-747-2233<br>• Creating /logging into account (Select Option 2)<br>• Adding product (Select Option 3)<br>• Help navigating website/app (Select Option 4)<br>• Other technical help (Select Option 5) |
| Customer service number for members | ☎ 1-855-747-7730 (Select Option 3)<br>• Have your certificate number ready to enter |