

Update Employer Information Page and Customer Account Page

Employer Information Page

Employer Information is the first step under the Configuration tab. It is separated into three sections with a link to the customer account page at the bottom of each section.

Main Tab

The main tab contains the demographic information for the client, contacts and enrollment options.

All fields should be completed. Information regarding the significance of certain items is noted.

The screenshot shows the 'Main' tab of the Employer Information page. It is divided into three sections: Address Information, Other Information, and Subscribers Allowed Login Access. Callouts provide context for several fields:

- Employer Name:** A callout states, "Employer Name drives the client's name in PlanSource".
- Address Fields:** A callout states, "The company address will pull on the employee confirmation statement".
- Situs State:** A callout states, "Situs State is important for the EULA.".

Address Information

Language: English (US) ▼

Employer Name: Timber Lakes

Address 1: [Redacted]

Address 2: [Redacted]

City / State / Zip: [Redacted] [Select a State] ▼ [Redacted]

County: [Redacted]

Country: [Redacted]

Other Information

Signed Agreement: 2017-02-03 12:50:50

EULA Agreement: [Redacted]

Situs State: Select a State ▼

Agent Name: [Redacted]

Administrator Name: [Redacted]

Enrollment Cost Period Text: Per Pay Period Use Payroll Name

SSN Mask Level: None ▼

- Require Dependent SSN
- Request Dependent Over 45 SSN
- Request Spouse SSN

Subscribers Allowed Login Access

- Active employee not on LOA
- Subscriber on state COBRA
- Subscriber on federal COBRA
- Retired employee of organization

Advanced Tab

The advanced tab is utilized to further customize the platform for the client.

The defaulted options are checked and the configuration analyst will adjust items if needed.

The project manager will complete two items on this page. The FEIN number and the max termination early and late days. Both are located toward the bottom of the page.

The screenshot shows the 'Advanced' configuration tab with the following sections and fields:

- Advanced options:** ID (1463298), Shard ID (0), Organization Code (timber_lakes).
- Content Management System:** PCMS (dropdown), Subscriber login:password, Org. Admin login:password, Logoff Return to URL (https://benefits.plansource.com), PCMS Subscriber Home Page, PCMS Organization Home Page, Show Employee Self Service in a browser frame (checked).
- UltiPro API Configuration:** Enable (unchecked), User API Key*, User Name*, Password*, Client Access key*, Login Service URL*, Api URL*, Real Time Processing (unchecked), Update Configuration button.
- Settings List:** Suppress All Emails, Suppress Employee Emails, Confirmation Statements (Email plaintext confirmation statements), Enable Admin Custom Page URL for Reports & Exports, Allow Foreground Reports (checked), Is Template, Is Master Org Template, Make Content Files Public, Copy Organization Master Org Administrators, Uses Ulti SSO, Broker (PlanSource University), Copied From Template (Mountain Creek Outfitters), Ceridian Import: include future effective dates, FEIN, External Reference ID, Zip password for downloaded report files, Max Termination Early Days, Max Termination Late Days, Enable Disclaimer, Benefit Eligible Organization Population (No Filter), Organization Billing Population (No Filter).

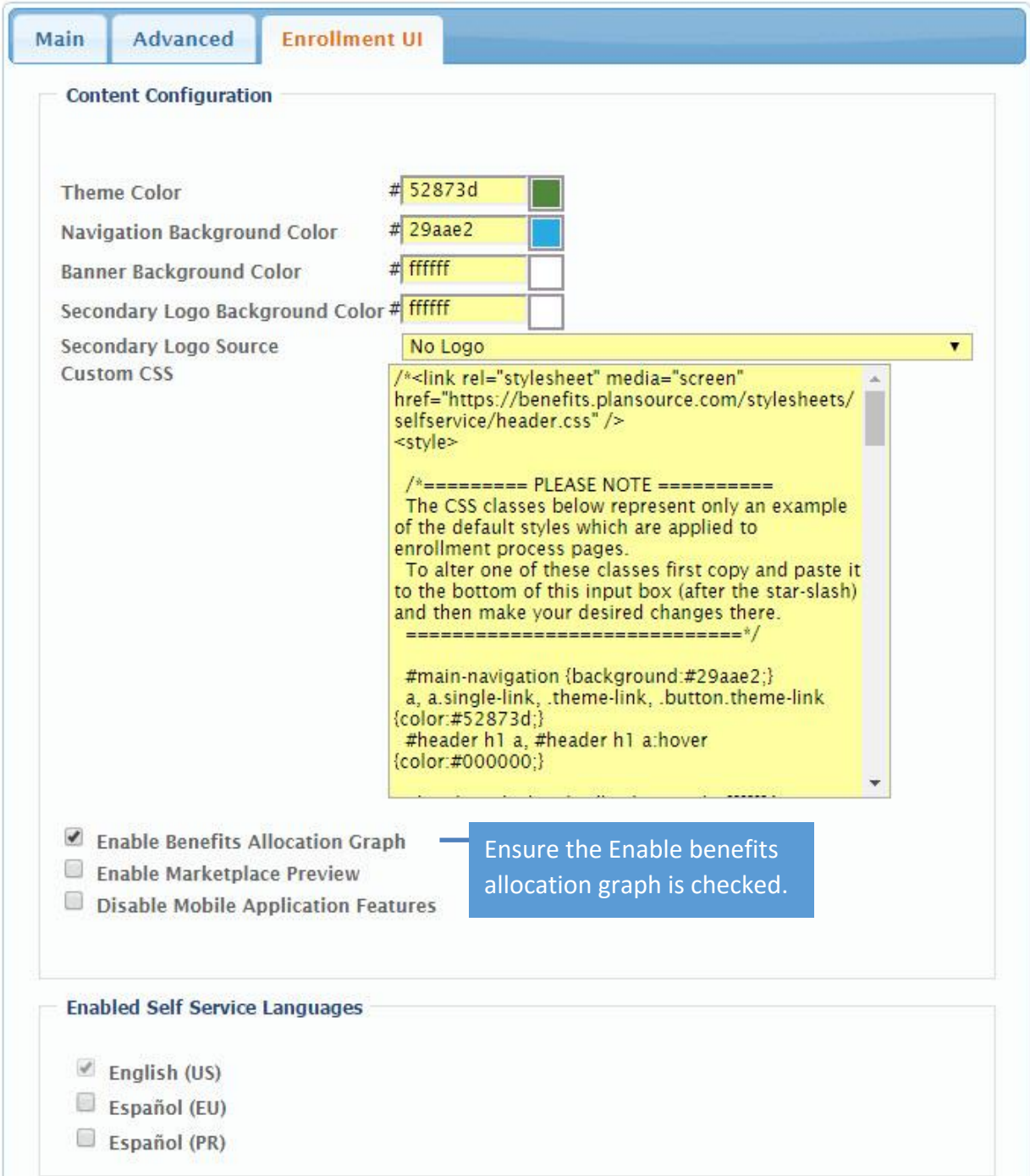
FEIN number

If the Max Termination Early and Late days are blank, utilize the default:
Early: 30
Late 90

Enrollment UI Tab

The enrollment UI tab will designate the branding colors for the client, enable the allocation graph and turn on the Spanish feature.

There is only one item for the project manager to update. Ensure the Benefits allocation graph is checked.



Main **Advanced** **Enrollment UI**

Content Configuration

Theme Color # 52873d

Navigation Background Color # 29aae2

Banner Background Color # fffffff

Secondary Logo Background Color # fffffff

Secondary Logo Source No Logo

Custom CSS

```
/*<link rel="stylesheet" media="screen"
href="https://benefits.plansource.com/stylesheets/
selfservice/header.css" />
<style>

/*===== PLEASE NOTE =====
The CSS classes below represent only an example
of the default styles which are applied to
enrollment process pages.
To alter one of these classes first copy and paste it
to the bottom of this input box (after the star-slash)
and then make your desired changes there.
=====*/

#main-navigation {background:#29aae2;}
a, a.single-link, .theme-link, .button.theme-link
{color:#52873d;}
#header h1 a, #header h1 a:hover
{color:#000000;}
```

Enable Benefits Allocation Graph

Enable Marketplace Preview

Disable Mobile Application Features

Enabled Self Service Languages

English (US)

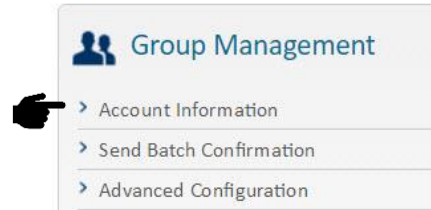
Español (EU)

Español (PR)


Ensure the Enable benefits allocation graph is checked.

Customer Account Information Page

The customer account information page can be accessed from the home page under Group Management. It is also located at the bottom of any of the three tabs under Employer Information.














Information to be updated

Required fields are designated with 

General | Client Billing

General

Broker ID	B201
Broker Name	PlanSource University
Contract Name	<input type="text"/> 
Client ID	C1463298
Client Folder Path	<input type="text"/> 
Direct Contact with Client	Yes 
Account Manager	<input type="text"/> 
PlanSource Sales Rep	<input type="text"/> 
Solutions Consultant	<input type="text"/> 
Organization Status	Demo 
Expected EE Count	<input type="text"/> 
Actual EE Count	7
Automatically Calculated	
Number of New Lines	<input type="text"/>
Populate for all PSA partner accounts	
Number of Renewal Lines	<input type="text"/>
Populate for all PSA partner accounts	
Model	<input type="text"/> 
Contract Type	<input type="text"/> 
Satisfaction Score	<input type="text"/>
Referenceable	Unknown 

PSA Partners

	Starts On	Ends On
Aetna - AZ OneMarket	<input type="checkbox"/>	
Aetna - CA	<input type="checkbox"/>	
Aetna - CA OneMarket	<input type="checkbox"/>	
Aetna - National OneMarket	<input type="checkbox"/>	
Aetna - SE	<input type="checkbox"/>	
Anthem - CA	<input type="checkbox"/>	

 Complete this section if the client has a PSA partner

Customer Account Information Page Continued

Implementation

Setup Done By	<input type="text" value=""/>		
Implementation specialist	<input type="text" value=""/>		
Implementation Start Date	<input type="text" value=""/>		
Target Go Live Date	<input type="text" value=""/>		
Revised Target Go Live Date	<input type="text" value=""/>		
Actual Go Live Date	<input type="text" value=""/>		
Live for Annual Enrollment	Yes <input type="text"/>		
Broker On-Boarding Complexity	<input type="text" value=""/>		
Implementation Complexity	<input type="text" value=""/>		
Renewal Complexity	<input type="text" value=""/>		
Date Implementation went on Hold	<input type="text" value=""/>		
Expected Ongoing Transition Date	<input type="text" value=""/>		
Actual Transition Date	<input type="text" value=""/>		
To be completed by Service Team Manager			

This field is updated after the kick off call

Fees

Setup fee	<input type="text" value=""/>	
Setup fee billed on	<input type="text" value=""/>	
To be completed by Billing Specialist		

System Functionality Utilized

Employee Self Service	<input type="checkbox"/>
InfoCenter (Customized Content)	<input type="checkbox"/>
New Hire Processing	<input type="checkbox"/>
Plan Comparisons	<input type="checkbox"/>
Premium Billing	<input type="checkbox"/>
Work Status Events	<input type="checkbox"/>

Other Products

	Starts On	Ends On
Aflac	<input type="checkbox"/>	
Allstate	<input type="checkbox"/>	
Ben Admin - NGE	<input type="checkbox"/>	
COBRA - AHA	<input type="checkbox"/>	
COBRA - Igoe	<input type="checkbox"/>	

Complete this section if the client is utilizing additional products.