

# SmartOffice®

Training



## Group Benefits Module

© 2004. E-Z Data, Inc. All rights reserved. SmartOffice is a registered trademark of E-Z Data, Inc.

# Group Census

## Overview

Employee Census information for a business is located on the Employee Census tab in the Business Contact module. This tab tracks the detailed employee information for the current business.

The first column hyperlink is reserved to open the Employee Census Information dialog box. If the Contact Name is not the first column, then the contact details will open when the Contact Name hyperlink is selected.

**ABC Manufacturing**

Summary | Business (P) | Add'l Business Info | Key Relations | Employee Census | Benefit | Asset Allocation (X) | Group Benefits | >>

Employee Class	Contact Name	DOB	Hire Date	Total Salary
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Antille, Eugene	12/16/1956	05/14/1993	85,000
<input type="checkbox"/> Class 2 - Managers	Ernst, Rosemary	09/19/1959	03/15/1995	85,000
<input type="checkbox"/> Class 2 - Managers	Hamamoto, Tsuyako	02/10/1955	08/04/1998	55,000
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Horley, Elan A.	11/10/1979	05/14/1993	120,000
<input type="checkbox"/> Class 3 - All Others	Johnson, Rochelle	10/06/1970	06/20/1998	41,000
<input type="checkbox"/> Class 3 - All Others	Porter, Steve	03/02/1970	08/14/1999	55,000
<input type="checkbox"/> Class 3 - All Others	Riviera, Carlos	01/31/1960	07/26/1996	63,000
<input type="checkbox"/> Class 3 - All Others	Smith, John	01/22/1973	05/21/1999	45,000

Records Shown: 8 Total Records: 8

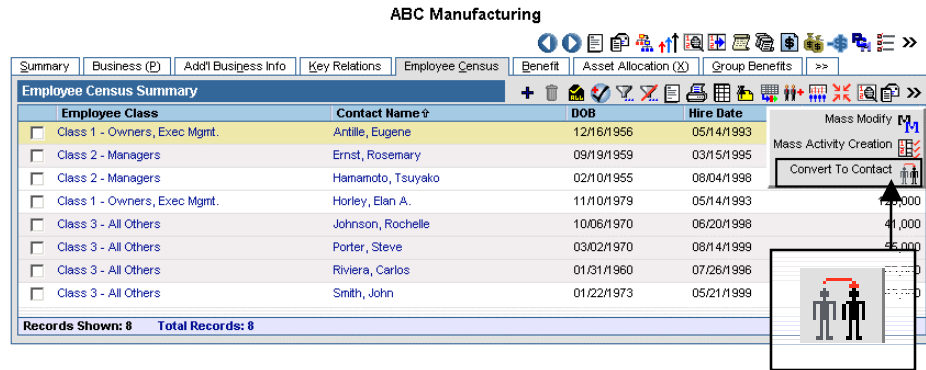
Employees in white have full contact records in addition to the employee census information.

<input type="checkbox"/> Class 2 - Managers	Ernst, Rosemary	09/19/1959	03/15/1995	85,000
<input type="checkbox"/> Class 2 - Managers	Hamamoto, Tsuyako	02/10/1955	08/04/1998	55,000
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Horley, Elan A.	11/10/1979	05/14/1993	120,000
<input type="checkbox"/> Class 3 - All Others	Johnson, Rochelle	10/06/1970	06/20/1998	41,000

Employees in gray are employee census records only and will not be seen in the Global Contact Summary unless specified otherwise.

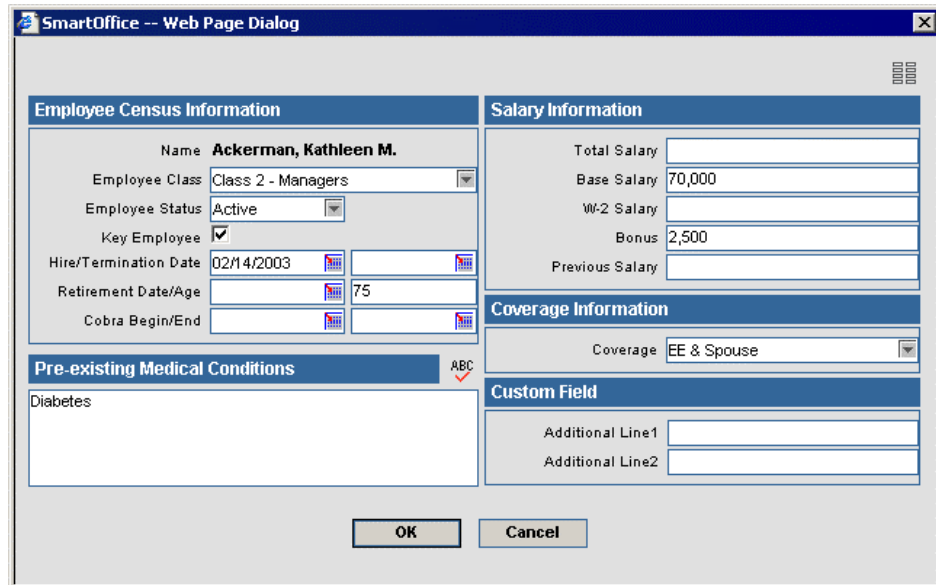
<input type="checkbox"/> Class 2 - Managers	Ernst, Rosemary	09/19/1959	03/15/1995	85,000
<input type="checkbox"/> Class 2 - Managers	Hamamoto, Tsuyako	02/10/1955	08/04/1998	55,000
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Horley, Elan A.	11/10/1979	05/14/1993	120,000
<input type="checkbox"/> Class 3 - All Others	Johnson, Rochelle	10/06/1970	06/20/1998	41,000

To convert an employee census record to a full contact record click **Convert to Contact**.

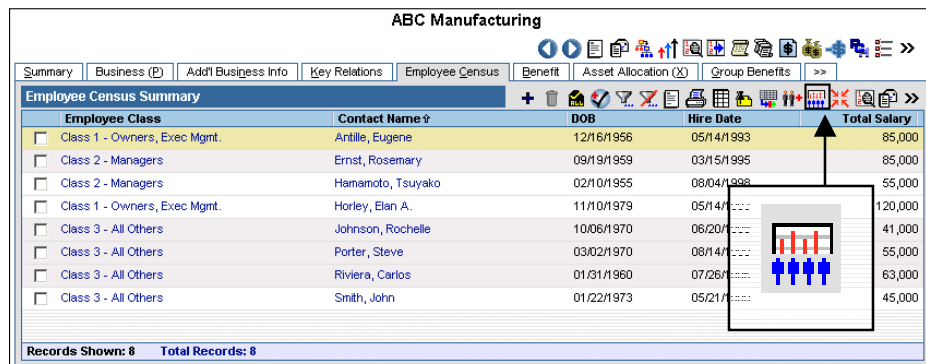


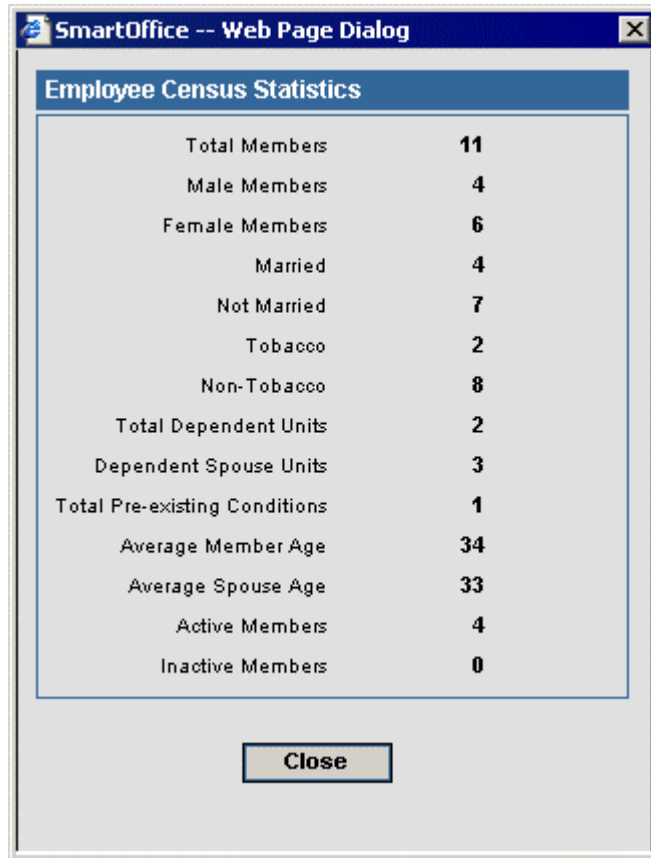
To modify employee census information, click the first column hyperlink. This will open the Employee Census Information dialog box.

After making the appropriate changes, click **OK** to save those changes and to close the Employee Census Information dialog box.



For a quick view of employee statistics for the business click **Show Employee Statistics**. These statistics are pulled from the Employee Census tab.

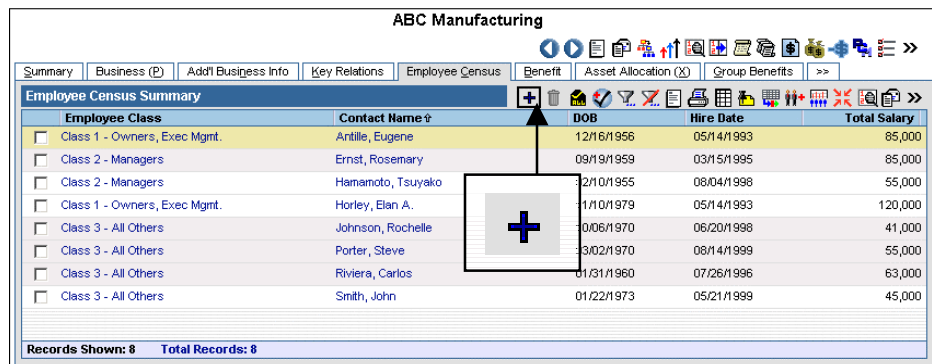




### Adding a member to the Group Census

It is necessary to add a member to the Group Census before you can add them to a group policy.

Step 1: Click Add.



SmartOffice asks whether to add employee census information to an existing contact or to create a new employee census member. In other words, does the employee have a contact record that already exists in SmartOffice or will the employee only be available as a census member record?

**Step 2: Specify which type of contact the employee will be.**

SmartOffice -- Web Page Dialog

**Employee Census Add Option.**

Add Employee Census Information for an Existing Contact.

Create New Employee Census Member.

OK Cancel

© 2000-2004 E-Z Data, Inc. All rights reserved.

**Step 3: Enter Census Member data.**

- If Choice One: The Search Individual Contact dialog box opens. Search for the contact to add to the employee census. Once the contact is selected, the Employee Census Information dialog box opens. Census information for the contact is entered here.
- If Choice Two: New – Individual Contact dialog box opens with **Type** set to *Employee Census*. Once the contact has been added to the census, click the first column hyperlink to open the Employee Census Information dialog box. Census information for the contact is entered here.

**Step 4: After entering the census data, click OK to save and to close the Employee Census Information dialog box.**

SmartOffice -- Web Page Dialog

Employee Census Information	Salary Information
Name: <b>Ackerman, Kathleen M.</b>	Total Salary: <input type="text"/>
Employee Class: Class 2 - Managers	Base Salary: 70,000
Employee Status: Active	W-2 Salary: <input type="text"/>
Key Employee: <input checked="" type="checkbox"/>	Bonus: 2,500
Hire/Termination Date: 02/14/2003	Previous Salary: <input type="text"/>
Retirement Date/Age: <input type="text"/> 75	
Cobra Begin/End: <input type="text"/> <input type="text"/>	
	Coverage Information
	Coverage: EE & Spouse
Pre-existing Medical Conditions	Custom Field
Diabetes	Additional Line1: <input type="text"/>
	Additional Line2: <input type="text"/>


OK Cancel

## Attaching an Employee to a Group Policy

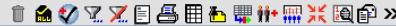
This is one of the two ways a group census member can be attached to an existing group policy. Please refer to the Group Policy section of this document.

Step 1: Tag the group census member(s) to be added to an existing group policy.

**ABC Manufacturing**



Summary Business (P) Add'l Business Info Key Relations Employee Census Benefit Asset Allocation (X) Group Benefits >>


**Employee Census Summary** + 

Employee Class	Contact Name	DOB	Hire Date	Total Salary
<input checked="" type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Antille, Eugene	12/16/1956	05/14/1993	85,000
<input checked="" type="checkbox"/> Class 2 - Managers	Ernst, Rosemary	09/19/1959	03/15/1995	85,000
<input checked="" type="checkbox"/> Class 2 - Managers	Hamamoto, Tsuyako	02/10/1955	08/04/1998	55,000
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Horley, Elan A.	11/10/1979	05/14/1993	120,000
<input type="checkbox"/> Class 3 - All Others	Johnson, Rochelle	10/06/1970	06/20/1998	41,000
<input type="checkbox"/> Class 3 - All Others	Porter, Steve	03/02/1970	08/14/1999	55,000
<input type="checkbox"/> Class 3 - All Others	Riviera, Carlos	01/31/1960	07/26/1996	63,000
<input type="checkbox"/> Class 3 - All Others	Smith, John	01/22/1973	05/21/1999	45,000


Records Shown: 8 Total Records: 8

Step 2: Click the Add Members to Group Policy button.

**ABC Manufacturing**

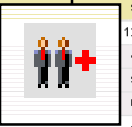


Summary Business (P) Add'l Business Info Key Relations Employee Census Benefit Asset Allocation (X) Group Benefits >>

**Employee Census Summary** + 

Employee Class	Contact Name	DOB	Hire Date	Total Salary
<input checked="" type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Antille, Eugene	12/16/1956	05/14/1993	85,000
<input checked="" type="checkbox"/> Class 2 - Managers	Ernst, Rosemary	09/19/1959	03/15/1995	85,000
<input checked="" type="checkbox"/> Class 2 - Managers	Hamamoto, Tsuyako	02/10/1955	08/04/1998	55,000
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Horley, Elan A.	11/10/1979	05/14/1993	120,000
<input type="checkbox"/> Class 3 - All Others	Johnson, Rochelle	10/06/1970	06/20/1998	41,000
<input type="checkbox"/> Class 3 - All Others	Porter, Steve	03/02/1970	08/14/1999	55,000
<input type="checkbox"/> Class 3 - All Others	Riviera, Carlos	01/31/1960	07/26/1996	63,000
<input type="checkbox"/> Class 3 - All Others	Smith, John	01/22/1973	05/21/1999	45,000

Records Shown: 8 Total Records: 8



The Search Group Policy dialog box opens.

Step 3: Search for and select the appropriate group policy.

SmartOffice -- Web Page Dialog

### Search Group Policies

Business Name

Policy #

Case Unique ID

Product

Carrier

Primary Advisor

Insurance Type All

Policy Status All

Priority All

### Filter

Filter

Search Close

The Group Plan Summary dialog box opens listing the plans associated with the policy.

Step 4: Select the appropriate plan.

SmartOffice -- Web Page Dialog

### Group Plan Summary

+ [Print] [Delete]

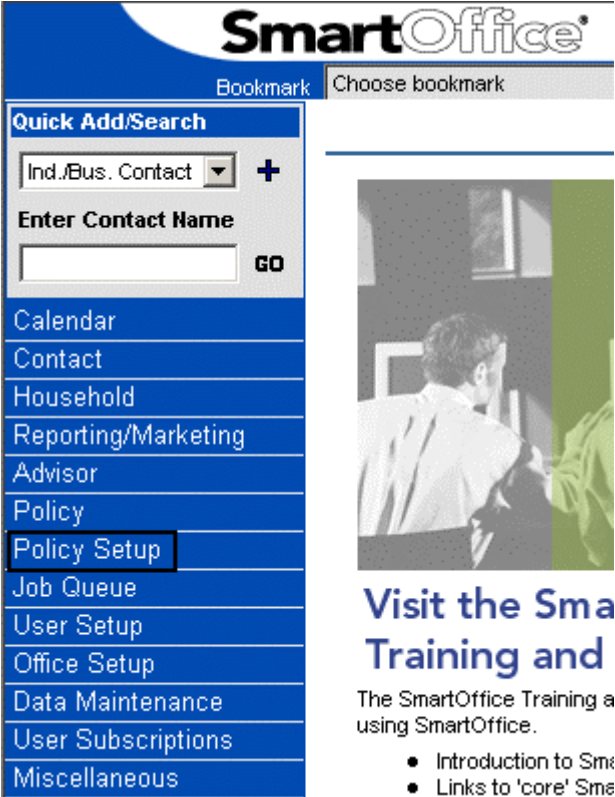
Plan Name
HMO
PPO

Close

# Group Product

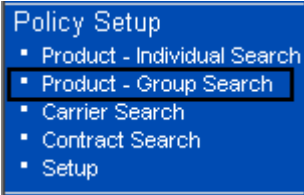
Before a Group Policy can be added, the Group Product information needs to be entered. Once the product is in SmartOffice you can use it for multiple policies and will not have to enter it a second time.

## Group Product Search



Step 1: Click the Policy Setup link located on the side menu of SmartOffice. If the user has a PCM license, then the Policy Setup link will be called Policy/PCM Setup instead.

Step 2: Select Product – Group Search underneath the Policy Setup link.





Step 3: Enter search criteria and click Search. All group products will display if no criteria is entered.

The image shows a web dialog box titled "SmartOffice -- Web Page Dialog" with a close button in the top right corner. The main heading is "Search Group Insurance Product". Below this, there are four input fields: "Product Name" (text box), "Carrier" (text box), "Product Type" (dropdown menu with "All" selected), and "Product Status" (dropdown menu with "All" selected). Below these fields is a section titled "Filter" with a "Filter" text box. At the bottom of the dialog are two buttons: "Search" and "Close".

## Group Product Summary

To open the Group Product Summary, perform a Group Product Search.

Group Product Summary

Product Type: All

Summary | Detail (D) | Group Plan Summary | Group Policy

Type	Product Name	Symbol	Carrier Name
<input type="checkbox"/> A D & D	Brightstar 50	FC9123787-01	Colony Life
<input type="checkbox"/> Group Dental	Primary Care Dental Plus	BCD001	Blue Health Care
<input type="checkbox"/> Group Dental	Prudent Buyer Dental	BSD01	Blue Medical
<input type="checkbox"/> Group Life	Value 90	ALL01	ABC Life
<input type="checkbox"/> Group LTC	Sentinel 100	BS012381-002	Blue Sky Mutual
<input type="checkbox"/> LTD	Maximum Shield	BS71829-009A	Blue Medical
<input type="checkbox"/> Group Medical	Primary Care Medical Plus	BCM01	Blue Health Care
<input type="checkbox"/> Group Medical	Prudent Buyer	BSM01	Blue Medical
<input type="checkbox"/> Retirement	New Horizon 60	NH302001-009	Nations Life Insurance
<input type="checkbox"/> STD	Work Companion	CLHSTD001	California Life & Health
<input type="checkbox"/> Travel	Travel Shield	TS123919-01B	United Community Life & Accident
<input type="checkbox"/> Group Vision	20/20 Care	BCV01	Blue Health Care
<input type="checkbox"/> Section 125	Section 125 Plan	S-125	Blue Medical

Records Shown: 13 Total Records: 13

Use the Product Type drop-down list at the top of the summary to easily filter for the type of product that you are interested in. By default all types are listed.

**Group Product Summary**

Product Type: All

Summary | Detail (P) | Group Plan Summary | Group Policy

Type	Product Name	Symbol	Carrier Name
<input type="checkbox"/> A D & D	Brightstar 50	FC9123787-01	Colony Life
<input type="checkbox"/> Group Dental	Primary Care Dental Plus	BCD001	Blue Health Care
<input type="checkbox"/> Group Dental	Prudent Buyer Dental	BSD01	Blue Medical
<input type="checkbox"/> Group Life	Value 90	ALL01	ABC Life
<input type="checkbox"/> Group LTC	Sentinel 100	BS012381-002	Blue Sky Mutual
<input type="checkbox"/> LTD	Maximum Shield	BS71829-009A	Blue Medical
<input type="checkbox"/> Group Medical	Primary Care Medical Plus	BCM01	Blue Health Care
<input type="checkbox"/> Group Medical	Prudent Buyer	BSM01	Blue Medical
<input type="checkbox"/> Retirement	New Horizon 60	NH302001-009	Nations Life Insurance
<input type="checkbox"/> STD	Work Companion	CLHSTD001	California Life & Health
<input type="checkbox"/> Travel	Travel Shield	TS123919-01B	United Community Life & Accident
<input type="checkbox"/> Group Vision	20/20 Care	BCV01	Blue Health Care
<input type="checkbox"/> Section 125	Section 125 Plan	S-125	Blue Medical

Records Shown: 13 Total Records: 13

However, if Group Medical is chosen, only the medical products will remain.

**Group Product Summary**

Product Type: Group Medical

Summary | Detail (P) | Group Plan Summary | Group Policy

Type	Product Name	Symbol	Carrier Name
<input checked="" type="checkbox"/> Group Medical	Primary Care Medical Plus	BCM01	Blue Health Care
<input checked="" type="checkbox"/> Group Medical	Prudent Buyer	BSM01	Blue Medical

Records Shown: 2 Total Records: 2

To select one or more products, tag the checkboxes next to them.

**Group Product Summary**

Product Type: All

Summary | Detail (P) | Group Plan Summary | Group Policy

Type	Product Name	Symbol	Carrier Name
<input checked="" type="checkbox"/> A D & D	Brightstar 50	FC9123787-01	Colony Life
<input checked="" type="checkbox"/> Group Dental	Primary Care Dental Plus	BCD001	Blue Health Care
<input checked="" type="checkbox"/> Group Dental	Prudent Buyer Dental	BSD01	Blue Medical
<input type="checkbox"/> Group Life	Value 90	ALL01	ABC Life
<input type="checkbox"/> Group LTC	Sentinel 100	BS012381-002	Blue Sky Mutual
<input type="checkbox"/> LTD	Maximum Shield	BS71829-009A	Blue Medical
<input checked="" type="checkbox"/> Group Medical	Primary Care Medical Plus	BCM01	Blue Health Care
<input checked="" type="checkbox"/> Group Medical	Prudent Buyer	BSM01	Blue Medical
<input type="checkbox"/> Retirement	New Horizon 60	NH302001-009	Nations Life Insurance
<input type="checkbox"/> STD	Work Companion	CLHSTD001	California Life & Health
<input type="checkbox"/> Travel	Travel Shield	TS123919-01B	United Community Life & Accident
<input type="checkbox"/> Group Vision	20/20 Care	BCV01	Blue Health Care
<input type="checkbox"/> Section 125	Section 125 Plan	S-125	Blue Medical

Records Shown: 13 Total Records: 13

For a quick view of group policy statistics for the selected Products click the Group Product Policy Statistics button.

**Group Product Summary**

Product Type: All

Summary | Detail (P) | Group Plan Summary | Group Policy

Type	Product Name	Symbol	Carrier Name	
<input checked="" type="checkbox"/>	A D & D	Brightstar 50	FC9123787-01	Colony Life
<input checked="" type="checkbox"/>	Group Dental	Primary Care Dental Plus	BCD001	Blue Health Care
<input checked="" type="checkbox"/>	Group Dental	Prudent Buyer Dental	BSD01	Blue Medical
<input type="checkbox"/>	Group Life	Value 90	ALL01	ABC Life
<input type="checkbox"/>	Group LTC	Sentinel 100	BS012381-002	Blue Sky Mutual
<input type="checkbox"/>	LTD	Maximum Shield	BS71829-009A	Blue Medical
<input checked="" type="checkbox"/>	Group Medical	Primary Care Medical Plus	BCM01	Blue Health Care
<input checked="" type="checkbox"/>	Group Medical	Prudent Buyer	BSM01	Blue Medical
<input type="checkbox"/>	Retirement	New Horizon 60	NH302001-009	Nations Life Insurance
<input type="checkbox"/>	STD	Work Companion	CLHSTD001	California Life & Health
<input type="checkbox"/>	Travel	Travel Shield	TS123919-01B	United Community Life & Accident
<input type="checkbox"/>	Group Vision	20/20 Care	BCV01	Blue Health Care
<input type="checkbox"/>	Section 125	Section 125 Plan	S-125	Blue Medical

Records Shown: 43 Total Records: 13

SmartOffice -- Web Page Dialog

**Policy Statistics by Group Product**

<b>Number of Cases</b>	<b>16</b>
<b>Average Premium</b>	<b>35,544.00</b>
<b>Maximum Premium</b>	<b>450,000.00</b>
<b>Total Premium</b>	<b>568,704.00</b>

Close

### Group Detail Tab

Open the Detail tab to see further information about a group product.

**Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care**

Summary | Detail (P) | Group Plan Summary | Group Policy

Group Product Information	Remarks
Group Ins Type: <b>Group Medical</b> Product Name: <b>Primary Care Medical Plus</b> Code: <b>BCM01</b> Carrier: <b>Blue Health Care</b>	
Product Validity Parameters	
Effective: <b>01/01/2002</b> Expiration:	

The Group Product Information section tracks the type, name, code, and carrier of the product.

Group Product Information	
Group Ins Type	Group Medical
Product Name	Primary Care Medical Plus
Code	BCM01
Carrier	Blue Health Care

Any additional remarks about the product can be tracked in the Remarks section.

Remarks
This Product is our most popular seller.

The Product Validity Parameters section tracks when the product became valid and when it will expire. This section is for informational purposes only.

Product Validity Parameters	
Effective	01/01/2002
Expiration	

### Group Policy Tab

The Group Policy Tab displays a list of the group policies associated with the current product.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care						
Summary   Detail (P)   Group Plan Summary   Group Policy						
Insurance Type		Policy Stage				
Type	Business Name	Carrier Name	Product Name	As Of Date	ER	Contributi
<input type="checkbox"/> Group Medical	Tax Tech, Inc.	Blue Health Care	Primary Care Medical Plus	09/10/2001	100%	
<input type="checkbox"/> Group Medical	ABC Manufacturingx	Blue Health Care	Primary Care Medical Plus	12/31/2001	100%	
<input type="checkbox"/> Group Medical	ABC Manufacturingx	Blue Health Care	Primary Care Medical Plus			

Records Shown: 3    Total Records: 3

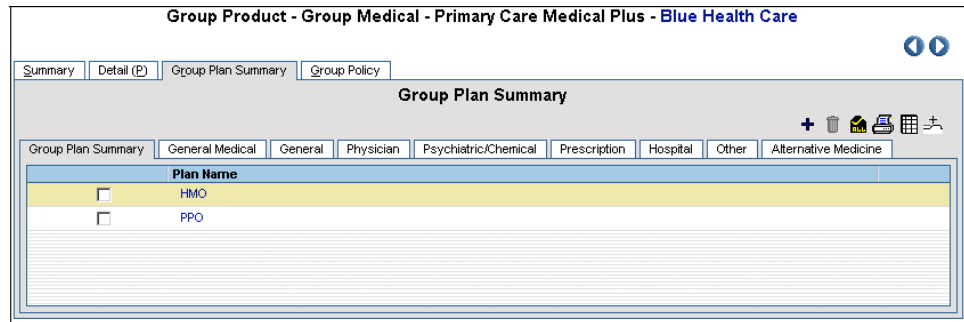
Use the drop-down lists at the top of the spreadsheet to filter by Insurance Type and Policy Stage.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care						
Summary   Detail (P)   Group Plan Summary   Group Policy						
Insurance Type		Policy Stage				
Type	Business Name	Carrier Name	Product Name	As Of Date	ER	Contributi
<input type="checkbox"/> Group Medical	Tax Tech, Inc.	Blue Health Care	Primary Care Medical Plus	09/10/2001	100%	
<input type="checkbox"/> Group Medical	ABC Manufacturingx	Blue Health Care	Primary Care Medical Plus	12/31/2001	100%	
<input type="checkbox"/> Group Medical	ABC Manufacturingx	Blue Health Care	Primary Care Medical Plus			

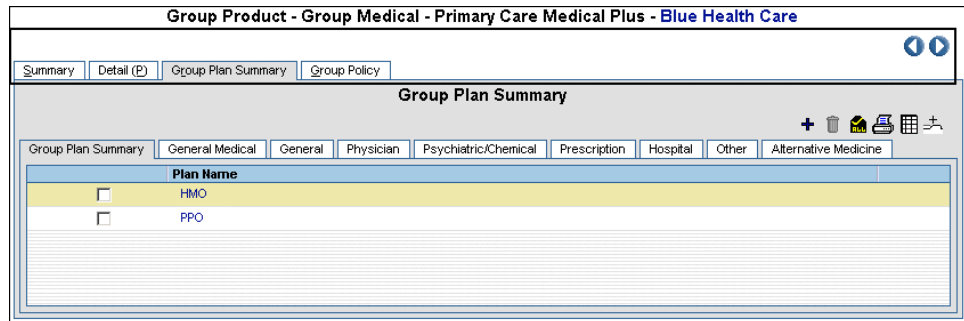
Records Shown: 3    Total Records: 3

## Group Plan Summary Tab

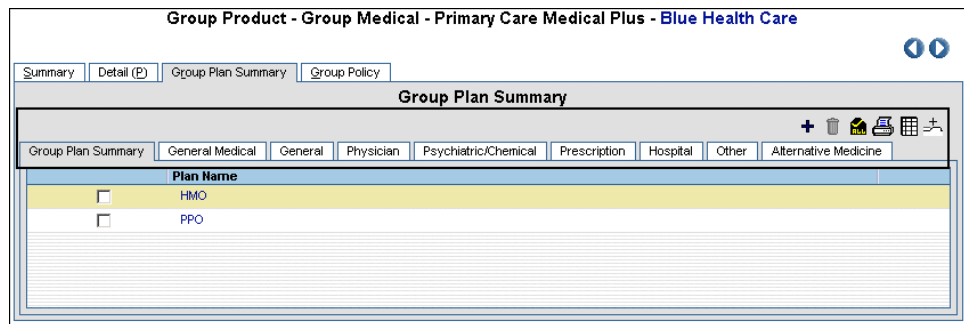
The Group Plan Summary tab lists the product's associated plans.



The top set of tabs and buttons belong to the current Product.



The bottom set of tabs and buttons belong to the current plan. The bottom sets of tabs are called Categories. The categories will be different depending on the type of product.



The Plan Name is stored on General Medical Category.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care

Summary | Detail (P) | Group Plan Summary | Group Policy

Group Plan Detail - HMO

Group Plan Summary | General Medical | General | Physician | Psychiatric/Chemical | Prescription | Hospital | Other | >>

Plan Name

Plan Name HMO

View general information such as the Annual Deductible and Annual Copay on the General Category. In this example the annual copay for an individual is 1,000 dollars for an in-network doctor and 2,000 dollars for a doctor not out of network.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care

Summary | Detail (P) | Group Plan Summary | Group Policy

System: General

Group Plan Summary | General Medical | General | Physician | Psychiatric/Chemical | Prescription | Hospital | Other | >>

Group Category Data Summary

Sub-Category Name	In Network	Out Network	Special/Other
Annual Deductible - Indiv	1000	2000	
Annual Deductible - Family	3000	5000	
Annual Copay - Indiv.	200	300	
Annual Copay - Family	500	800	
Lifetime Maximum			
Primary Care Physician Req.			Yes
Claim Forms Required			No
Pre-Existing Cond. Limits			None

Each entry inside of a category is called a sub-category. To change a sub-category's details, click the first-column hyperlink of the appropriate sub-category.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care

Summary | Detail (P) | Group Plan Summary | Group Policy

System: General

Group Plan Summary | General Medical | General | Physician | Psychiatric/Chemical | Prescription | Hospital | Other | >>

Group Category Data Summary

Sub-Category Name	In Network	Out Network	Special/Other
Annual Deductible - Indiv	1000	2000	
Annual Deductible - Family	3000	5000	
Annual Copay - Indiv.	200	300	
Annual Copay - Family	500	800	
Lifetime Maximum			
Primary Care Physician Req.			Yes
Claim Forms Required			No
Pre-Existing Cond. Limits			None

Make the changes and click the OK button to save and close the sub-category.

SmartOffice -- Web Page Dialog

**Group Category Information**

Group Category Name: **General**

Group Sub-Category Name: **Annual Deductible - Indiv**

In Network:

Out of Network:

Special/Other:

OK Cancel

Use the Physician, Psychiatric / Chemical, Prescription, Hospital, and Other categories for additional deductibles.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Group Plan Summary Group Policy

System: General

Group Plan Summary General Medical General Physician Psychiatric/Chemical Prescription Hospital Other

**Group Category Data Summary**

Sub-Category Name	In Network	Out Network	Special/Other
Annual Deductible - Indiv	1000	2000	
Annual Deductible - Family	3000	5000	
Annual Copay - Indiv.	200	300	
Annual Copay - Family	500	800	
Lifetime Maximum			
Primary Care Physician Req.			Yes
Claim Forms Required			No
Pre-Existing Cond. Limits			None

More than deductibles can be tracked in sub-categories. For example, this plan requires a primary care physician, does not require claim forms, and has no pre-existing condition limits.

Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Group Plan Summary Group Policy

System: General

Group Plan Summary General Medical General Physician Psychiatric/Chemical Prescription Hospital Other >>

Group Category Data Summary

Sub-Category Name	In Network	Out Network	Special/Other
Annual Deductible - Indiv	1000	2000	
Annual Deductible - Family	3000	5000	
Annual Copay - Indiv.	200	300	
Annual Copay - Family	500	800	
Lifetime Maximum			
Primary Care Physician Req.			Yes
Claim Forms Required			No
Pre-Existing Cond. Limits			None

### Adding a New Category

Step 1: Click the Group Category Setup button.


Group Product - Group Medical - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Group Plan Summary Group Policy

Group Plan Summary

Group Plan Summary General Medical General Physician Psychiatric/Chemical Prescription Hospital Other Alternative Medicine

Plan Name
<input type="checkbox"/> HMO
<input type="checkbox"/> PPO

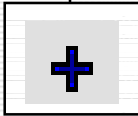


Step 2: This opens the Group Category Setup Summary screen. Because no new categories have been entered yet, the summary is blank. Click the Add button.

SmartOffice -- Web Page Dialog

Group Category Setup Summary

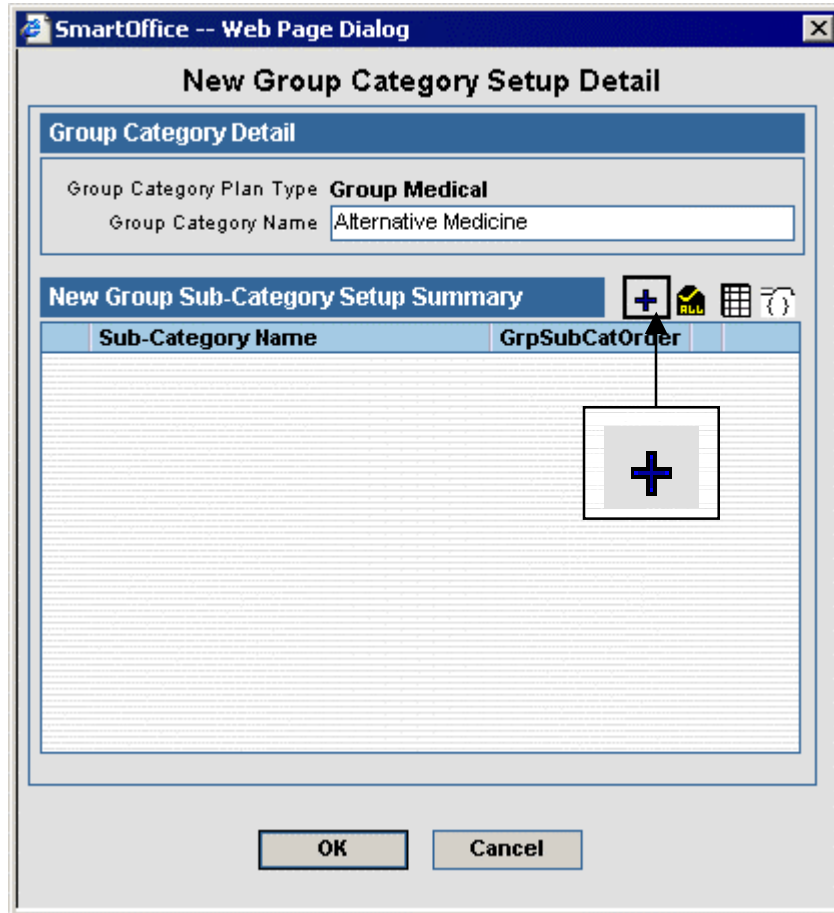
Group Category Name	Plan Type	Group Category Order



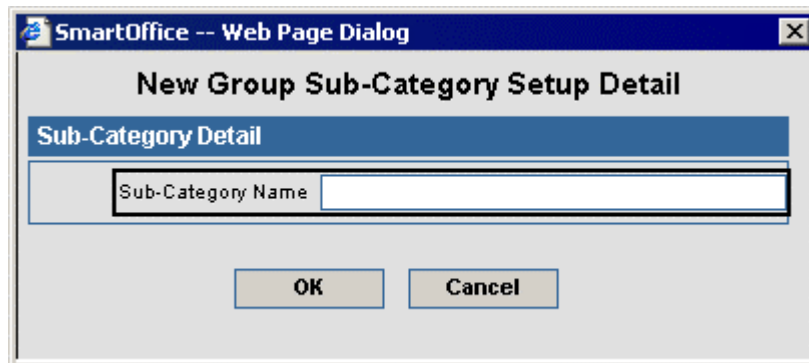




Step 4: Click the Add button in the New Group Sub-Category Setup Summary to add a sub-category to the new category.



Step 5: Enter the name of the new sub-category into the Sub-Category Name field.

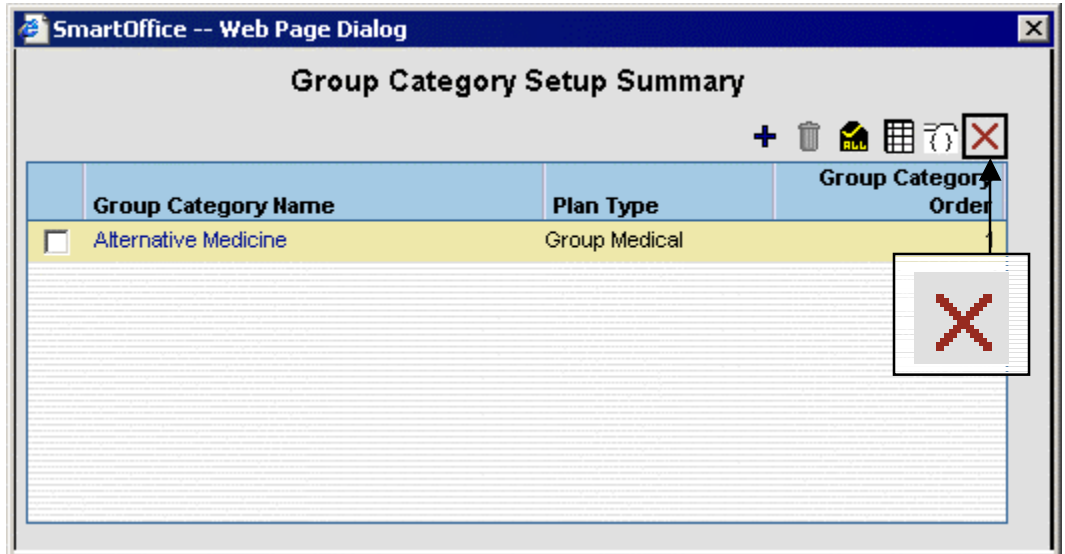


Step 6: Click OK to save and close the new sub-category.

Step 6: Once finished entering sub-categories, click Close to save and close the new category.

Sub-Category Name	GrpSubCatOrder
<input type="checkbox"/> Acupuncture	1

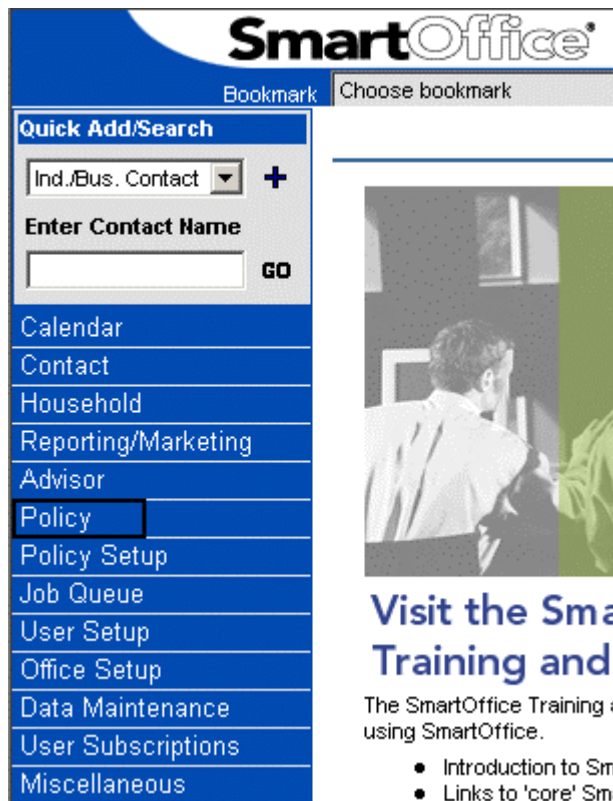
Step 7: Once finished entering categories, click the Close button to save and close the new category.



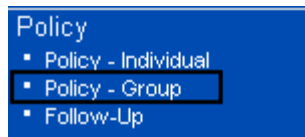
# Group Policy

Before a Group Policy can be added, the Group Product information needs to be entered. Once the product is in SmartOffice you can use it for multiple policies and will not have to enter it a second time.

## Group Policy Search



Step 1: Click the Policy link located on the side menu of SmartOffice.



Step 2: Select Policy – Group underneath the Policy link.

Step 3: Enter search criteria and click Search. All group policies will display if no criteria is entered.

The image shows a web dialog box titled "SmartOffice -- Web Page Dialog" with a sub-header "Search Group Policies". It contains several input fields for search criteria: Business Name, Policy #, Case Unique ID, Product, Carrier, Primary Advisor, Insurance Type (dropdown menu), Policy Status (dropdown menu), and Priority (dropdown menu). Below these fields is a "Filter" section with a text input field. At the bottom of the dialog are three buttons: "Search", "Add", and "Close".

### Group Policy Summary

To open the Group Policy Summary, perform a group policy search.

Group Policy Summary

Insurance Type: All Policy Stage: All

Summary | Detail (D) | Plan Summary | Letters/Documents

Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	02/03/2001
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	12/10/2001
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	01/05/2001
<input type="checkbox"/> Retirement	ABC Manufacturing	Nations Life Insurance	02/05/2001
Subtotal: Business Name - ABC Manufacturing (5)			
<b>Business Name - Ace Building</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> STD	Ace Building	California Life & Health	10/06/2001
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<input type="checkbox"/> A & D	Ace Building	Colony Life	10/06/2001
Subtotal: Business Name - Ace Building (7)			
<b>Business Name - Plato Tea Importers</b>			
<input type="checkbox"/> Group LTC	Plato Tea Importers	Blue Sky Mutual	09/10/2001
Records Shown: 19 Total Records: 19			

Use the Insurance Type drop-down list at the top of the summary to easily filter for the type of policy that you are interested in. By default all types are listed.

Group Policy Summary			
Insurance Type	All	Policy Stage	All
Summary   Detail (D)   Plan Summary   Letters/Documents			
Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	02/03/2001
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	12/10/2001
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	01/05/2001
<input type="checkbox"/> Retirement	ABC Manufacturing	Nations Life Insurance	02/05/2001
Subtotal: Business Name - ABC Manufacturing (5)			
<b>Business Name - Ace Building</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> STD	Ace Building	California Life & Health	10/06/2001
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<input type="checkbox"/> A D & D	Ace Building	Colony Life	10/06/2001
Subtotal: Business Name - Ace Building (7)			
<b>Business Name - Plato Tea Importers</b>			
<input type="checkbox"/> Group LTC	Plato Tea Importers	Blue Sky Mutual	09/10/2001
Records Shown: 19 Total Records: 19			

However, if Group Medical is chosen, only the medical policies will remain.

Group Policy Summary			
Insurance Type	Group Medical	Policy Stage	All
Summary   Detail (D)   Plan Summary   Letters/Documents   Custom			
Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input checked="" type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
Subtotal: Business Name - ABC Manufacturing (1)			
<b>Business Name - Ace Building</b>			
<input checked="" type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
Subtotal: Business Name - Ace Building (1)			
<b>Business Name - Tax Tech, Inc.</b>			
<input checked="" type="checkbox"/> Group Medical	Tax Tech, Inc.	Blue Health Care	09/10/2001
Subtotal: Business Name - Tax Tech, Inc. (1)			
Records Shown: 3 Total Records: 3			

Use the Insurance Type drop-down list at the top of the summary to easily filter the policies by stage.

Group Policy Summary			
Insurance Type	All	Policy Stage	All
Summary	Detail (D)	Plan Summary	Letters/Documents
Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	02/03/2001
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	12/10/2001
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	01/05/2001
<input type="checkbox"/> Retirement	ABC Manufacturing	Nations Life Insurance	02/05/2001
Subtotal: Business Name - ABC Manufacturing (5)			
<b>Business Name - Ace Building</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> STD	Ace Building	California Life & Health	10/06/2001
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<input type="checkbox"/> A D & D	Ace Building	Colony Life	10/06/2001
Subtotal: Business Name - Ace Building (7)			
<b>Business Name - Plato Tea Importers</b>			
<input type="checkbox"/> Group LTC	Plato Tea Importers	Blue Sky Mutual	09/10/2001
Records Shown: 19 Total Records: 19			

### Sorting Group Policies

Group Policies can be sorted by Annual Premium, Business Name, Carrier Name, Paid To date, Policy #, Policy Date, Policy Status, Policy Type, or Product Name.

All of the policies belonging to ABC Manufacturing are listed first, followed by the policies belonging to ACE Building then followed by Plato Tea Import's policies. This is because the policies are currently sorted by business name.

Group Policy Summary			
Insurance Type	All	Policy Stage	All
Summary	Detail (D)	Plan Summary	Letters/Documents
Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	02/03/2001
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	12/10/2001
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	01/05/2001
<input type="checkbox"/> Retirement	ABC Manufacturing	Nations Life Insurance	02/05/2001
Subtotal: Business Name - ABC Manufacturing (5)			
<b>Business Name - Ace Building</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> STD	Ace Building	California Life & Health	10/06/2001
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<input type="checkbox"/> A D & D	Ace Building	Colony Life	10/06/2001
Subtotal: Business Name - Ace Building (7)			
<b>Business Name - Plato Tea Importers</b>			
<input type="checkbox"/> Group LTC	Plato Tea Importers	Blue Sky Mutual	09/10/2001
Records Shown: 19 Total Records: 19			



Hover the mouse cursor over the **Customize Spreadsheet Layout** button to see a list of sorting options.

**Group Policy Summary**

Insurance Type: All Policy Stage: All

Summary | Detail (D) | Plan Summary | Letters/Documents

Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	02/03/2001
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	12/10/2001
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	01/05/2001
<input type="checkbox"/> Retirement	ABC Manufacturing	Nations Life Insurance	02/05/2001
<b>Subtotal: Business Name - ABC Manufacturing (5)</b>			
<b>Business Name - Ace Building</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> STD	Ace Building	California Life & Health	10/06/2001
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<input type="checkbox"/> A D & D	Ace Building	Colony Life	10/06/2001
<b>Subtotal: Business Name - Ace Building (7)</b>			
<b>Business Name - Plato Tea Importers</b>			
<input type="checkbox"/> Group LTC	Plato Tea Importers	Blue Sky Mutual	09/10/2001

Records Shown: 19 Total Records: 19

To change the sort, select the appropriate sorting option.

**Change Sorting:**

- Annual Premium
- Business Name
- Carrier Name
- Paid To
- Policy #
- Policy Date - Month Grouping
- Policy Date - No Grouping
- Policy Date - Relative Grouping
- Policy Status
- Policy Type
- Product Name
- No sort

If the Carrier sort option is selected, the policies will be grouped based upon the carrier, regardless of business name.

**Group Policy Summary**

Insurance Type: All Policy Stage: All

Summary | Detail (D) | Plan Summary | Letters/Documents

Type	Business Name	Carrier Name	As Of Date
<b>Carrier Name - ABC Life</b>			
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<b>Subtotal: Carrier Name - ABC Life (1)</b>			
<b>Carrier Name - Blue Health Care</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	12/31/2001
<input type="checkbox"/> Group Medical	Tax Tech, Inc.	Blue Health Care	09/10/2001
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	12/10/2001
<input type="checkbox"/> Group Vision	Tax Tech, Inc.	Blue Health Care	09/24/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<b>Subtotal: Carrier Name - Blue Health Care (5)</b>			
<b>Carrier Name - Blue Medical</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	02/03/2001
<input type="checkbox"/> Group Dental	Tax Tech, Inc.	Blue Medical	09/24/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	01/05/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> Section 125	Plato Tea Importers	Blue Medical	05/01/2002
<b>Records Shown: 19 Total Records: 19</b>			


To see the percentage of policies in each policy type, click on the Display Pie Chart button.

**Group Policy Summary**

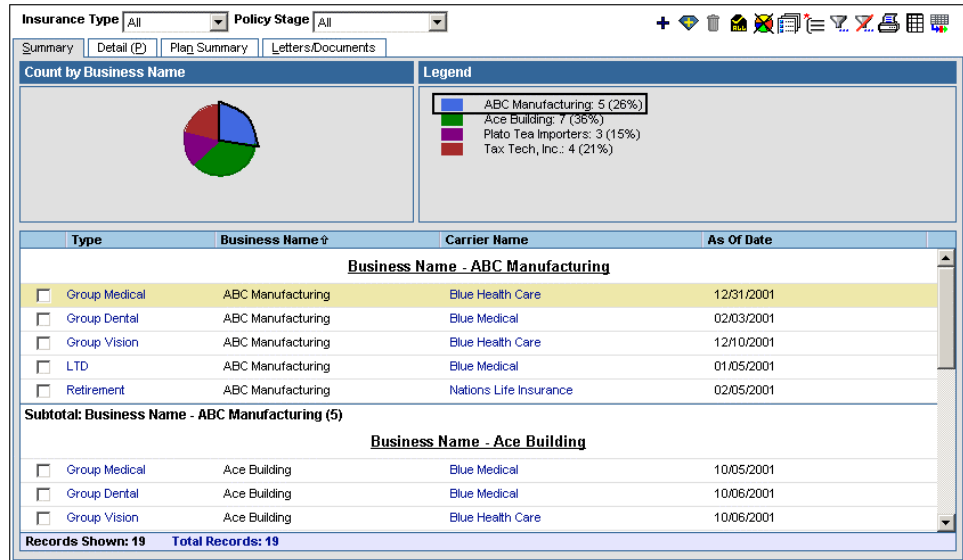
Insurance Type: All Policy Stage: All

Summary | Detail (D) | Plan Summary | Letters/Documents

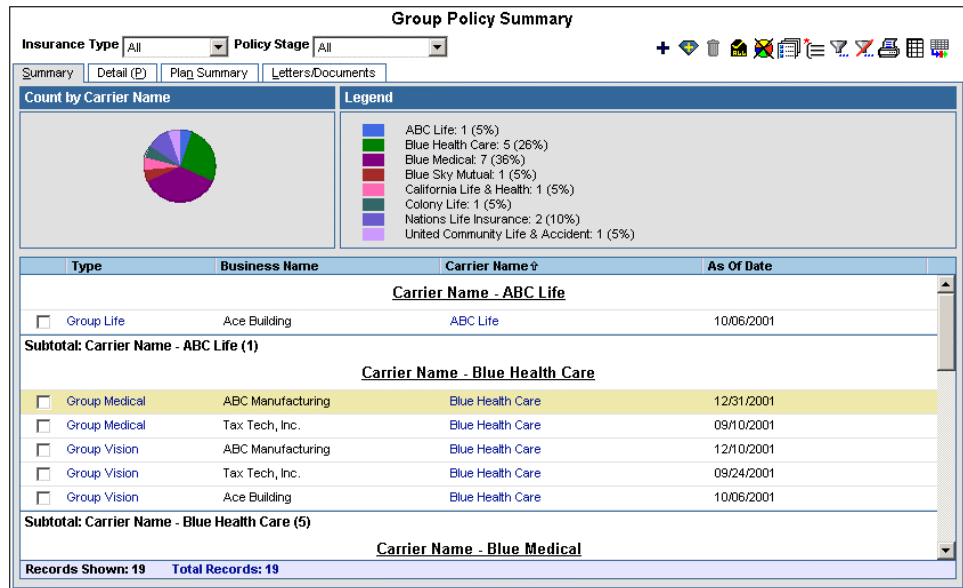
Type	Business Name	Carrier Name	As Of Date
<b>Business Name - ABC Manufacturing</b>			
<input type="checkbox"/> Group Medical	ABC Manufacturing	Blue Health Care	
<input type="checkbox"/> Group Dental	ABC Manufacturing	Blue Medical	
<input type="checkbox"/> Group Vision	ABC Manufacturing	Blue Health Care	
<input type="checkbox"/> LTD	ABC Manufacturing	Blue Medical	
<input type="checkbox"/> Retirement	ABC Manufacturing	Nations Life Insurance	
<b>Subtotal: Business Name - ABC Manufacturing (5)</b>			
<b>Business Name - Ace Building</b>			
<input type="checkbox"/> Group Medical	Ace Building	Blue Medical	10/05/2001
<input type="checkbox"/> Group Dental	Ace Building	Blue Medical	10/06/2001
<input type="checkbox"/> Group Vision	Ace Building	Blue Health Care	10/06/2001
<input type="checkbox"/> LTD	Ace Building	Blue Medical	
<input type="checkbox"/> STD	Ace Building	California Life & Health	10/06/2001
<input type="checkbox"/> Group Life	Ace Building	ABC Life	10/06/2001
<input type="checkbox"/> A D & D	Ace Building	Colony Life	10/06/2001
<b>Subtotal: Business Name - Ace Building (7)</b>			
<b>Business Name - Plato Tea Importers</b>			
<input type="checkbox"/> Group LTC	Plato Tea Importers	Blue Sky Mutual	09/10/2001
<b>Records Shown: 19 Total Records: 19</b>			



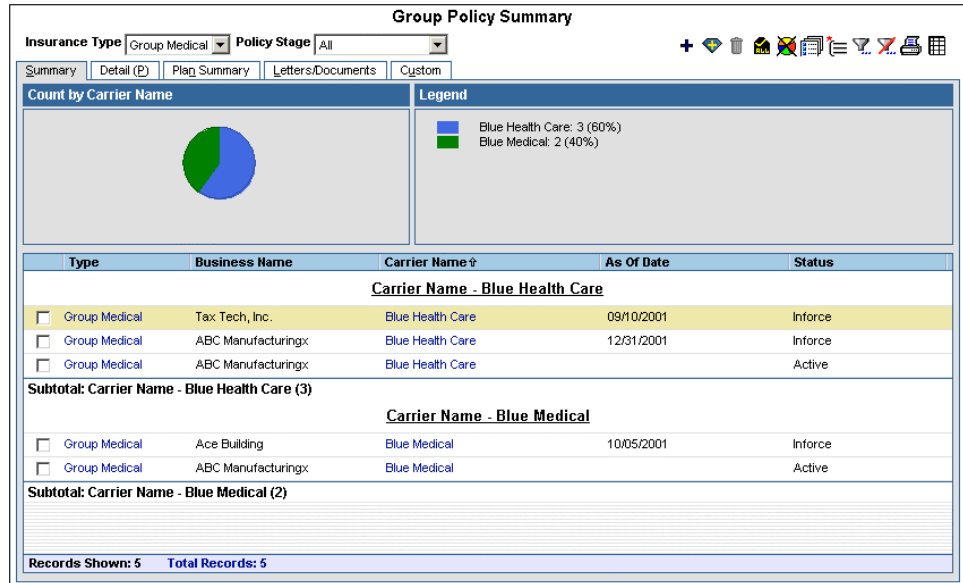
In this example, 26% of the policies are medical.



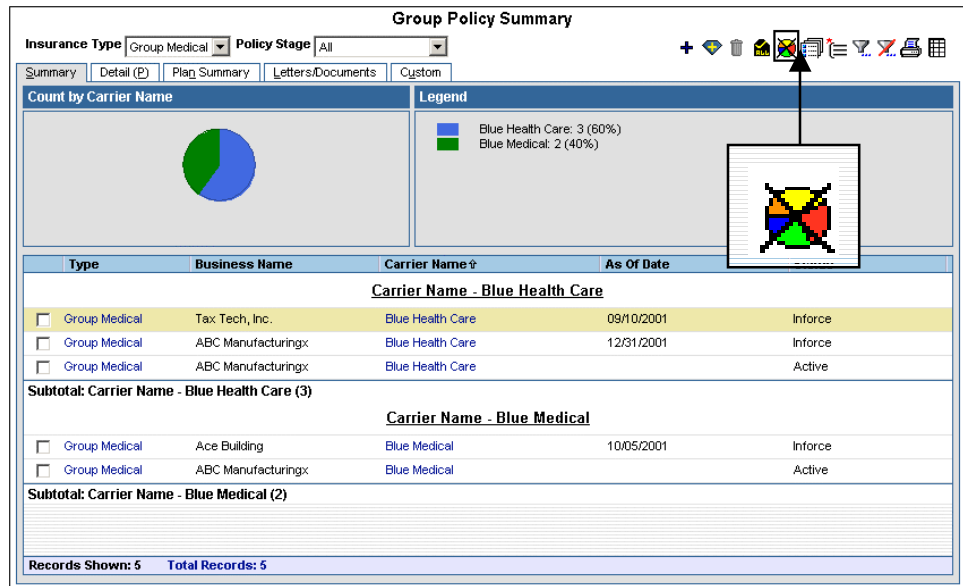
The Pie Chart is dependent upon the sort. If the sort is changed back to Business Name then the Pie Chart will describe the percentage of policies held by each business. In this example, Blue Health Care holds 26% of the policies.



The Pie Chart will only count the policies that are listed in the Group Policy Summary. Therefore, if only the medical policies are displayed then only the medical policies are counted in the pie chart.



To remove the pie chart, click on the Remove Pie Chart button.



## Detail Tab

Basic information such as which business the policy belongs to, the carrier and product, policy number, status, premium information, the length of time an employee needs to work for the business before qualifying for coverage as well as the number of hours per week an employee needs to work to be qualified for coverage, and employee participation is located on the Detail tab.

To see details on a particular policy, select the policy and move to the Detail tab.

**Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care**

Summary | **Detail (P)** | Plan Summary | Letters/Documents | Custom

**Group Plan Basic Information**

Business Name	ABC Manufacturing	Annldz Prem	7,800.00
Carrier	Blue Health Care	Priority	
Plan Name	Primary Care Medical Plus	Initial Rate	75%
Policy #	BC9120281-001	Rate Guarantee	3 Years
Case Unique ID		# of Members	
Status	Inforce	Probation Period	30 Days From Hire
Status Date		Termination Date	
Effective Date	12/15/1999	Minimum Hours	30 Hours
As Of Date	12/31/2001	ER Contribution	100%
Renewal Date	12/15/2002	Participation%	100.00
Modal Premium	650.00	Salary Updates	Quarterly
Prem Mode	Monthly	Plan Design	HMO & PPO
Pay Method		Last Modification	01/05/2003
Primary Advisor	Anderson, Philip		

To change the Detail tab from Read-Only mode to Edit Mode click the Switch to Edit Mode button.

**Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care**

Summary | Detail (P) | Plan Summary | Letters/Documents | Custom

**Group Plan Basic Information**

Business Name	ABC Manufacturing	Annldz Prem	7,800.00
Carrier	Blue Health Care	Priority	
Plan Name	Primary Care Medical Plus	Initial Rate	75%
Policy #	BC9120281-001	Rate Guarantee	3 Years
Case Unique ID		# of Members	8
Status	Inforce	Probation Period	30 Days From Hire
Status Date		Termination Date	
Effective Date	12/15/1999	Minimum Hours	30 Hours
As Of Date	12/31/2001	ER Contribution	100%
Renewal Date	12/15/2002	Participation%	100.00
Modal Premium	650.00	Salary Updates	Quarterly
Prem Mode	Monthly	Plan Design	HMO & PPO
Pay Method		Last Modification	01/05/2003
Primary Advisor	Anderson, Philip		

The number of employee members covered by the policy can either be manually entered or it can automatically be populated by clicking the # of Members hyperlink. SmartOffice calculates this number by counting the number of employees listed on the each Members sub-tab.

Group Policy - Medical Premium - Tax Tech, Inc. - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Plan Summary Letters/Documents Custom

**Group Plan Basic Information**

Business Name	Tax Tech, Inc.	Annltzd Prem	21,480.00
Carrier	Blue Health Care	Priority	
Plan Name	Primary Care Medical Plus	Initial Rate	75%
Policy #	1920381-045	Rate Guarantee	3 Years
Case Unique ID		# of Members	
Status	Inforce	Probation Period	30 Days From Hire
Status Date		Termination Date	
Effective Date	08/22/1990	Minimum Hours	40 Per Week
As Of Date	09/10/2001	ER Contribution	100%
Renewal Date	08/22/2002	Participation%	
Modal Premium	1,790.00	Salary Updates	Quarterly
Prem Mode	Monthly	Plan Design	HMO & PPO
Pay Method		Last Modification	10/20/2002
Primary Advisor	Anderson, Philip		

To see previously sent letters regarding this policy or any documents related to this policy, go to the Letters and Documents tab.

Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Plan Summary Letters/Documents Custom

**Letter Log**

Letter Title	Open	Keyword	Created On	Created By
<input type="checkbox"/> Agent - Approval Letter		Agent - Approval Letter	06/11/2004 06:42AM	Daniel Odell

**Document Summary**

Description	Open	Keyword	Created On
<input type="checkbox"/> Aps			06/11/2004 06:46AM

To create additional fields specific to the type of group policy, go to the Custom tab. Any of these fields can be renamed or hidden by a user with the appropriate security rights.

**Group Policy - Medical Premium**

Summary | Detail (P) | Plan Summary | Letters/Documents | Custom

Alphanumeric Fields	Numeric Fields	Date Fields
AlphaNum1	Num1	Date1
AlphaNum2	Num2	Date2
AlphaNum3	Num3	Date3
AlphaNum4	Num4	Date4
AlphaNum5	Num5	Date5
AlphaNum6	Num6	Date6
AlphaNum7		Date7
AlphaNum8		Date8
AlphaNum9		Date9
AlphaNum10		Date10
AlphaNum11		Date11
AlphaNum12		
AlphaNum13		
AlphaNum14		
AlphaNum15		
AlphaNum16		
AlphaNum17		
AlphaNum18		
AlphaNum19		
AlphaNum20		

Integer Fields	Lookup Fields	Check Boxes
Int1	Lookup1	YesNo1 <input type="checkbox"/>
Int2	Lookup2	YesNo2 <input type="checkbox"/>
Int3	Lookup3	YesNo3 <input type="checkbox"/>
Int4	Lookup4	YesNo4 <input type="checkbox"/>
Int5	Lookup5	YesNo5 <input type="checkbox"/>
		YesNo6 <input type="checkbox"/>
		YesNo7 <input type="checkbox"/>
		YesNo8 <input type="checkbox"/>

For plan information is accessed from the Plan Summary tab. All the plans available for this Policy are listed here.

**Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care**

Summary | Detail (P) | Plan Summary | Letters/Documents | Custom

**Group Plan Summary**

Summary | Premium | Custom | Members

Plan Name
<input type="checkbox"/> HMO
<input type="checkbox"/> PPO

The top set of tabs and buttons belongs to the Policy.

**Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care**

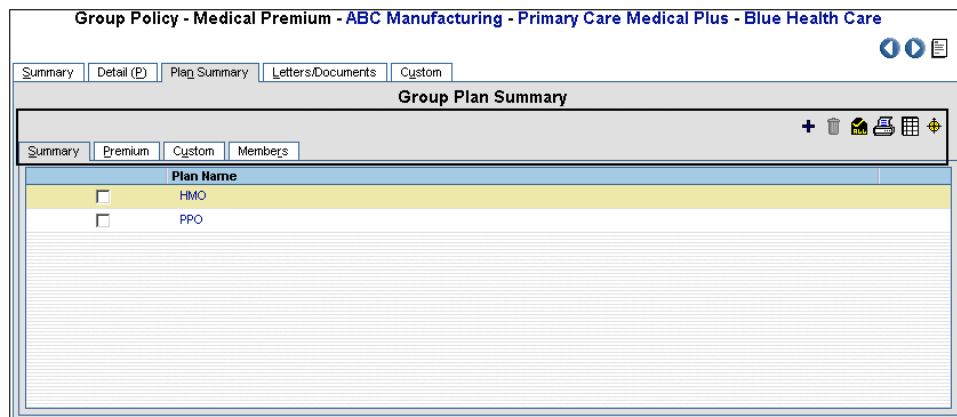
Summary | Detail (P) | Plan Summary | Letters/Documents | Custom

**Group Plan Summary**

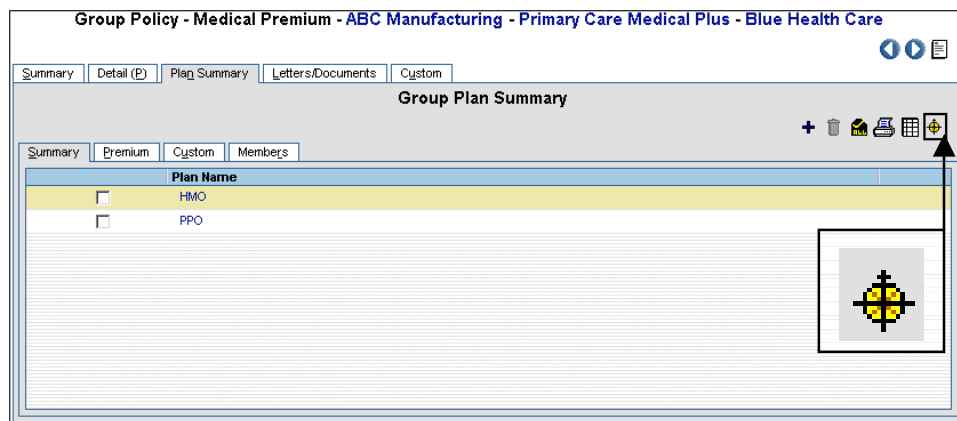
Summary | Premium | Custom | Members

Plan Name
<input type="checkbox"/> HMO
<input type="checkbox"/> PPO

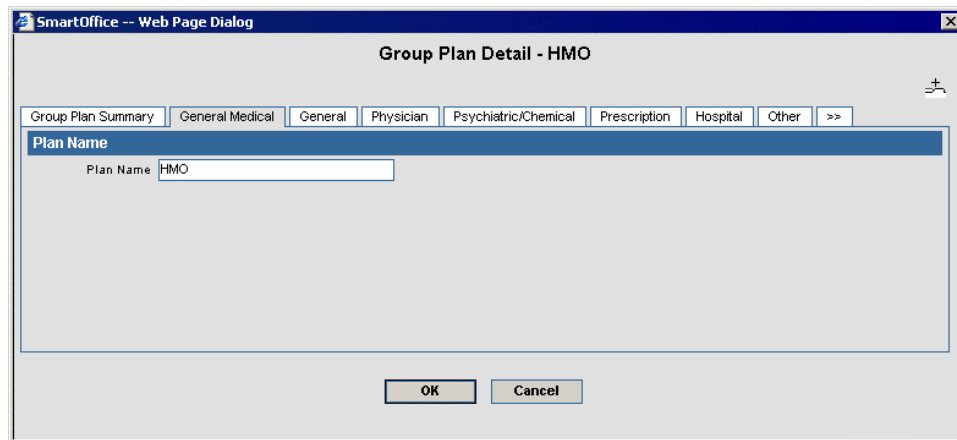
The bottom set belongs to the selected Plan.



To see the details of a plan's benefits, Select the appropriate plan and click the Show Benefits button.



This opens the Group Plan Detail popup box. From here, navigate through the tabs to see the plan related benefits and deductibles. All information in the Group Plan Detail popup box was entered on the Product level so it does not have to be entered for each policy.





For example, the Annual Copay is found on the General tab.

SmartOffice -- Web Page Dialog

System: General

Group Plan Summary | General Medical | **General** | Physician | Psychiatric/Chemical | Prescription | Hospital | Other | >>

Group Category Data Summary

Sub-Category Name	In Network	Out Network	Special/Other
Annual Deductible - Indiv	1000	2000	
Annual Deductible - Family	3000	5000	
Annual Copay - Indiv.	200	300	
Annual Copay - Family	500	800	
Lifetime Maximum			
Primary Care Physician Req.			Yes
Claim Forms Required			No
Pre-Existing Cond. Limits			None

Close

To see the premium information for a plan, select the appropriate plan and go to the Premium sub-tab. The amount paid by the employer and the employee for the selected plan is seen here.

Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care

Summary | Detail (P) | Plan Summary | Letters/Documents | Custom

Group Plan - HMO

Summary | Premium | Custom | Members

Premium

Monthly Premium	ER Cost	EE Cost	Participation
Employee Only	35.00		
Employee & Spouse	35.00	10.00	1
Employee & Child	35.00	15.00	2
Employee & 2 Children	35.00	15.00	
Employee & 3 Children	35.00	20.00	1
Employee & Children	35.00	25.00	1
Employee & Family	35.00	25.00	
Date Last Updated	01/08/2002	01/08/2002	01/08/2002
Total	175.00	85.00	
		Grand Total	260.00

A custom sub-tab is available for plans. This sub-tab behaves the same way as the Custom tab seen earlier. Fields defined here will be available for all other plans of the same type.

Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Plan Summary Letters/Documents Custom

Group Plan

Summary Premium Custom Members

Alphanumeric Fields	Numeric Fields	Date Fields
AlphaNum1	Num1	Date1
AlphaNum2	Num2	Date2
AlphaNum3	Num3	Date3
AlphaNum4	Num4	Date4
AlphaNum5	Num5	Date5
AlphaNum6	Num6	Date6
AlphaNum7		Date7
AlphaNum8		Date8
AlphaNum9		Date9
AlphaNum10		Date10
AlphaNum11		Date11
AlphaNum12		
AlphaNum13		
AlphaNum14		
AlphaNum15		
AlphaNum16		
AlphaNum17		
AlphaNum18		
AlphaNum19		
AlphaNum20		

Integer Fields
Int1
Int2
Int3
Int4
Int5

Lookup Fields
Lookup1
Lookup2
Lookup3
Lookup4
Lookup5

Check Boxes
YesNo1 <input type="checkbox"/>
YesNo2 <input type="checkbox"/>
YesNo3 <input type="checkbox"/>
YesNo4 <input type="checkbox"/>
YesNo5 <input type="checkbox"/>
YesNo6 <input type="checkbox"/>
YesNo7 <input type="checkbox"/>
YesNo8 <input type="checkbox"/>

To see a list of members covered by this plan, go to the Members sub-tab. A member cannot be added to a group policy plan unless they belong to the Business contact's Group Census.

Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Plan Summary Letters/Documents Custom

Group Plan - HMO

Summary Premium Custom Members

Group Members Summary				
Contact Name	Employer	Employee Class	Hire Date	Total Salary
<input type="checkbox"/> Ackerman, Kathleen M.	ABC Manufacturingx	Class 2 - Managers	02/14/2003	
<input type="checkbox"/> Antille, Eugene	ABC Manufacturing	Class 1 - Owners, Exec Mgmt.	05/14/1993	85,000
<input type="checkbox"/> Hamamoto, Tsuyako	ABC Manufacturing	Class 2 - Managers	08/04/1998	55,000
<input type="checkbox"/> Horley, Elan A.	ABC Manufacturing	Class 1 - Owners, Exec Mgmt.	05/14/1993	120,000
<input type="checkbox"/> Ernst, Rosemary	ABC Manufacturing	Class 2 - Managers	03/15/1995	85,000

Records Shown: 5 Total Records: 5

To attach another member to this plan, click the Add button.

Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care

Summary Detail (P) Plan Summary Letters/Documents Custom

Group Plan - HMO

Summary Premium Custom Members

Group Members Summary

Contact Name	Employer	Employee Class	Hire Date	Total Salary
<input type="checkbox"/> Ackerman, Kathleen M.	ABC Manufacturingx	Class 2 - Managers	02/14/2003	
<input type="checkbox"/> Antille, Eugene	ABC Manufacturing	Class 1 - Owners, Exec Mgmt.	05/14/1993	85,000
<input type="checkbox"/> Hamamoto, Tsuyako	ABC Manufacturing	Class 2 - Managers	08/04/1998	55,000
<input type="checkbox"/> Horley, Elan A.	ABC Manufacturing	Class 1 - Owners, Exec Mgmt.	05/14/1993	120,000
<input type="checkbox"/> Ernst, Rosemary	ABC Manufacturing	Class 2 - Managers	03/14/2003	85,000

Records Shown: 5 Total Records: 5

The Employee Census Summary dialog box opens. It only lists members of the Business' Group Census. An employee can only belong to one plan per policy. For example, if Joseph Ackerman belongs to the PPO plan, he cannot be attached to the HMO plan and therefore, will not be listed.

SmartOffice -- Web Page Dialog

Employee Census Summary

Contact Name	Employee Class	Hire Date	DOB	Marital
<input type="checkbox"/> Lee, Buddy				
<input type="checkbox"/> Evermore, Jackie	Class 2 - Managers		05/17/1965	Widowed
<input type="checkbox"/> Porter, Jessica	Class 3 - All Others	09/04/2000	08/11/1979	Separated

Records Shown: 3 Total Records: 3

OK Close

To see an employee's certificate for this policy, select him and click the Show Policy button. This would open the certificate in the individual policy module.

**Group Policy - Medical Premium - ABC Manufacturing - Primary Care Medical Plus - Blue Health Care**

Summary | Detail (P) | Plan Summary | Letters/Documents | Custom

**Group Plan - HMO**

Summary | Premium | Custom | Members

**Group Members Summary**

Contact Name	Employer	Employee Class	Hire Date	Total Salary
<input type="checkbox"/> Ackerman, Kathleen M.	ABC Manufacturingx	Class 2 - Managers	02/14/2003	
<input type="checkbox"/> Antille, Eugene	ABC Manufacturing	Class 1 - Owners, Exec Mgmt.	05/14/1993	85,000
<input type="checkbox"/> Hamamoto, Tsuyako	ABC Manufacturing	Class 2 - Managers	08/04/1998	55,000
<input type="checkbox"/> Horley, Elan A.	ABC Manufacturing	Class 1 - Owners, Exec Mgmt.	05/14/1993	
<input type="checkbox"/> Ernst, Rosemary	ABC Manufacturing	Class 2 - Managers	03/15/1995	

Records Shown: 5 Total Records: 5