

HRCONNECT USER MANUAL

Produced by the LISI Product Department



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OVERVIEW

WHAT IS HRCONNECT?

HRConnect is an online, integrated human resource (HR) management system designed to meet the needs of most employers and their employees. HRConnect includes a benefit plan administration system that is set up and maintained by the insurance agent. It summarizes all benefit plans and provides contact information for all carriers, enrollment forms, and other important information. Surveys of HR managers all draw the same conclusion—the most common employee inquiry is about health and benefit plans; therefore, an effective HR system must have robust benefit plan administration capabilities. HRConnect meets this need by having a system maintained by the local health and benefits expert.

HRConnect includes a variety of other capabilities as well, including employee record keeping, company calendar, HR reports, vacation and attendance tracking, and a company information section. A unique feature of HRConnect is that it's fully integrated with LISI's QuoteStar™, Powered by Healthconnect, quoting system, enabling transfer of detailed plan information from every major California medical carrier and employee-level benefit data. HRConnect is also seamlessly integrated with leading providers of payroll, COBRA, Section 125, Premium Only Plan (POP)/Flexible Spending Account (FSA), regulatory compliance, and other services that encompass the entire range of employee benefits and HR services. As a result, HRConnect acts as a single hub that can process all of an employer's HR needs.

HRConnect has two levels of access: one for the HR manager, and another for individual employees. The Home section enables users to quickly find the information or function they are seeking. Tabs across the top of the page allow for access to items like payroll, forms and benefits, while the company calendar, important links, and other quick-hit information are available at first glance.

Through HRConnect, users can view plan overviews and link to forms or information directly from the carrier, such as enrollment, claims or life changes. Employees can also drill down to specific benefits with just one click.

ABOUT THIS MANUAL:

As you will see, HRConnect is a powerful tool with numerous features that will assist companies to manage their HR. Since many of the day-to-day HR functions are managed through the system, a thorough understanding is essential, so that groups and their employees can get the most out of HRConnect.

This manual will go over each of the features in HRConnect—from deploying a group to setting up their plans and producing reports. We hope this manual proves to be a useful resource in understanding the value of this system.

HRConnect Contact Information:

- For day-to-day questions about using HRConnect, including deploying groups:
Your LISI Regional Sales Manager or Broker Sales Representative
(866) 570.5474
- For specific information about Premium Services:
Teresa Ledbetter
(877) 805.2828, extension 202
- For technical assistance with entering large groups or custom plans:
John Newman
(877) 805.2828, extension 251

HRConnect also conducts biweekly Web seminars for all users—groups and brokers. At these sessions, participants can learn more about HRConnect and obtain answers to questions. One can register for a Web seminar anytime by following the directions in the *Sign Up for Web Seminar* section of this manual.

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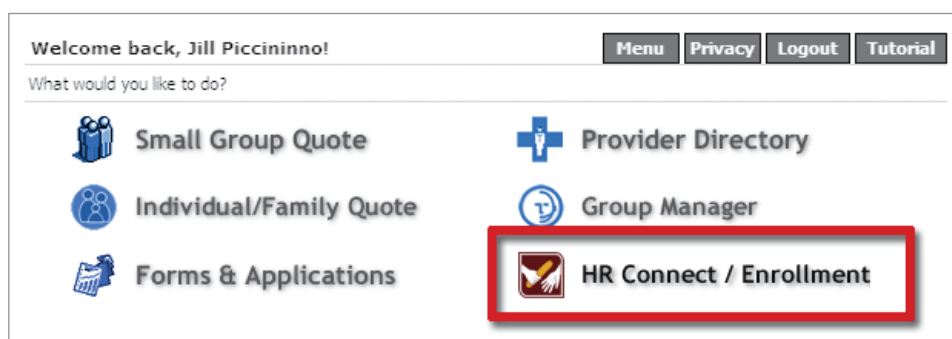
1. DEPLOYING A GROUP

Before a group can begin using HRConnect, they must first be deployed in the system by their broker. Group deployment is a basic group set-up which defines the group's basic information and health benefits, and grants access to the designated group administrator.

HOW TO DEPLOY A GROUP:

Step 1: Login. Go to www.lisibroker.com, enter your username and password beneath the left navigation of the Web site. Press the button, *Run a Quote! with HealthConnect*, or click the *Quoting* icon in the Toolbox area. On the Online Quotes page, choose the option, *QuoteStar™, Powered by HealthConnect*.

Step 2: Choose HRConnect. Click the *HRConnect/Enrollment* icon on the main menu.



Step 3: Select Group for Deployment. From the drop-down menu, choose the group you wish to deploy. Select the *Deploy Group* option under the *Select Task* section, then click *Next*.

 A screenshot of the "Select Group" form. At the top, there is a dropdown menu labeled "Select Group" with "HRConnect Demo Group" selected. Below this is the "Select Task" section with several radio button options: "Deploy Group" (which is selected), "Edit/Update Group", "Revoke Status", "Re-Grant Status", and "Import Census from HR". There is a link for "HRConnect Pricing" next to the "Deploy Group" option. At the bottom are "Back" and "Next" buttons.

Step 4: Complete the Group Information Page. Ensure that the pre-populated group information is correct. Enter any missing information to complete the form. Click *Next*.

 A screenshot of the "Group Information" form. It contains several input fields: "Group Name" (pre-filled with "HRConnect Demo Group"), "Address" (pre-filled with "123 Main St."), "City" (pre-filled with "Anytown"), "State" (a dropdown menu with "CA" selected), and "Zip" (pre-filled with "94402"). At the bottom are "Back" and "Next" buttons.

DEPLOYING A GROUP

Step 5: Complete the Employee Information Page. It is important to make sure the group census is correct and complete. If additions or deletions are necessary, go back to the group's quote and change the census. Remember, **full names must be included on the census**, so that plans can be assigned to employees. Additionally, assign one of the employees as the Group Administrator by entering their contact information at the bottom of the Web page. Click *Next*.

Employee Information							Edit/Add Employee(s)
	Name	DOB	Age	Gender	Status	Zip	Email (abbr.)
1.	Orlando Asimov	03/15/1966	42	Male	EE/Chld	94025	OA@hrconnect.co...
2.	Neil Bender	02/14/1967	41	Male	EE/Sp	94002	NB@hrconnect.co...
3.	Michele Cattani	01/13/1968	40	Female	EE	94404	MC@hrconnect.co...
4.	Larry Davidoff	12/12/1969	38	Male	Family	94403	LD@hrconnect.co...
5.	Kristie Edwards	11/11/1970	37	Female	EE/Chld	94402	KE@hrconnect.co...
6.	Jacques Fielder	10/10/1971	37	Male	EE/Sp	94401	JF@hrconnect.co...
11.	Edward Kringle	05/05/1976	32	Male	EE	94015	ED@hrconnect.co...
12.	David Lane	04/04/1977	31	Male	Family	94010	DL@hrconnect.co...
13.	Christina Micheletti	03/03/1978	30	Female	EE/Chld	94123	CM@hrconnect.co...
14.	Ben Nunez	02/02/1979	29	Male	EE/Sp	94109	BN@hrconnect.co...
15.	April O'Brien	01/01/1980	28	Female	EE	94107	AO@hrconnect.co...

Group Administrator Information

Email

Phone - - Ext.

Important note: If you prefer the password and username for the group to be e-mailed to you rather than the group's administrator, enter your e-mail address in the *Group Administrator Information* section.

Step 6: Complete the Agency Information Page. Make sure the brokerage information is correct. Enter any missing data or update any incorrect information. **Required step:** At the end of the form, specify if you want to be notified of employer changes in the system. Click *Next*.

Agency Information

Please complete required information, designated by an asterisk, then click Next.

Agency Name*

License #*

Address 1*

Address 2

City*, State*, Zip*

Phone* - -

Fax - -

Web URL

Agent First*

Agent Last*

Agent Phone* - -

Agent Cell

Agent Fax

Email Address*

Email Agent on ER Changes*

DEPLOYING A GROUP

Please note, HRConnect remembers changes made to the Agency Information page and applies them to all previous groups that have been set up in the system.

Step 7: Complete the Carrier Information Page. Select the group's medical carriers.

Select Medical Carrier(s)		
Carrier Name	Effective Date	End Date
<input type="checkbox"/> Aetna	11 / 01 / 2008	10 / 31 / 2009
<input checked="" type="checkbox"/> Anthem Blue Cross	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> Blue Shield	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> CaliforniaChoice	11 / 01 / 2008	10 / 31 / 2009
<hr/>		
<input type="checkbox"/> Sharp HMO	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> Sharp PPO	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> UnitedHealthcare	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> WHA	11 / 01 / 2008	10 / 31 / 2009

Make sure you also include all their dental carriers, if applicable.

Select Dental Carrier(s)		
Carrier Name	Effective Date	End Date
<input type="checkbox"/> Aetna DHMO	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> Aetna Freedom of Choice	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> Aetna PPO	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> Anthem Blue Cross Net DHMO	11 / 01 / 2008	10 / 31 / 2009
<input checked="" type="checkbox"/> Anthem Blue Cross PPO	11 / 01 / 2008	10 / 31 / 2009
<hr/>		
<input type="checkbox"/> PacifiCare Indemnity	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> PacifiCare PPO	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> PacifiCare PPO Plan	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> UnitedHealthcare PPO	11 / 01 / 2008	10 / 31 / 2009

Select the ancillary products your group has purchased, if applicable. Click *Next*.

Select Ancillary Offerings		
Type	Effective Date	End Date
<input checked="" type="checkbox"/> Life	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> LTD	11 / 01 / 2008	10 / 31 / 2009
<input type="checkbox"/> STD	11 / 01 / 2008	10 / 31 / 2009
<input checked="" type="checkbox"/> Vision	11 / 01 / 2008	10 / 31 / 2009

DEPLOYING A GROUP

Step 8: Complete the Plan Selection Pages. Select the **plans** the employer offers their group. Click *Next*.

Anthem Blue Cross - Medical		Effective Date	End Date	
<input type="checkbox"/>	Advantage PPO \$25 Co-pay	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Basic PPO	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Classic HMO	HMO	11/01/2008	10/31/2009
<input type="checkbox"/>	EE Choice HSA 2400 PPO	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	EE Choice PPO \$30 Co-Pay	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	EE Choice PPO \$35 Co-Pay	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	EE Choice Premier PPO \$20 Co-Pay	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	EE Choice Saver HMO	HMO	11/01/2008	10/31/2009
<input type="checkbox"/>	High Ded. EPO - \$2000 Ded	EPO	11/01/2008	10/31/2009
<input type="checkbox"/>	HMO 100%	HMO	11/01/2008	10/31/2009
<input checked="" type="checkbox"/>	Lumenos HSA 1500 Plan	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Lumenos HSA 3000 Plan	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	PPO Hospital BeneFits	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	PPO Hospital BeneFits Plus	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	PPO Hospital BeneFits Preferred	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Premier PPO \$10 Co-Pay	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Premier PPO \$20 Co-Pay	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Saver HMO	HMO	11/01/2008	10/31/2009
<input type="checkbox"/>	Saver PPO	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Solutions 2500 PPO	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Solutions 3500 PPO	PPO	11/01/2008	10/31/2009
<input type="checkbox"/>	Solutions 5000 PPO	PPO	11/01/2008	10/31/2009

On the next page, you can enter the policy numbers for the plans. Click *Next*.

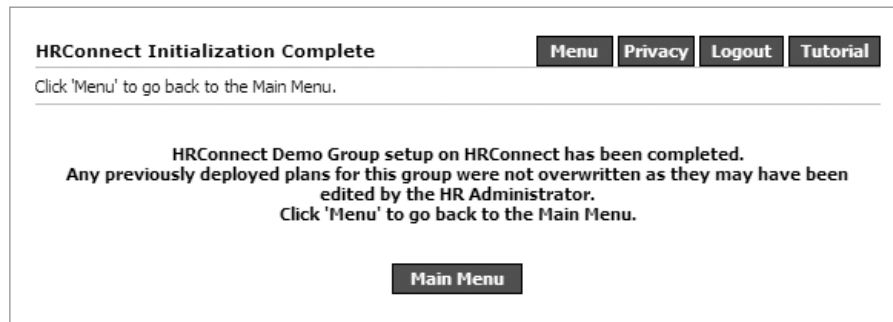
Step 9: Complete the Additional Options Page. Select the Premium Services you wish your group to see—the default is to see all the potential Premium Services. In most cases, you should set the system to transfer the employee rates, therefore keep the *Transfer Employee Rates* checkbox selected. Then, confirm the effective date of the group's medical plan(s) and their Risk Adjustment Factor (RAF). Click *Next*.

Additional Options		Menu	Privacy	Logout	Tutorial
Please complete required information, designated by an asterisk, then click Next.					
<input checked="" type="checkbox"/>	Initialize Online Enrollment				
<input checked="" type="checkbox"/>	Display HR Resources				
<input checked="" type="checkbox"/>	Display COBRA, FSA & POP Information				
<input checked="" type="checkbox"/>	Display Payroll Information				
<input checked="" type="checkbox"/>	Display Employee Assistance Program Information				
<input checked="" type="checkbox"/>	Display HR Services Pricing Information				
<input checked="" type="checkbox"/>	Transfer Employee Rates	Effective Date	<input type="text" value="11/01/2008"/>		
RAF Settings					
	Anthem Blue Cross	<input type="text" value="0.95"/>			
<input type="button" value="Back"/>		<input type="button" value="Next"/>			

For more information about Premium Services, please refer to the *Getting a Premium Services Quote* section of this manual.

Step 10: Complete the HRConnect Initialization Submission Page. Confirm that all the information is correct, then click *Next* to submit the form to HealthConnect.

Your group is now deployed!



An e-mail with the group's username and password will arrive soon at the e-mail address designated on the Employee Information Web page (Step 5).

Once the Group Administrator receives their login information, they can use the secure HRConnect system, explore Premium Services, add custom plans, and add information, links and documents on the Information section.

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2. GETTING A PREMIUM SERVICES QUOTE

In addition to all the features we will cover in this manual, HRConnect offers Premium Services to address additional HR needs, such as integrated payroll, COBRA, Section 125, and HR Consulting & Employee Handbook-Building. Premium Services are offered through partnerships with industry-leading vendors and they provide seamless integration with HRConnect. For example, when you make a personnel change to an employee's status, notification is immediately sent to the payroll, COBRA and/or Section 125 vendor, therefore removing unnecessary paperwork and delays.

To access Premium Services, you must purchase the requested service through one of HRConnect's vendors. This can be easily accomplished by calling **Teresa Ledbetter** at (877) 805.2828, extension 202. You can also visit HRConnect's Web site, www.reviewmybenefits.com, to request more information.

Prices for Premium Services can vary depending on a group's demographics. To find out the cost of these services, brokers can use any of the three options listed below. End users (your clients) will need to utilize Option 3. If they would like to see a more detailed proposal for Premium Services, they must contact you, their broker, to obtain a quote.

HOW TO OBTAIN A PREMIUM SERVICES QUOTE:

There are three ways to obtain a quote for HRConnect's Premium Services, and each method will produce a slightly different result. For your reference, there are examples of the three proposals in the Appendix of this manual.

The first two methods for obtaining a quote utilize LISI's QuoteStar™, Powered by HealthConnect, quoting system.

Option 1—Premium Services Detailed Proposal. This quoting method is utilized for both new groups and groups already in the quoting system. It will generate an 11-page proposal with detailed pricing and service descriptions.

1. Log onto the LISI Web site, www.lisibroker.com, click the *Run a Quote* button at the top of the home page, and select *QuoteStar™, Powered by HealthConnect* on the Online Quotes Web page.
2. On the quoting system home page, click the *Small Group Quote* button.
3. If you want to create a quote for a new group and they are not in QuoteStar™, Powered by HealthConnect, select *Quote a New Group*. If the group already exists in the system, select the group name from the drop-down menu. Then, click *Next*.
4. To create a quote for this group, follow the procedure for running a normal medical and/or dental quote until you reach the Report Options page.
5. On the Report Options page, mark the HRConnect checkbox under the HR Services sub-section (make sure no other checkboxes are selected). Click the *Create Proposal* button (highlighted on the next page).
6. Deliver the proposal:
 - a. E-mail the proposal to yourself and/or your client.
 - b. View and/or print the proposal by clicking the link, [View/Print Proposal](#).

GETTING A PREMIUM SERVICES QUOTE

The screenshot shows the 'HR Services' section of a web application. At the top, there's a header 'HR Services' and a sub-header 'HRConnect Quick Deployment'. Below this, a red message states: 'This group has been deployed - you only need to redeploy if you want to change plan information. Please create your proposal to view the HRConnect report.' The form is divided into several sections: 'Select Medical Plan(s)' with a list of Anthem Blue Cross plans; 'Select Dental Plan(s)' with a note that dental plans must be selected on the Dental Plans Selection Screen; 'Select Group Administrator' with a dropdown menu showing 'a, a'; and 'Enter Group Administrator Email' with a text field containing 'jvroomman@lisibroker.com'. There is a 'Deploy' button. Below these sections are 'Dental Plan Information', 'Life and Vision Plan Information' (with checkboxes for 'Group Life Proposal' and 'Group Vision Proposal'), and 'Printing Options' (with checkboxes for 'Use Letterhead' and 'Include Page Numbers'). At the bottom, there are four buttons: 'Back', 'Preview', 'Convert to XLS', and 'Create Proposal', with the 'Create Proposal' button highlighted by a red rectangle.

Option 2—Premium Services Proposal Summary. This quoting method is used solely for groups that exist in QuoteStar™, Powered by HealthConnect. It will produce a two-page proposal with detailed pricing and simplified services descriptions.

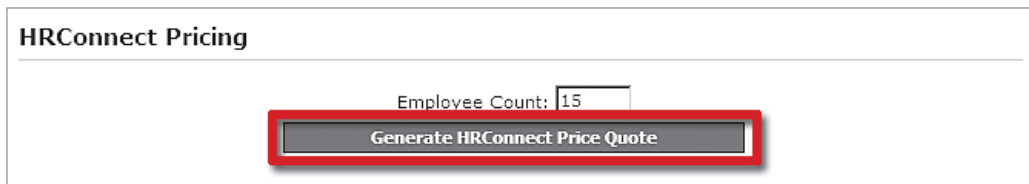
1. Log onto the LISI Web site, www.lisibroker.com, click the *Run a Quote* button at the top of the home page, and select *QuoteStar™, Powered by HealthConnect* on the Online Quotes Web page.
2. On the quoting system home page, click the *HRConnect/Enrollment* button.
3. Select the group you are quoting from the drop-down menu.
4. Click the *HRConnect Pricing* link.

The screenshot shows a user interface for 'Welcome, Jill Piccininno'. At the top, there are links for 'Menu', 'Privacy', 'Logout', and 'Tutorial'. Below this, a message says: 'To initiate HRConnect, select the desired group then click Next.' The form has two main sections: 'Select Group' with a dropdown menu showing 'Jason's Test Group', and 'Select Task' with a list of radio buttons: 'Deploy Group', 'Edit/Update Group', 'Revoke Status', 'Re-Grant Status', and 'Import Census from HR'. The 'Edit/Update Group' option is selected, and a red rectangle highlights the 'HRConnect Pricing' link next to it. At the bottom, there are 'Back' and 'Next' buttons.

GETTING A PREMIUM SERVICES QUOTE

Option 3—Premium Services Pricing Summary. This quoting method is produced for groups already deployed in the HRConnect system that would like pricing for Premium Services. This option will produce a one-page detailed pricing sheet with no description of the services provided.

1. Go to the HRConnect Web site, www.reviewmybenefits.com, and login using your username and password.
2. Click the Pricing Tab on the main menu.
3. On the Pricing section, enter in the textbox the number of employees to quote for this group.
4. Click the *Generate HRConnect Price Quote* button.



HRConnect Pricing

Employee Count:

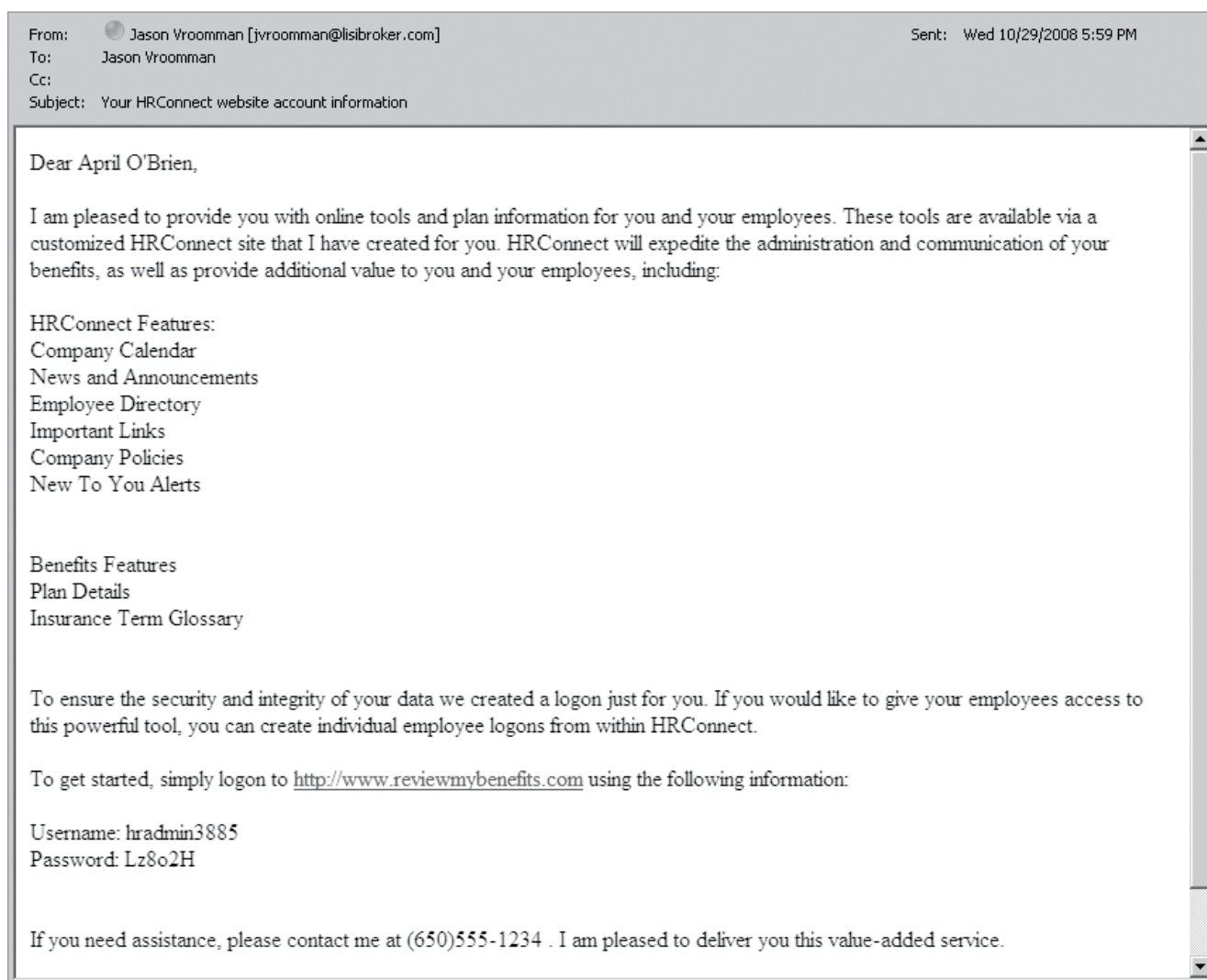
Generate HRConnect Price Quote

- a. When printing, you can set the orientation of the document in Landscape mode so all the pertinent data shown on the Web page will fit better on the printed page.

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3. GETTING STARTED

Once the group is successfully deployed, you (or the Group Administrator) will receive an e-mail containing a link to access the HRConnect Web site, www.reviewmybenefits.com, along with the username and password.



The password supplied in the welcome e-mail is a temporary password that will allow you to log onto the HRConnect Web site.

GETTING STARTED

The HRConnect Web site portal:



The HRConnect Log In page features a blue header with the HRConnect logo on the left and the text "Log In" in a large, light blue font on the right. Below the logo is a photograph of a woman in a green lab coat holding a laptop. To the right of the photo, the text reads "Welcome Back! Please enter your user name and password." The login form includes two input fields: "User Name" and "Password". Below the "Password" field is a link for "Forgot your Password?". A checkbox labeled "Do not remember my user name." is positioned below the password field. A "Login" link is located at the bottom right of the form. At the bottom center, there is a logo for "HealthCONNECT driven by". The footer contains the copyright notice: "Copyright © 2008 HealthConnect Systems. All Rights Reserved. (12)".

When you enter the HRConnect Web site for the first time, you will be required to change your password. The new password can be any combination of letters and numbers. Please note: Passwords are case-specific, so 'PASSWORD' is not the same as 'password.'



The Change Password page has a title "Change Password" at the top. Below the title, a message states: "This is either your first time logging in or your account password has been reset by an administrator. In order to secure your account we ask that you change your password." The form contains two input fields: "Password" and "Confirm Password", both masked with dots. A "Change Password" link is located to the right of the "Confirm Password" field. The footer includes the copyright notice: "Copyright © 2008 HealthConnect Systems. All Rights Reserved. (13)" and the "HealthCONNECT driven by" logo.

Once you modify your password, you will be directed to the Home section of the HRConnect Web site.

4. HOME TAB

After logging onto the HRConnect Web Site, www.reviewmybenefits.com, you will land on the Home section, the system's starting page. This page will be the most utilized by you and your employees once you set up the system for your group.

The Home section consists of five sections (item #1 below):

1. Company Calendar
2. New To You
3. Important Links
4. Announcements
5. Tools

The screenshot shows the HRConnect Demo Group Home page. At the top, there is a header with the group name and contact information. Below this is a navigation bar with tabs: Home, Employees, Benefits, Enrollment, Information, Reports, Help, Payroll, COBRA, FSA/POP, EAP, HR Resources, and Pricing. A 'Log Out' link is also present. The main content area is divided into several sections: 'Important Links', 'Announcements', 'Tools', 'Company Calendar', and 'New To You'. Each section has a table of items with columns for 'Active', 'Edit', 'Delete', and 'Add Item'. Red callouts are placed over the image: '3' points to the 'HRConnect tutorial video' and 'Sign up for a Web seminar' buttons; '2' points to the navigation tabs; and '1' points to the 'Important Links', 'Announcements', and 'Tools' sections.

HRConnect Demo Group
 123 Main St.
 Anytown, CA 94402 [Edit](#)
 Tel: 650-555-1234
jyromman@lisibroker.com [Edit](#)

Brought To You By
JPIS [View](#)

[HRConnect tutorial video](#) [Sign up for a Web seminar](#)

[Home](#) [Employees](#) [Benefits](#) [Enrollment](#) [Information](#) [Reports](#) [Help](#) [Payroll](#) [COBRA](#) [FSA/POP](#) [EAP](#) [HR Resources](#) [Pricing](#)

[Log Out](#)

Welcome to our company intranet. From this site you can access information on our benefit plans, read and download important documents, and view company related information.

Please review this site carefully. I'd be happy to hear suggestions as to any additional information you'd like to see included.

Let me know if you have any questions.

Thank You,

Benefits Administrator

[Edit](#)

Important Links: Active [+](#) [-](#) [Edit](#) [Delete](#) [Add Item](#)

Open Enrollment Summary for 2009	Active	Delete	Edit	11/3/2008
----------------------------------	--------	------------------------	----------------------	-----------

Announcements: Active [+](#) [-](#) [Edit](#) [Delete](#) [Add Item](#)

11/10/08 12:00 PM	Open Enrollment Meeting for 2009 (Lunch Served)	Active	Delete	Edit	11/3/2008
-------------------	---	--------	------------------------	----------------------	-----------

Tools: Active [+](#) [-](#) [Edit](#) [Delete](#) [Add Item](#)

2009 Open Enrollment Benefits Calculator	Active	Delete	Edit	11/3/2008
--	--------	------------------------	----------------------	-----------

Company Calendar: Active [+](#) [-](#) [Edit](#) [Delete](#) [Add Item](#)

Upcoming Events:

12/06/08 7:00 PM	Company Holiday Party	Active	Delete	Edit	11/3/2008
12/25/08 12:00 PM	Christmas Holiday - Day Off	Active	Delete	Edit	11/3/2008

New To You
 No New Items

[Read-Only Preview](#)

Each section can be populated with important information to distribute to your group's employees. Items or events can be added to any section, except *New To You*. Geared specifically to the employee, the *New To You* section spotlights the information from Sections 1 through 4 added by you as the HR Administrator. The next time an employee logs onto the Web site, he/she will see the information that is relevant under this section.

You can also navigate to other sections of the HRConnect Web site by using the tabs at the top of the screen (item #2 above). Furthermore, you can sign up to view a training video or attend a Web seminar to familiarize yourself with this Web site and its services by clicking one of the buttons above the tabs (item #3 above). We will provide more information about these services later in this section.

Edit Mode & Read-Only Preview

HRConnect offers flexibility to set up screens to suit your needs. Only the designated HR Administrator has access to change the basic setup of the group's HRConnect Web site. Once you log in as an HR Administrator, you enter the Edit Mode. You can easily modify how the sections appear on the Home section by changing their order. Clicking the single red arrow button (item #1) moves an item up or down by one position, while clicking the double red arrow buttons (item #2) moves an item to the top or bottom of the list.

HRConnect Demo Group
123 Main St.
Anytown, CA 94402 [Edit](#)
Tel: 650-555-1234
jvroooman@lisibroker.com

Brought To You By **JPIS** [View](#)

[HRConnect tutorial video](#) [Sign up for a Web seminar](#)

[Home](#) [Employees](#) [Benefits](#) [Enrollment](#) [Information](#) [Reports](#) [Help](#) [Payroll](#) [COBRA](#) [FSA/POP](#) [EAP](#) [HR Resources](#) [Pricing](#)

[Log Out](#)

Welcome to our company intranet. From this site you can access information on our benefit plans, read and download important documents, and view company related information.

Please review this site carefully. I'd be happy to hear suggestions as to any additional information you'd like to see included.

Let me know if you have any questions.

Thank You,

Benefits Administrator

Company Calendar: Active [Edit](#) [Delete](#) [Add Item](#)

Upcoming Events:

12/06/08 7:00 PM	Company Holiday Party	Active	Edit	Delete	Add Item
12/25/08 12:00 PM	Christmas Holiday - Day Off	Active	Edit	Delete	Add Item

Important Links: Active [Edit](#) [Delete](#) [Add Item](#)

[Open Enrollment Summary for 2009](#) Active [Delete](#) [Edit](#) 11/3/2008

Announcements: Active [Edit](#) [Delete](#) [Add Item](#)

11/10/08 12:00 PM Open Enrollment Meeting for 2009 (Lunch Served) Active [Delete](#) [Edit](#) 11/3/2008

Tools: Active [Edit](#) [Delete](#) [Add Item](#)

2009 Open Enrollment Benefit Calculator Active [Delete](#) [Edit](#) 11/3/2008

[Read-Only Preview](#)

You can also view an example of what your employees will see when they log onto the HRConnect Web site by clicking the [Read-Only Preview](#) link, located at the bottom, right corner of the screen. The Web page will refresh and display the Home section without the edit features. You can toggle back to the edit mode at any time by clicking the [Edit Mode](#) link.

HRConnect Demo Group
123 Main St.
Anytown, CA 94402 [Edit](#)
Tel: 650-555-1234
jvroooman@lisibroker.com

Brought To You By **JPIS** [View](#)

[HRConnect tutorial video](#) [Sign up for a Web seminar](#)

[Home](#) [Employees](#) [Benefits](#) [Enrollment](#) [Information](#) [Reports](#) [Help](#) [Payroll](#) [COBRA](#) [FSA/POP](#) [EAP](#) [HR Resources](#) [Pricing](#)

[Log Out](#)

Welcome to our company intranet. From this site you can access information on our benefit plans, read and download important documents, and view company related information.

Please review this site carefully. I'd be happy to hear suggestions as to any additional information you'd like to see included.

Let me know if you have any questions.

Thank You,

Benefits Administrator

Company Calendar:

Upcoming Events:

12/06/08 7:00 PM	Company Holiday Party
12/25/08 12:00 PM	Christmas Holiday - Day Off

Important Links:

[Open Enrollment Summary for 2009](#)

Tools:

[2009 Open Enrollment Benefit Calculator](#)

[Edit Mode](#)

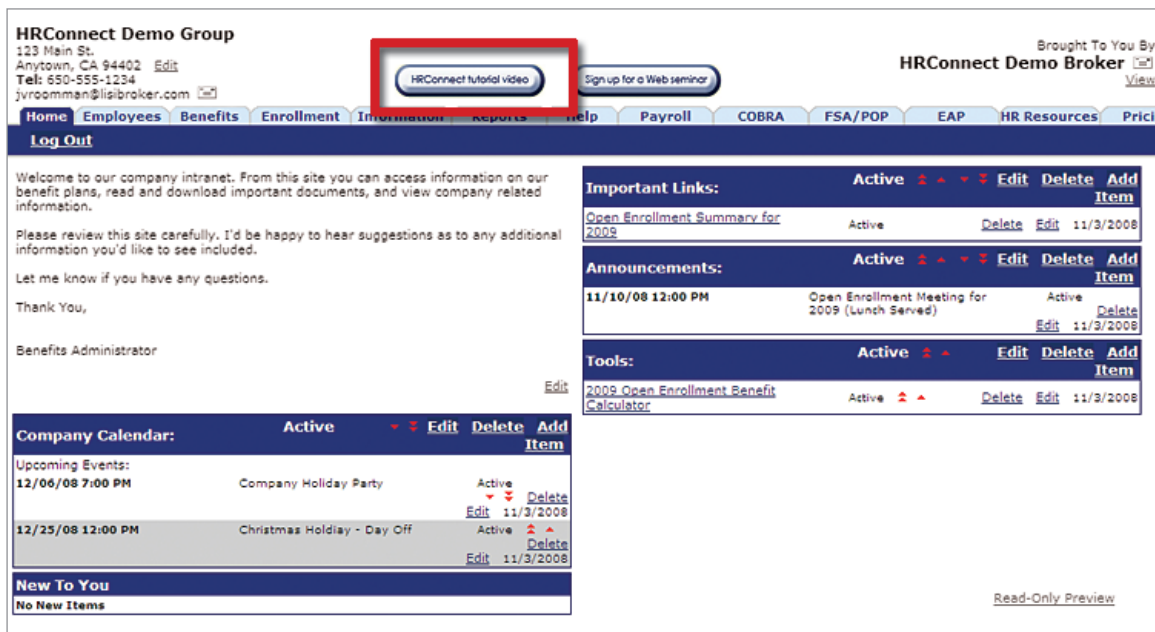
Viewing the Training Video

HealthConnect provides a 17-minute training video about HRConnect, explaining its concept and the services available on both the basic platform and Premium Services. Video topics include:

- Introduction
- System Summary
- Base System
 - Home Section
 - Employees Section
 - Benefits Section
 - Enrollment Section
 - Information Section
 - Reports Section and more
- Premium Services
 - Payroll
 - COBRA
 - FSA/POP
 - EAP
 - HR Resources
- Pricing
- Employee Access
- Contact Information

TWO WAYS TO ACCESS THE VIDEO:

Option 1. Log onto the HRConnect Web site, www.reviewmybenefits.com, and click the *HRConnect Tutorial Video* button.



Option 2. Enter the following link in your internet browser: <http://www.healthconnectsystems.com/hcs/HRCVideo.aspx>.

You can view the training video in normal sequence or skip and play the sections that interest you by clicking a title on the video navigation.

Signing up for a Web Seminar

HealthConnect offers online HRConnect training seminars to help users learn the system and provide details about its Premium Services. Free Web seminars are currently held biweekly, Wednesday and Friday, at 10:00 AM to 11:30 AM. (Frequency and times are subject to change.)

HOW TO SIGN UP FOR A WEB SEMINAR:

1. Login to the HRConnect Web site, www.reviewmybenefits.com, using your username and password.
2. Click the *Sign Up for a Web Seminar* button at the top, middle section of the Web page.

The screenshot shows the HRConnect Demo Group website. At the top, there is a navigation bar with links: Home, Employees, Benefits, Enrollment, Information, Reports, Help, Payroll, COBRA, FSA/POP, EAP, HR Resources, and Pricing. A 'Log Out' link is also present. The main content area includes a welcome message, a 'Company Calendar' section with 'Active' status and links to 'Edit', 'Delete', and 'Add Item', and an 'Important Links' section. A 'Tools' section at the bottom shows 'Active' status and links to 'Edit', 'Delete', and 'Add Item'. A 'New To You' section is also visible. The 'Sign up for a Web seminar' button is highlighted with a red box.

3. On the next page, a list of available Web seminar dates and times will be displayed. If you are interested in participating in a training seminar, select a date and time that works best for you, and click the [Join](#) link next to your choice.

HRConnect Training Seminars			
Seminar	Date	Time	
HRConnect Demo	Wednesday, 11/12/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Friday, 11/14/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Friday, 11/21/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Wednesday, 11/26/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Wednesday, 12/03/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Friday, 12/05/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Wednesday, 12/10/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Friday, 12/12/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Wednesday, 12/17/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Friday, 12/19/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Wednesday, 12/24/2008	10:00 AM - 11:30 AM PDT	Join
HRConnect Demo	Wednesday, 12/31/2008	10:00 AM - 11:30 AM PDT	Join

HOME TAB: SIGNING UP FOR A WEB SEMINAR

4. A new window will open and display the registration page for your chosen Web seminar. Complete the required registration information, then click the *Register Now* button to submit the form.

Register for Our Webinar >>>>

When:
Wednesday, November 12, 2008
10:00 PM - 11:30 PM PST

Use the form on the right to reserve your Webinar seat.

* Indicates a required field

* First Name:

* Last Name:

* Email Address:

* Address:

* City:

* State/Province:

* Zip/Postal Code:

* Phone:

* Industry:

* Job Title:

* Number of Employees:

* How did you hear about this training today?

Questions & Comments:

Register Now

5. You will receive a confirmation message, including information on how to access the Web seminar, at the e-mail address you provided during the registration process.

MINIMUM SYSTEM REQUIREMENTS:

In order to access the Web seminar, the computer you use must meet the following minimum specifications:

- PC-based attendees: Windows® 2000, XP Home, XP Pro, 2003 Server, Vista
- Macintosh®-based attendees: Mac OS® X 10.3.9 (Panther®) or newer

Adding Items

HRConnect allows you to incorporate information useful to your organization. In each section of the Home section, items such as calendar events, links, and documents can be added. As an example, let's add a document, the 2009 Holiday Schedule, to the *Important Links* section of the group's Home section.

HOW TO ADD AN ITEM IN THE HOME SECTION:

1. Click the Add Item link under the *Important Links* section.

HRConnect Demo Group
123 Main St.
Anytown, CA 94402 [Edit](#)
Tel: 650-555-1234
jvroomman@lisibroker.com [View](#)

[HRConnect tutorial video](#) [Sign up for a Web seminar](#)

[Home](#) [Employees](#) [Benefits](#) [Enrollment](#) [Information](#) [Reports](#) [Help](#) [Payroll](#) [COBRA](#) [FSA/POP](#) [EAP](#) [HR Resources](#) [Pricing](#)

[Log Out](#)

Welcome to our company intranet. From this site you can access information on our benefit plans, read and download important documents, and view company related information.

Please review this site carefully. I'd be happy to hear suggestions as to any additional information you'd like to see included.

Let me know if you have any questions.

Thank You,

Benefits Administrator [Edit](#)

Company Calendar: Active [Edit](#) [Delete](#) [Add Item](#)
Upcoming Events:
12/06/08 7:00 PM Company Holiday Party Active [Delete](#) [Edit](#) 11/3/2008

Important Links: Active [Edit](#) [Delete](#) [Add Item](#)
[Open Enrollment Summary for 2009](#) Active [Delete](#) [Edit](#) 11/3/2008

Announcements: Active [Edit](#) [Delete](#) [Add Item](#)
11/10/08 12:00 PM Open Enrollment Meeting for 2009 (Lunch Served) Active [Delete](#) [Edit](#) 11/3/2008

Tools: Active [Edit](#) [Delete](#) [Add Item](#)
[2009 Open Enrollment Benefit Calculator](#) Active [Delete](#) [Edit](#) 11/3/2008

2. In the *Item Type* drop-down menu, select the type of item you want to add; in this case, select *Document* (item #1 below).

Add Item

Item Type * Document [1](#)

Label *

My Documents [Upload and Manage Documents](#) [2a](#) [2](#)

Documents From Broker

Forms Warehouse

Description (can leave blank)

Effective Date (leave blank if always available)

Expiration Date (leave blank if always available)

[Add](#) [Cancel](#)

3. Under *My Documents*, select the file you want to add from the drop-down menu (item #2 above). If the file does not appear as an option in the menu, follow this four-step process to add and upload the file:
 - a. Click the Upload and Manage Documents link (item #2a above).
 - b. Create a record in the *Documents* screen by clicking the Add link.

Documents [Add](#)

<input type="checkbox"/>	Name	Description	FileName	Update Date	
<input type="checkbox"/>	2009 Benefit Calculator		2009 Benefit Calculator.xls	11/03/2008	Edit
<input type="checkbox"/>	2009 Open Enrollment Summary		Open Enrollment Summary.doc	11/03/2008	Edit

[Back](#)

HOME TAB: ADDING ITEMS

- c. In the *Document Upload* screen, you must enter a name for your document. A brief description may also be added if applicable. Click the *Browse* button to locate the Holiday Schedule document in your computer. Then, click the Upload Document link.

HRConnect Demo Group Document Upload
Input the required fields to upload a client document.

Document Name * 2009 Holiday Schedule

Document Description Days off for 2009

File * HP_Administrator\Desktop\2009 Holiday Schedule.doc [Browse...](#)

[Upload Document](#) [Cancel](#)

- d. Once the 2009 Holiday Schedule is uploaded, it will appear on the *Documents* list. Click the Back link to return to the *Add Item* screen.

<input type="checkbox"/>	Name	Description	FileName	Update Date	Edit
<input type="checkbox"/>	2009 Benefit Calculator		2009 Benefit Calculator.xls	11/03/2008	Edit
<input type="checkbox"/>	2009 Holiday Schedule	Days off for 2009	2009 Holiday Schedule.doc	11/13/2008	Edit
<input type="checkbox"/>	2009 Open Enrollment Summary		Open Enrollment Summary.doc	11/03/2008	Edit

[Back](#)

4. You must designate a label to the document, then select the appropriate file from the drop-down menu in *My Documents*. You can also add a description, as well as set a time period for displaying this item on the Home section. You may also leave the effective and expiration dates blank to keep the item visible at all times. Finally, click the Add link.

Add Item

Item Type * Document

Label * 2009 Holiday Schedule

My Documents [Upload and Manage Documents](#) 2009 Holiday Schedule

Documents From Broker

Forms Warehouse

Description (can leave blank)

Effective Date (leave blank if always available) 11/01/2008

Expiration Date (leave blank if always available) 12/31/2009

[Add](#) [Cancel](#)

5. The 2009 Holiday Schedule is now available under the *Important Links* section of your group's Home section.

Welcome to our company intranet. From this site you can access information on our benefit plans, read and download important documents, and view company related information.

Please review this site carefully. I'd be happy to hear suggestions as to any additional information you'd like to see included.

Let me know if you have any questions.

Thank You,

Benefits Administrator

[Edit](#)

Company Calendar: Active [Edit](#) [Delete](#) [Add Item](#)

Upcoming Events:

12/06/08 7:00 PM Company Holiday Party Active [Delete](#) [Edit](#) 11/3/2008

12/25/08 12:00 PM Christmas Holiday - Day Off Active [Delete](#) [Edit](#) 11/3/2008

New To You

Important Links: [2009 Holiday Schedule](#)

Important Links: Active [Edit](#) [Delete](#) [Add Item](#)

[Open Enrollment Summary for 2009](#) Active [Delete](#) [Edit](#) 11/3/2008

[2009 Holiday Schedule](#) Active [Delete](#) [Edit](#) 11/13/2008

Announcements: Active [Edit](#) [Delete](#) [Add Item](#)

11/10/08 12:00 PM Open Enrollment Meeting for 2009 (Lunch Served) Active [Delete](#) [Edit](#) 11/3/2008

Tools: Active [Edit](#) [Delete](#) [Add Item](#)

[2009 Open Enrollment Benefit Calculator](#) Active [Delete](#) [Edit](#) 11/3/2008

[Read-Only Preview](#)

Adding your Company Logo

One of HRConnect's customizable features is the ability to add your company's logo to the Web site. The logo will display on the upper left corner of every Web page, next to your company's contact information.



How to Upload a Logo:

1. Click the Edit link located right next to your company's contact information.



2. Click the Upload Logo link located on the right side of the Web page.

Employer Detail
 Review and update employer information.

Update

Upload Logo

Back

Company *

HRConnect Demo Group

Address

123 Main St.

Address

City

Anytown

State

CA

Zip *

94402

Phone

(650) 555-1234

Extension

Fax

() -

Email

jvroomman@lisibroker.com

Admin Email

jvroomman@lisibroker.com

HOME TAB: ADDING YOUR COMPANY LOGO

- On the *Upload Client Logo* screen, click the *Browse* button and find the graphics file of the logo saved on your computer's hard drive or network. Please note, the maximum size of the logo is 200 x 60 pixels and it must be in .jpeg or .jpg file format.

Upload Client Logo

To upload a logo, enter the filename here:

NOTE: The logo size should be 200x60 pixels (WxH), and in .JPEG or .JPG format.

[Save](#) [Cancel](#)

- Click the [Save](#) link to upload the file to the system.

This Page Left Intentionally Blank

5. EMPLOYEES TAB

Manage Employees

The primary purpose of HRConnect is to efficiently manage HR data. To facilitate this, employee information must be entered into the system under the Employees section.

In the *Manage Employees* section, you can upload a census list of the group's employees or register a new hire. You can also add employee details (such as their phone numbers and addresses), designate an employment status, assign plans, and delete a terminated employee from the group list.

Adding Details:

Gather and enter as much pertinent information as needed for every employee in your group.

1. To edit an employee's record, select an employee from the list and click the Details link next to their name.

Manage Employees Employee Access Company Directory Census			
Manage Employees			
This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.			
		New Hire Upload Employee Census	
Last ^	First	Employment Status	
Asimov	Orlando	Active	Details Assign Plans Delete Employee
Bender	Neil	Active	Details Assign Plans Delete Employee
Cattan	Michele	Active	Details Assign Plans Delete Employee
Davidoff	Larry	Active	Details Assign Plans Delete Employee
Edwards	Kristie	Active	Details Assign Plans Delete Employee
Micheletti	Christina	Active	Details Assign Plans Delete Employee
Nunez	Ben	Active	Details Assign Plans Delete Employee
O'Brien	April	Active	Details Assign Plans Delete Employee

EMPLOYEES TAB: MANAGE EMPLOYEES

2. Complete the employee record (item #1 below).

Employee Details for Larry Davidoff

Review and update employee level information. Some information is read only to the employee (such as salary).

1 **2** [Update](#) [Back](#)

Name and Demographics

First * Middle Last *
Birth Date * SSN Gender * ☒ Male ☐ Female
Status * ☒ Include in Quote? Class *
Email Employee Number
Hire Date Start Date

Home Address

Address1 Address2
City State Zip *
Phone

Work Address

Address1 Address2
City State Zip
Phone x Fax

Dependents [Add](#)

No dependents have been entered.

Emergency Contacts [Add](#)

No contacts have been entered.

3

3. Click the [Update](#) link to save the data (item #2 above).
4. To add dependents or emergency contacts for an employee, click the [Add](#) link under the Dependents and/or Emergency Contacts section(s) (item #3 above).
 - a. Enter the required information under the Dependents and/or Emergency Contacts screen(s). Click the [Update](#) link to save the data.

Dependent

Please insert your dependent information.

[Update](#) [Back](#)

Name and Demographics

First * Middle Last *
SSN DOB
☐ Full-time student Type * Gender * ☐ Male ☐ Female

Home Address

Address1 Address2
City State Zip

EMPLOYEES TAB: MANAGE EMPLOYEES

- b. The employee's dependent (or emergency contacts) information will display on the *Employee Details* screen.

[Update](#) [Back](#)

Name and Demographics

First *	<input type="text" value="Orlando"/>	Middle	<input type="text"/>	Last *	<input type="text" value="Asimov"/>
Birth Date *	<input type="text" value="3/15/1966"/>	SSN	<input type="text"/>	Gender *	<input checked="" type="radio"/> Male <input type="radio"/> Female
Status *	<input type="text" value="EE & Child"/>	<input checked="" type="checkbox"/> Include in Quote?	Class *	<input type="text" value="Default"/>	
Email	<input type="text" value="AO@HRC DG.com"/>			Employee Number	<input type="text" value="1"/>
Hire Date	<input type="text" value="1/1/1986"/>	Start Date	<input type="text" value="1/1/1986"/>		

Home Address

Address1	<input type="text" value="225 Pine Street"/>	Address2	<input type="text"/>
City	<input type="text" value="Menlo Park"/>	State	<input type="text" value="California"/>
Phone	<input type="text"/>	Zip *	<input type="text" value="94025"/>

Work Address

Address1	<input type="text" value="123 Main St"/>	Address2	<input type="text"/>
City	<input type="text" value="San Mateo"/>	State	<input type="text" value="California"/>
Phone	<input type="text" value="(650)555-9876"/>	x	<input type="text" value="100"/>
Fax	<input type="text"/>		

Dependents

[Add](#)

Name	Type	DOB	
Juanita Asimov	Spouse		View/Edit Delete

Emergency Contacts

[Add](#)

No contacts have been entered.

Designating an Employment Status:

Under the *Employment Status* column of the *Manage Employees* section, you can designate a status—Active, Terminated, Rehired, Inactive—for each employee in your company.

1. To assign an employment status to an employee, select an employee from the list and click the *Active* link next to their name.

[Manage Employees](#) [Employee Access](#) [Company Directory](#) [Census](#)

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Last	First	Employment Status	
Asimov	Orlando	Active	Details Assign Plans Delete Employee
Bender	Neil	Active	Details Assign Plans Delete Employee
Cattan	Michele	Active	Details Assign Plans Delete Employee
Davidoff	Larry	Active	Details Assign Plans Delete Employee
Edwards	Kristie	Active	Details Assign Plans Delete Employee
Micheletti	Christina	Active	Details Assign Plans Delete Employee
Nunez	Ben	Active	Details Assign Plans Delete Employee
O'Brien	April	Active	Details Assign Plans Delete Employee

EMPLOYEES TAB: MANAGE EMPLOYEES

2. In the *Employee Employment Status* screen, you can set the employee's status, along with their job type, pay type, job title, and wage. The Status Date text field is used to note when changes to the employee's record are entered into HRConnect.

Employee Employment Status for Orlando Asimov

Please review the employee status information listed below. To edit, enter the correct information and click 'Update Status'. To reset or go back without making changes, click 'Back'.

Employees can view the information on this page EXCEPT for the note column which is only available to administrators.

[Update Status](#) [Back](#)

Status * Status Date *
Job Type * Job Title
Pay Type * Wage *
Note
(the note field is not visible to Employees)

Status	Status Date	Job Type	Title	Wage	Note
Active	10-29-2008	Full Time		\$10000.00 / Salary	Default entry.

3. Click the *Update Status* link to save your changes to HRConnect (highlighted above).

Assigning Plans:

After you complete entering information for each employee, you must assign each employee to a plan under each line of coverage—Medical, Dental, Vision, and so on—as applicable.

1. To assign a plan to an employee, click the [Assign Plans](#) link next to their name.

[Manage Employees](#) [Employee Access](#) [Company Directory](#) [Census](#)

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Last	First	Employment Status	
Asimov	Orlando	Active	Details Assign Plans Delete Employee
Bender	Neil	Active	Details Assign Plans Delete Employee
Cattan	Michele	Active	Details Assign Plans Delete Employee
Davidoff	Larry	Active	Details Assign Plans Delete Employee
Edwards	Kristie	Active	Details Assign Plans Delete Employee
Micheletti	Christina	Active	Details Assign Plans Delete Employee
Nunez	Ben	Active	Details Assign Plans Delete Employee
O'Brien	April	Active	Details Assign Plans Delete Employee

2. For each line of coverage listed in the system, assign a plan to an employee by clicking the button next to the employee's plan choice.

EMPLOYEES TAB: MANAGE EMPLOYEES

- After making a plan choice for each line of coverage, click the [Update](#) link to save your selections.

Please select up to one plan per coverage type. You can also waive coverage if that option is available.

[Update](#) [Cancel](#)

Health			
Carrier Name	Plan Name	Effective Date	Clear
Anthem Blue Cross	Lumenos HSA 1500 Plan	11/1/2008	<input checked="" type="radio"/>
Assurant	PPO 90/70 \$500	11/1/2008	<input type="radio"/>

Dental			
Carrier Name	Plan Name	Effective Date	Clear
Anthem Blue Cross PPO	Dental Blue Platinum Plus 100-80th UCR	11/1/2008	<input type="radio"/>
	Waive coverage		<input type="radio"/>

Deleting an Employee:

If an employee leaves your group and you are certain that their information is no longer needed in HRConnect, you have the option to delete the terminated employee's records. **However, please note that the *Delete Employee* feature is not recommended for use.** Instead, it is advisable to set the terminated employee's status to *Inactive* to prevent data loss. (This topic will be covered later in this chapter.) Currently, there is no method available to recover this information once you confirm an employee deletion. Please consider your deletions carefully.

- To delete an employee record, select an employee from the list and click the [Delete Employee](#) link next to their name.

[Manage Employees](#) [Employee Access](#) [Company Directory](#) [Census](#)

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Last	First	Employment Status	
Asimov	Orlando	Active	Details Assign Plans Delete Employee
Bender	Neil	Active	Details Assign Plans Delete Employee
Cattan	Michele	Active	Details Assign Plans Delete Employee
Davidoff	Larry	Active	Details Assign Plans Delete Employee

- Once you click the [Delete Employee](#) link, a pop-up message will ask you to confirm your request. Click the OK button if you are certain about deleting the employee.

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Windows Internet Explorer

Are you sure you want to delete all information for this employee? Once the information has been deleted it cannot be retrieved.

[OK](#) [Cancel](#)

Asimov	Kristie	Active	Details Assign Plans Delete Employee
Fielder	Jacques	Active	Details Assign Plans Delete Employee

Employee Access

One of the benefits of HRConnect is its accessibility to employees, allowing them to access the system to view their plan information, complete enrollment paperwork, make address changes, and so on. For employees to gain access to HRConnect, they must have a valid e-mail address. Then, the HR Administrator must create employee accounts in HRConnect and grant them access to the system.

Creating an Employee User Account:

For All Employees:

1. Go to the Employees section and click the Employee Access link on the main menu at the top of the page.

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Last	First	Employment Status	
Asimov	Orlando	Active	Details Assign Plans Delete Employee
Bender	Neil	Active	Details Assign Plans Delete Employee
Cattan	Michele	Active	Details Assign Plans Delete Employee
Micheletti	Christina	Active	Details Assign Plans Delete Employee
Nunez	Ben	Active	Details Assign Plans Delete Employee
O'Brien	April	Active	Details Assign Plans Delete Employee

2. In the *Employee Access* screen, you can efficiently create accounts for all employees by selecting one of the links on the top right menu: Create All, Create and Email All, and Resend All.

Employee Access

Employees can log into HRConnect to review their benefit plans, maintain up-to-date information and view items you post to the Intranet. You can enable and disable employee accounts through the 'Status' links and can email account information through auto emailing.

[Create All](#) [Create and Email All](#) [Resend All](#)

Last	First	User Name	Status	Email	
Asimov	Orlando	OAsimov	Enabled	AO@HRC DG.com	Reset Password Resend Email
Bender	Neil	NBender	Enabled	NB@HRC DG.com	Reset Password Resend Email
Cattan	Michele	MCattan	Enabled	MC@HRC DG.com	Reset Password Resend Email
Davidoff	Larry	LDavidoff	Enabled		Reset Password
Edwards	Kristie	KEdwards1	Enabled		Reset Password
Micheletti	Christina	CMicheletti	Enabled		Reset Password
Nunez	Ben	BNunez	Enabled		Reset Password
O'Brien	April	AOBrien	Enabled	AO@HRC DG.com	Reset Password Resend Email

- a. Selecting *Create All* will create Employee User accounts for all the employees.
- b. Selecting *Create and Email All* will create Employee User accounts for all the employees. The system will also send out e-mails to notify all the employees of their HRConnect login information created by the HR Administrator.
- c. Selecting *Resend All* will prompt the system to send an e-mail to every employee on the list, notifying them of their login information.

EMPLOYEES TAB: EMPLOYEE ACCESS

The system will display a confirmation message once all the user accounts are successfully created.

Employee Access

Employees can log into HRConnect to review their benefit plans, maintain up-to-date information and view items you post to the Intranet. You can enable and disable employee accounts through the 'Status' links and can email account information through auto emailing.

The user accounts were successfully created.

[Create All](#) [Create and Email All](#) [Resend All](#)

Last	First	User Name	Status	Email	
Asimov	Orlando	OAsimov	Enabled	AO@HRC DG.com	Reset Password Resend Email
Bender	Neil	NBender	Enabled	NB@HRC DG.com	Reset Password Resend Email
Cattan	Michele	MCattan	Enabled	MC@HRC DG.com	Reset Password Resend Email
Davidoff	Larry	LDavidoff	Enabled		Reset Password
Edwards	Kristie	KEdwards1	Enabled		Reset Password
Micheletti	Christina	CMicheletti	Enabled		Reset Password
Nunez	Ben	BNunez	Enabled		Reset Password
O'Brien	April	AOBrien	Enabled	AO@HRC DG.com	Reset Password Resend Email

For an Employee:

If you have a new-hire employee, you can give this person access to HRConnect by creating a single Employee Access account.

1. Go to the Employees section and click the [Manage Employees](#) link on the main menu at the top of the page.
2. In the *Manage Employees* screen, add the employee.
3. Next, navigate to the *Employee Access* section. You will find that the new person is now included in the employee list.

[Manage Employees](#) [Employee Access](#) [Company Directory](#) [Census](#)

Employee Access

Employees can log into HRConnect to review their benefit plans, maintain up-to-date information and view items you post to the Intranet. You can enable and disable employee accounts through the 'Status' links and can email account information through auto emailing.

[Create All](#) [Create and Email All](#) [Resend All](#)

Last	First	User Name	Status	Email	
Asimov	Orlando	OAsimov	Enabled	AO@HRC DG.com	Reset Password Resend Email
Bender	Neil	NBender	Enabled	NB@HRC DG.com	Reset Password Resend Email
Cattan	Michele	MCattan	Enabled	MC@HRC DG.com	Reset Password Resend Email
Davidoff	Larry	LDavidoff	Enabled		Reset Password
Edwards	Kristie	KEdwards1	Enabled		Reset Password
Felder	Jacques	JFelder	Enabled		Reset Password
George	Isela	IGeorge	Enabled		Reset Password
Helms	Helena	HHelms	Enabled		Reset Password
Hoss	William			whoss@HRC DG.com	Create Create and Email
Isa	Gina	GIsa	Enabled		Reset Password
Jones	Frank	FJones3	Enabled		Reset Password
Kringle	Edward	EKringle	Enabled		Reset Password

4. Click the [Create](#) or [Create and Email](#) link next to their name.
 - a. Selecting *Create* will create an Employee User account for the new employee.
 - b. Selecting *Create and Email* will create an Employee User account, as well as prompt the system to send an e-mail to the new employee, providing this person their HRConnect login information created by the HR Administrator.

Resetting a User Password:

If an employee loses or forgets his/her password, you can reset it and resend the login information via e-mail by respectively clicking the [Reset Password](#) and [Resend Email](#) links next to his/her name (item #1 below).

Employee Access

Employees can log into HRConnect to review their HR plans, maintain up-to-date information and view items you post to the Intranet. You can enable and disable employee accounts through the 'Status' links and can email account information through auto emailing.

[Create All](#) [Create and Email All](#) [Resend All](#)

Last	First	User Name	Status	Email	
Asimov	Orlando	OAsimov	Enabled	AO@HRC.DG.com	Reset Password Resend Email
Bender	Neil	NBender	Enabled	NB@HRC.DG.com	Reset Password Resend Email
Cattan	Michele	MCattan	Enabled	MC@HRC.DG.com	Reset Password Resend Email
Davidoff	Larry	LDavidoff	Enabled		Reset Password
Edwards	Kristie	KEdwards1	Enabled		Reset Password
Micheletti	Christina	CMicheletti	Enabled		Reset Password
Nunez	Ben	BNunez	Enabled		Reset Password
O'Brien	April	AOBrien	Enabled	AO@HRC.DG.com	Reset Password Resend Email

Revoking User Access:

You can also revoke an employee's access to the HRConnect Web site. Under the *Status* column, click the [Enabled](#) link next to the employee's name to modify his/her Status to *Inactive* (item #2 above).

This is the recommended procedure for maintaining records of employees who leave the company.

Company Directory

The Company Directory, which can be accessed on the main menu of the Employees section, is available to both HR Administrators and employees. The data on this directory are obtained from the *Manage Employees* section; you cannot modify any information directly from this section.

Manage Employees Employee Access **Company Directory** Census

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Last ▲	First	Employment Status			
Asimov	Orlando	Active	Details	Assign Plans	Delete Employee
Bender	Neil	Active	Details	Assign Plans	Delete Employee
Cattan	Michele	Active	Details	Assign Plans	Delete Employee
Davidoff	Larry	Active	Details	Assign Plans	Delete Employee
Edwards	Kristie	Active	Details	Assign Plans	Delete Employee
Micheletti	Christina	Active	Details	Assign Plans	Delete Employee
Nunez	Ben	Active	Details	Assign Plans	Delete Employee
O'Brien	April	Active	Details	Assign Plans	Delete Employee

A read-only page, the Company Directory displays a list of names, office locations, office phone numbers, and business e-mail addresses for each employee entered into HRConnect. Please note: For security purposes, no personal information is available on this page.

Company Directory				
First Name	Last Name ▲	Office	Office Phone	Email
Orlando	Asimov	123 Main St	(650)555-9876 x100	AO@HRCDG.com
Neil	Bender	123 Main St	(650)555-9876 x101	NB@HRCDG.com
Michele	Cattan	123 Main St	(650)555-9876 x102	MC@HRCDG.com
Larry	Davidoff			
Kristie	Edwards			
Jacques	Fielder			
Isela	George			
Helena	Helms			
Gina	Isa			
Frank	Jones			
Edward	Kringle			
David	Lane			
Christina	Micheletti			
Ben	Nunez			
April	O'Brien			AO@HRCDG.com

EMPLOYEES TAB

Census

You can access your company's complete census list on the main menu of the Employees section, under Census.

Manage Employees Employee Access Company Directory **Census**

Manage Employees

This section allows you to track information about existing employees and to register new employees. For existing employees, you can track employment status changes through the 'Employment Status' links, can view and edit employee detailed information through 'Details' links and can indicate employee benefit plan selections through 'Assign Plans' links.

[New Hire](#) [Upload Employee Census](#)

Last ^	First	Employment Status	
Asimov	Orlando	Active	Details Assign Plans Delete Employee
Bender	Neil	Active	Details Assign Plans Delete Employee
Cattan	Michele	Active	Details Assign Plans Delete Employee
Micheletti	Christina	Active	Details Assign Plans Delete Employee
Nunez	Ben	Active	Details Assign Plans Delete Employee
O'Brien	April	Active	Details Assign Plans Delete Employee

It displays a list of all active employees in your group, including their dependent status, birth date, and age (item #1 below).

Manage Employees Employee Access Company Directory **Census**

Census

When renewing or changing plans, review the employee information below. Make any adjustments in the 'Manage Employee' tab. When complete let your agent know that the updated census is available by clicking the 'Notify Agent' link.

1

First Name	Last Name ^	Dependent Status	Quote	Birth Date	Age
Orlando	Asimov	Employee & Child	Y	3/15/1966	42 years 8 months
Neil	Bender	Employee & Spouse	Y	2/14/1967	41 years 9 months
Michele	Cattan	Employee Only	Y	1/13/1968	40 years 10 months
Larry	Davidoff	Employee & Family	Y	12/12/1969	38 years 11 months
Kristie	Edwards	Employee & Child	Y	11/11/1970	38 years 0 months
Jacques	Fielder	Employee & Spouse	Y	10/10/1971	37 years 1 month
Isela	George	Employee Only	Y	9/9/1972	36 years 2 months
Helena	Helms	Employee & Family	Y	8/8/1973	35 years 3 months
Gina	Isa	Employee & Child	Y	7/7/1974	34 years 4 months
Frank	Jones	Employee & Spouse	Y	6/6/1975	33 years 5 months
Edward	Kringle	Employee Only	Y	5/5/1976	32 years 6 months
David	Lane	Employee & Family	Y	4/4/1977	31 years 7 months
Christina	Micheletti	Employee & Child	Y	3/3/1978	30 years 8 months
Ben	Nunez	Employee & Spouse	Y	2/2/1979	29 years 9 months
April	O'Brien	Employee Only	Y	1/1/1980	28 years 10 months

2 [Notify Agent to Synch Census](#)

When you modify the employee census in HRConnect, you have the option to notify your agent via e-mail, so that he/she can update the group's census in LISI's QuoteStar™, Powered by HealthConnect, quoting system. Once you click the Notify Agent to Synch Census link (item #2 above) on the Census page, the system will send your agent an e-mail, informing him/her that your group's current census in HRConnect is available for retrieval. The agent can then facilitate a synchronization of information between the two systems, transferring data from HRConnect to QuoteStar™, Powered by HealthConnect.

This automated process ensures efficiency and accuracy in quoting.

EMPLOYEES TAB: CENSUS

Once the system delivers an e-mail to your agent, you will receive a confirmation message.

Census

When renewing or changing plans, review the employee information below. Make any adjustments in the 'Manage Employee' tab. When complete let your agent know that the updated census is available by clicking the 'Notify Agent' link.

An email has been sent to the agent.

[Notify Agent to Synch Census](#)

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6. BENEFITS TAB

In the Benefits section, you can enter and modify your group's benefit plan information. You can set up classes, add plans, set employer and employee contributions, and assign plans to employees. Click the Benefits Tab on the main menu of the Home section to access the *Plans* section below.

[Setup Classes](#)
[Add Plans](#)
[Contributions](#)
[Assign Plans](#)

Plans Filter by Coverage Type: All ▼

Select a line of coverage to review or update the company's plan benefits, rates and assignments from this page. The benefits entered will show the services the plan will cover for the employee assigned to it. The rates entered will be used in determining plan costs for both employer and employee based on the plan(s) to which employees are assigned. Once the changes are complete, click on "Update" to finalize the entries.

Health (1 plans)

Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross	Lumenos HSA 1500 Plan	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

Dental (1 plans)

Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross PPO	Dental Blue Platinum Plus 100-80th UCR	Dental	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

* All benefits information displayed on this website is for comparative and informational purposes only. The intent is to briefly highlight key features of your plan and is not to replace your insurance contract or booklet. If your specific questions are not addressed, you should contact the insurance carrier or refer to their booklet or contract for more specific information and limitations. Actual claims paid are subject to the terms and conditions of the individual carrier's contracts. Premiums and rates are based on enrollment at the effective date. This website does not enroll any employees or communicate directly with the insurance carriers. You must complete and submit appropriate carrier enrollment forms.

Setting Up Classes

Classes are used to *carve-out* members of a single census into different groups. These different groups may be offered various benefit packages. For example, a company may offer executives a choice of plans, while the rest of the employees may only select from one plan. If you do not intend to offer different benefits to different groups of employees, do not create a new class.

HOW TO SET UP A CLASS:

1. In the *Class Name* column, enter the name of the class you would like to set up (item #1 below). **Please note:** The *HotKey* functionality has been removed from the system; therefore, leave this column blank.

Setup Classes

[Help](#)
[Update](#)

Classes are used to "carve-out" members of a single census into different groups. These different groups can be offered different benefit packages. For example, a company may offer executives a choice of plans while the rest of the employees can only select from one plan. If you do not intend to offer different benefits to different groups of employees, do not create any new classes.

1

Del?	Class Name *	HotKey
Add -->	<input type="text"/>	<input type="text"/>

Note: Hotkey value can be one digit, letter or blank
* indicates required field

[Help](#)
[Update](#)

2. Click the Update link (highlighted above).

You can enter as many classes as necessary. If you enter a class in error or it is no longer used, mark the checkbox in the *Del?* column next to the class to delete it from the list (item #2 below).

Del?	Class Name *	HotKey
<input type="checkbox"/>	Exempt	E
<input checked="" type="checkbox"/>	Hourly	H
<input type="checkbox"/>	Management	M

2

An example of a completed class setup:

Setup Classes

[Help](#)
[Update](#)

Classes are used to "carve-out" members of a single census into different groups. These different groups can be offered different benefit packages. For example, a company may offer executives a choice of plans while the rest of the employees can only select from one plan. If you do not intend to offer different benefits to different groups of employees, do not create any new classes.

Del?	Class Name *	HotKey
<input type="checkbox"/>	Exempt	E
<input type="checkbox"/>	Hourly	H
<input type="checkbox"/>	Management	M
<input type="checkbox"/>	Temporary	T
Add -->	<input type="text"/>	<input type="text"/>

Note: Hotkey value can be one digit, letter or blank
* indicates required field

[Help](#)
[Update](#)

Important Note: Once you set up classes, you must assign each class to a plan, as well as assign each employee to a class to ensure that the system functionality will work correctly with your class structure.

Adding Plans

HRConnect stores most small group medical and ancillary benefit plans available in California. However, there may be plans currently not available in the system, so you may need to add a plan. Plans chosen by a group must be entered when the group is deployed in HRConnect.

In addition to being able to add medical, dental, life or vision plans, you can also add other plan types such as 401(k)/403(b), Short and Long-Term Disability, and Long-Term Care. You can add both plan benefits and rates for these ancillary plans.

How to Add a Plan to HRConnect:

1. Click the [Add Plans](#) link on the main menu.

[Setup Classes](#) **[Add Plans](#)** [Contributions](#) [Assign Plans](#)

Plans Filter by Coverage Type: All

Select a line of coverage to review or update the company's plan benefits, rates and assignments from this page. The benefits entered will show the services the plan will cover for the employee assigned to it. The rates entered will be used in determining plan costs for both employer and employee based on the plan(s) to which employees are assigned. Once the changes are complete, click on "Update" to finalize the entries.

Health (1 plans)							
Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross	Lumenos HSA 1500 Plan	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

Dental (1 plans)							
Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross PPO	Dental Blue Platinum Plus 100-80th UCR	Dental	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

2. In the *Add Plan* page, mark whether or not you will set up classes for the group (item #1 below), then click the [Update](#) link right below.

[Plans](#) [Setup Classes](#) [Contributions](#) [Assign Plans](#)

Add Plans

Select the class(es) and line of coverage that the new plan applies to. Enter the plan rate information on the Rates page and click on "Update" once the entries are complete. To enter the new plan's benefit information, click on the Plan Details link located on top of the Rates page. Click on "Update" to finalize the entries.

Will classes be set up for this group? ☐ Yes ☒ No **1**

[Update](#)

Select Line of Coverage: Select **2**

3. Next, select in the drop-down menu the line of coverage you wish to add (item #2 above).

BENEFITS TAB: ADDING PLANS

- Your selection will direct you to the *Rates* page, where you can enter your group's carrier, plan name and type, effective date, and policy number (item #1 below).

The screenshot shows the 'Plan Details' form. A red box labeled '1' encompasses the 'Carrier Details' and 'Plan Details' sections. Another red box labeled '2' encompasses the 'Rates' section. The 'Carrier Details' section includes a 'Carrier' dropdown menu set to 'Other Carrier' and an 'Other Carrier' text field. The 'Plan Details' section includes a 'Plan' text field, a 'Type' dropdown menu set to 'Other', an 'Other Type' text field, an 'Effective Date' text field, and a 'Policy Number' text field. The 'Rates' section includes a 'Plan Type' section with radio buttons for 'Tier' and 'Employee'.

- Under the *Rates* section (item #2 above), choose either *Tier* (Composite) or *Employee* (Age-Banded) for Plan Type.
- After making your plan type selection, the system will expand the *Rate* section, enabling you to manually add rates for your new plan. Click the Update link after you input the rates.

The screenshot shows the 'Rates' form. A red box labeled '1' encompasses the 'Plan Type' section, which includes radio buttons for 'Tier' and 'Employee'. Below this, the 'Plan Tier' section includes radio buttons for '2', '3', '4', '5', and '6'. The 'Single' section includes a text field for '\$400.00'. The 'Spouse' section includes a text field for '\$750.00'. The 'Child' section includes a text field for '\$600.00'. The 'Family' section includes a text field for '\$1000.00'. At the bottom right, there is an 'Update' button and a 'Back' link. A lightning bolt icon is visible between the 'Plan' and 'Policy Number' fields.

* All benefits information displayed on this website is for comparative and informational purposes only. The intent is to briefly highlight key features of your plan and is not to replace your insurance contract or booklet. If your specific questions are not addressed, you should contact the insurance carrier or refer to their booklet or contract for more specific information and limitations. Actual claims paid are subject to the terms and conditions of the individual carrier's contracts. Premiums and rates are based on enrollment at the effective date. This website does not enroll any employees or communicate directly with the insurance carriers. You must complete and submit appropriate carrier enrollment forms.

BENEFITS TAB: ADDING PLANS

7. Once the *Rates* section is updated, click the [Plan Details](#) link at the top of the page.

[Plan Details](#)

Rates

Carrier Details

Carrier: Other Carrier

Other Carrier:

Plan Details

Plan:

Type: Other

Other Type:

8. Enter your group's plan benefits on the *Plan Details* page.

[Plan Rates](#)

Plan Benefits

Health

Carrier: Assurant

Plan Name: PPO 90/70 \$500

Product: PPO

Policy Number: AC1234

Effective Date: 11/1/2008

Drug card

Benefit	InNet	OutNet	OutNet2
Deductible	<input type="text"/>	<input type="text"/>	<input type="text"/>
Family Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
OOP Max Single	<input type="text"/>	<input type="text"/>	<input type="text"/>
OOP Max Family	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lifetime Max Medical	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lifetime max N&M	<input type="text"/>	<input type="text"/>	<input type="text"/>
Inpatient	<input type="text"/>	<input type="text"/>	<input type="text"/>
Outpatient Surgery	<input type="text"/>	<input type="text"/>	<input type="text"/>
Emergency Room	<input type="text"/>	<input type="text"/>	<input type="text"/>

Brand

Oral Contraceptives

Mail Order

* All benefits information displayed on this website is for comparative and informational purposes only. The intent is to briefly highlight key features of your plan and is not to replace your insurance contract or booklet. If your specific questions are not addressed, you should contact the insurance carrier or refer to their booklet or contract for more specific information and limitations. Actual claims paid are subject to the terms and conditions of the individual carrier's contracts. Premiums and rates are based on enrollment at the effective date. This website does not enroll any employees or communicate directly with the insurance carriers. You must complete and submit appropriate carrier enrollment forms.

[Update](#) [Back](#)

[Add Section](#) [Read-Only View](#)

BENEFITS TAB: ADDING PLANS

9. After entering all the information on the *Plan Benefits* page, click the [Update](#) link to save the data. You can also click the [Read-Only View](#) link to see how the Plan Benefits page will look when an employee views this page (both highlighted on the previous page).
- a. The *Read-Only Preview* mode of a group's plan benefits:

Plan Benefits

Health

Carrier:	Assurant
Plan Name:	PPO 90/70 \$500
Product:	PPO
Policy Number:	AC1234
Effective Date:	11/1/2008

Drug card \$10/\$25

Benefit	InNet	OutNet
Deductible	\$500	\$1,000
Family Limit	\$1,000	\$2,000
OOP Max Single	\$3,000	\$6,000
OOP Max Family	\$6,000	\$12,000
Lifetime Max Medical	\$5,000,000	\$5,000,000
Lifetime max N&M		
Inpatient	90%	70%
Outpatient Surgery	90%	70%
Emergency Room	90%	90%
Hospice		
Skilled Nursing		
Office Visit	\$25 Copay	70%
Maternity		
Chiropractic		
Physical Therapy		
Home Health		

10. In the *Add Plans* page, click the [Plans](#) link above to view your current plan listing. Your new plan will now appear in the *Plans* list.

[Setup Classes](#)
[Add Plans](#)
[Contributions](#)
[Assign Plans](#)

Plans

Filter by Coverage Type: All ▼

Select a line of coverage to review or update the company's plan benefits, rates and assignments from this page. The benefits entered will show the services the plan will cover for the employee assigned to it. The rates entered will be used in determining plan costs for both employer and employee based on the plan(s) to which employees are assigned. Once the changes are complete, click on "Update" to finalize the entries.

Health (2 plans)

Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross	Lumenos HSA 1500 Plan	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active
Assurant	PPO 90/70 \$500	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

Dental (1 plans)

Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross PPO	Dental Blue Platinum Plus 100-80th UCR	Dental	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

BENEFITS TAB: ADDING PLANS

HOW TO ADD A CUSTOM PLAN TO HRCONNECT BY EDITING AN EXISTING PLAN:

When you deploy a group for the first time or add a plan to a group you already deployed, you can choose from any of the Small Group plans available in HRConnect. However, your company may offer a plan that is not available in the system. When this is the case, you can add a similar plan already available in the system, and then edit that plan so that it matches your company's actual plan.

1. In the previous section titled, *How to Add a Plan to HRConnect*, follow the steps for adding a plan.
 - a. Make sure you pick a plan from the list of Small Group plans available in the system that is similar to what is currently being offered to your group.
2. Click the Edit Benefits link next to the plan name you wish to modify.

The screenshot shows the 'Plans' section of the HRConnect interface. At the top, there are tabs for 'Setup Classes', 'Add Plans', 'Contributions', and 'Assign Plans'. Below these is a 'Plans' header with a 'Filter by Coverage Type' dropdown set to 'All'. A descriptive paragraph explains that users can review or update plan benefits, rates, and assignments. Below this is a table titled 'Health (2 plans)'. The table has columns: Carrier, Plan Name, Type, Effective Date, Action (View), Action (Edit), Action, and Compare. The first row shows 'Anthem Blue Cross' as the carrier and 'Lumenos HSA 1500 Plan' as the plan name. The 'Effective Date' is '11/1/2008'. In the 'Action (Edit)' column, the 'Edit Benefits' link is highlighted with a red box. Other links in the same row include 'View Benefits', 'View Plan/Rates', 'Assign Classes', 'Delete', and 'Active'.

Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross	Lumenos HSA 1500 Plan	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

3. Add, delete, and update the benefits within the existing plan as needed to match your current plan benefits (item 1 below). Click Update to save your changes.

The screenshot shows the 'Plan Benefits' page for the 'Lumenos HSA 1500 Plan'. The page is divided into sections: 'Health' (Carrier: Anthem Blue Cross, Plan Name: Lumenos HSA 1500 Plan, Product: PPO, Policy Number: 123456, Effective Date: 11/1/2008), 'Drug card' (100% after Ded/100%), and a table of benefits. The 'Effective Date' field is highlighted with a red box and the number '1'. The 'Update' button at the bottom right is also highlighted with a red box. The 'Add Section' and 'Read-Only View' links are at the bottom.

Benefit	InNet	OutNet	OutNet2
Deductible	\$1500	\$1500	
Co-insurance	100%	70%	
Copay	100%	70%	
Out of Pocket	\$1,500	\$3,000	
Out of Pocket Family	\$3,000	\$6,000	
Hospital Copay	100%	B/C Pays \$650/Day	
Network Reimbursement Basis	Coinsurance is percent	Limited fee schedule	
Family Limit	\$3,000 Family aggregate	\$3,000 Family aggregate	

Ambulance	100% after ded.	100% of C & R after ded.	
Generic	100% after ded (30 day supply)	70% (After ded) of Dru	
Brand	100% after ded (30 day supply)	70% (After ded) of Dru	
Oral Contraceptives	Included	Included	
Mail Order	Up to a 90 day supply	Up to a 90 day supply	

[Update](#) [Back](#)
[Add Section](#) [Read-Only View](#)

BENEFITS TAB: ADDING PLANS

Important Note: If you are making numerous changes, we recommend you save frequently because HRConnect will time-out after a period of inactivity. Click the [Update](#) link on the bottom right corner of the page after every five to ten changes you make to avoid losing data and logging onto the system again.

4. Once you complete editing the plan benefits to match your group's current plan, click the [Edit Plan/Rates](#) link next to the plan you are changing.

[Setup Classes](#)
[Add Plans](#)
[Contributions](#)
[Assign Plans](#)

Plans

Filter by Coverage Type: All

Select a line of coverage to review or update the company's plan benefits, rates and assignments from this page. The benefits entered will show the services the plan will cover for the employee assigned to it. The rates entered will be used in determining plan costs for both employer and employee based on the plan(s) to which employees are assigned. Once the changes are complete, click on "Update" to finalize the entries.

Health (2 plans)							
Carrier	Plan Name	Type	Effective Date	Action (View)	Action (Edit)	Action	Compare
Anthem Blue Cross	Lumenos HSA 1500 Plan	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active
Assurant	PPO 90/70 \$500	PPO	11/1/2008	View Benefits View Plan/Rates	Edit Benefits Edit Plan/Rates	Assign Classes Delete	Active

5. Change the name of the carrier, plan name, plan type, effective date, and policy number of the plan to match your group's current plan.
6. Next, edit the rates.
 - a. If your group has age-banded rates, click the *Employee* button next to plan type under the *Rates* subsection. You must enter each person's employee- and dependent-only rates.

Rates

Carrier Details

Carrier: Other Carrier

Other Carrier: Anthem Blue Cross

Plan Details

Plan: Lumenos HSA 1500 Plan

Type: Preferred Provider Organization

Other Type:

Effective Date: 11/1/2008

Policy Number: 123456

Rates

Plan Type: ☐ Tier ☒ Employee

First Name	Last Name	Status	DOB	Employee Rate	Dependent Rate	Total Rate
Orlando	Asimov	Employee & Child	3/15/1966	399.00	223.00	622.00
Neil	Bender	Employee & Spouse	2/14/1967	399.00	416.00	815.00
Michele	Cattan	Employee Only	1/13/1968	399.00	0	399.00
Larry	Davidoff	Employee & Family	12/12/1969	275.00	495.00	770.00

BENEFITS TAB: ADDING PLANS

- b. If your group has composite rates, click the *Tier* button next to the plan type under the *Rates* subsection. You must choose how many rate tiers (two to five) your plan has and enter the associated rate for each tier.

Rates	
Carrier Details	
Carrier:	Other Carrier ▼
Other Carrier:	Anthem Blue Cross
Plan Details	
Plan:	Lumenos HSA 1500 Plan
Type:	Preferred Provider Organization ▼
Other Type:	
Effective Date:	11/1/2008
Policy Number:	123456
Rates	
Plan Type:	<input checked="" type="radio"/> Tier <input type="radio"/> Employee
Plan Tier:	<input type="radio"/> 2 <input type="radio"/> 3 <input checked="" type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6
Single	\$0.00
Spouse	\$0.00
Child	\$0.00
Family	\$0.00

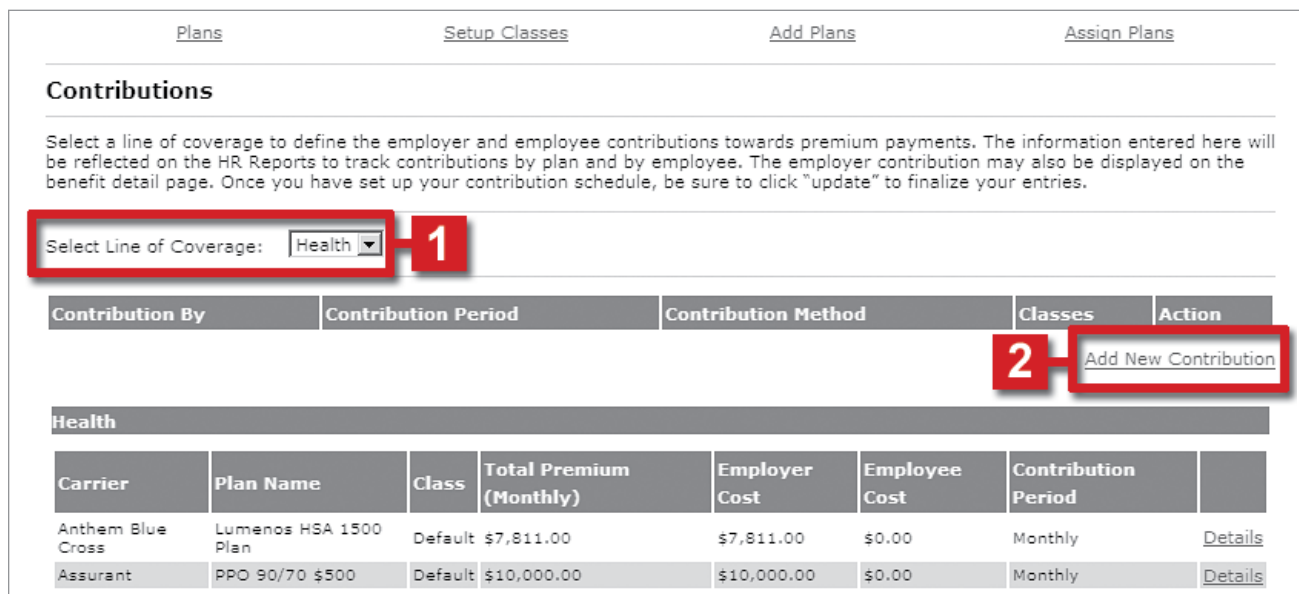
7. Click the Update link at the bottom of the page to save your changes.

Contributions

In the *Contributions* section of the Benefits section, you can enter employer or employee contributions for any plans that you set up in HRConnect.

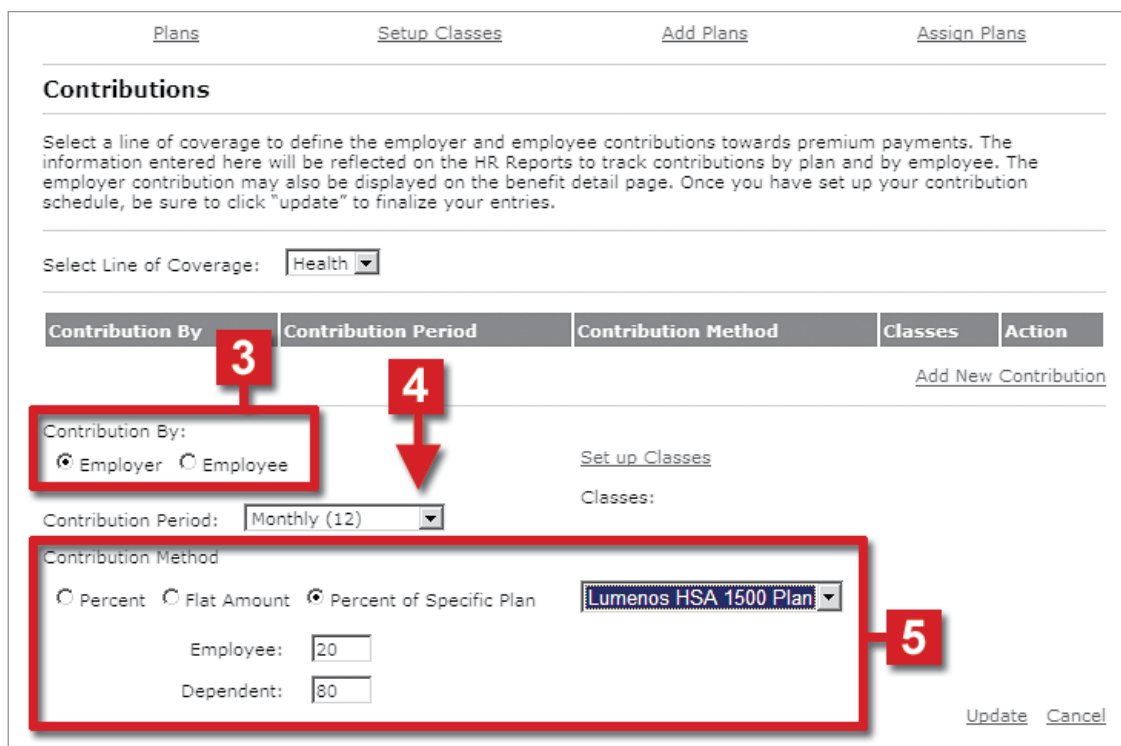
How to Add Contributions:

1. Select a line of coverage from the drop-down menu (item #1 below). Then, click the Add New Contribution link (item #2 below).



The screenshot shows the 'Contributions' section of the HRConnect interface. At the top, there are four tabs: 'Plans', 'Setup Classes', 'Add Plans', and 'Assign Plans'. Below the tabs is a heading 'Contributions' followed by a descriptive paragraph. A red box labeled '1' highlights the 'Select Line of Coverage:' dropdown menu, which currently shows 'Health'. To the right of this dropdown, a red box labeled '2' highlights the 'Add New Contribution' link. Below these elements is a table with columns: 'Contribution By', 'Contribution Period', 'Contribution Method', 'Classes', and 'Action'. Under the 'Health' section, there is a table with columns: 'Carrier', 'Plan Name', 'Class', 'Total Premium (Monthly)', 'Employer Cost', 'Employee Cost', 'Contribution Period', and 'Details'. The table lists two plans: 'Anthem Blue Cross' (Lumenos HSA 1500 Plan) and 'Assurant' (PPO 90/70 \$500).

2. Next, specify who is making the contribution, the *Employer* or *Employee* (item #3 below).



The screenshot shows the 'Contributions' section of the HRConnect interface, continuing from the previous step. A red box labeled '3' highlights the 'Contribution By:' dropdown menu, which has radio buttons for 'Employer' (selected) and 'Employee'. A red box labeled '4' highlights the 'Contribution Period:' dropdown menu, which shows 'Monthly (12)'. A red box labeled '5' highlights the 'Contribution Method' section, which has radio buttons for 'Percent', 'Flat Amount', and 'Percent of Specific Plan' (selected). Below these radio buttons are input fields for 'Employee:' (20) and 'Dependent:' (80). A dropdown menu for 'Lumenos HSA 1500 Plan' is also visible. At the bottom right, there are 'Update' and 'Cancel' buttons.

BENEFITS TAB: CONTRIBUTIONS

3. Select a contribution period from the drop-down menu (item #4 on previous page).
4. Choose the method of contribution: *Percent*, *Flat Amount* or *Percent of a Specific Plan* (item #5 on previous page). If you select *Percent of a Specific Plan*, you must choose a base plan from the drop-down menu. In our example on the previous page, we selected *Anthem Blue Cross Lumenos 1500 Plan* as the base plan upon which contributions are calculated.
5. Specify the amount of contribution both the employee and dependent will make. We specified in our example that the employer will contribute 80%, with the employee responsible for the remaining 20%. Finally, click the [Update](#) link to save the data.

Employer and employee contributions are now set for a health plan.

Assigning Plans

To take advantage of the numerous employee and administrator features in HRConnect, employees must be assigned to plans—medical or ancillary—you set up in the system. There are two ways plans can be assigned to an employee:

1. Assign a plan, one at a time, to each employee.
2. Assign plans to **all** employees all at once (a faster and more efficient process illustrated below).

HOW TO ASSIGN PLANS TO ALL EMPLOYEES:

1. In the Benefits section, click the [Assign Plans](#) link on the main menu.
2. Select a type of effective date: *Current* applies to plans that are already in effect, and *Enrolling* refers to future enrollments.

[Plans](#)
[Setup Classes](#)
[Add Plans](#)
[Contributions](#)

Assign Plans

Select a line of coverage that needs plans assigned to employees. Select a plan to assign to the employee after the displayed employee Class have been verified to be correct. Review the rates that are automatically displayed after a plan has been selected and modify as needed. Once the changes are complete, click on "Update" to finalize the entries.

Select Line of Coverage: Select Effective Date: ☒ Current ☐ Enrolling

3. Specify the type of plans you will assign to the employees by selecting a line of coverage from the drop-down menu.

[Plans](#)
[Setup Classes](#)
[Add Plans](#)
[Contributions](#)

Assign Plans

Select a line of coverage that needs plans assigned to employees. Select a plan to assign to the employee after the displayed employee Class have been verified to be correct. Review the rates that are automatically displayed after a plan has been selected and modify as needed. Once the changes are complete, click on "Update" to finalize the entries.

Select Line of Coverage: Health Effective Date: ☒ Current ☐ Enrolling

Name	Date of Birth	Status	Zip	Class	Plan	EE Rate	Dep Rate	Total Rate	Employer Cost	Employee Cost
Asimov, Orlando	03/15/1966	Employee & Child	94025	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Bender, Neil	02/14/1967	Employee & Spouse	94002	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Cattan, Michele	01/13/1968	Employee Only	94404	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Davidoff, Larry	12/12/1969	Employee & Family	94403	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Edwards, Kristie	11/11/1970	Employee & Child	94402	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Felder, Jacques	10/10/1971	Employee & Spouse	94401	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
George, Isela	09/09/1972	Employee Only	94010	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Helms, Helena	08/08/1973	Employee & Family	94030	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00

BENEFITS TAB: ASSIGNING PLANS

- Then, specify a plan the employee is currently on or enrolling in by choosing an option in the drop-down menu under the *Plan* column.

Select Line of Coverage: Health Effective Date: ☒ Current ☐ Enrolling

Name	Date of Birth	Status	Zip	Class	Plan	EE Rate	Dep Rate	Total Rate	Employer Cost	Employee Cost
Asimov, Orlando	03/15/1966	Employee & Child	94025	Default	Lumenos HSA 1500 Pl	399.00	223.00	622.00	258.2	363.8
Bender, Neil	02/14/1967	Employee & Spouse	94002	Default	Lumenos HSA 1500 Pl	399.00	416.00	815.00	412.6	402.4
Cattan, Michele	01/13/1968	Employee Only	94404	Default	Lumenos HSA 1500 Pl	399.00	0.00	399.00	79.8	319.2
Davidoff, Larry	12/12/1969	Employee & Family	94403	Default	Lumenos HSA 1500 Pl	275.00	495.00	770.00	451	319
Edwards, Kristie	11/11/1970	Employee & Child	94402	Default	Lumenos HSA 1500 Pl	275.00	203.00	478.00	217.4	260.6
Fielder, Jacques	10/10/1971	Employee & Spouse	94401	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Jones, Frank	06/06/1975	Employee & Spouse	94080	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Kringle, Edward	05/05/1976	Employee Only	94015	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Lane, David	04/04/1977	Employee & Family	94010	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Micheletti, Christina	03/03/1978	Employee & Child	94123	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
Nunez, Ben	02/02/1979	Employee & Spouse	94109	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00
O'Brien, April	01/01/1980	Employee Only	94107	Default	Select a Plan	0.00	0.00	0.00	0.00	0.00

[Update](#)

- On this page, you are able to change an employee's family status, as well as class, if you have previously set up Classes.
- Once you change an employee's plan choice, the system will refresh and display the latest rate information for that employee.

- After you complete your modifications, click the [Update](#) link (highlighted above) to save your selections.

The system will display a confirmation message once you complete assigning plans to all employees.

[Plans](#) [Setup Classes](#) [Add Plans](#) [Contributions](#)

Assign Plans

Select a line of coverage that needs plans assigned to employees. Select a plan to assign to the employee after the displayed employee Class have been verified to be correct. Review the rates that are automatically displayed after a plan has been selected and modify as needed. Once the changes are complete, click on "Update" to finalize the entries.

Plans have been assigned.

Select Line of Coverage: Health Effective Date: ☒ Current ☐ Enrolling

Name	Date of Birth	Status	Zip	Class	Plan	EE Rate	Dep Rate	Total Rate	Employer Cost	Employee Cost
Asimov, Orlando	03/15/1966	Employee & Child	94025	Default	Lumenos HSA 1500 Pl	399.00	223.00	622.00	258.20	363.80
Bender, Neil	02/14/1967	Employee & Spouse	94002	Default	Lumenos HSA 1500 Pl	399.00	416.00	815.00	412.60	402.40
Cattan, Michele	01/13/1968	Employee Only	94404	Default	Lumenos HSA 1500 Pl	399.00	0.00	399.00	79.80	319.20
Davidoff, Larry	12/12/1969	Employee & Family	94403	Default	Lumenos HSA 1500 Pl	275.00	495.00	770.00	451.00	319.00
Edwards, Kristie	11/11/1970	Employee & Child	94402	Default	Lumenos HSA 1500 Pl	275.00	203.00	478.00	217.40	260.60

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7. ENROLLMENT TAB

In the Enrollment section, you can complete the master group application for medical and dental coverage through a select list of carriers. You can also view the status of the employees' applications, as well as print copies for their records.

It is advantageous to use this section during your groups' Open Enrollment period—the processes of completing and collecting enrollment applications are expedited. Online enrollment in HRConnect ensures that employees fill in all required information, allowing them to submit complete, signature-ready applications. This reduces processing time and errors in applications.

CARRIERS CURRENTLY AVAILABLE IN HRCONNECT FOR 2–50 GROUPS:

MEDICAL AND/OR DENTAL

- Aetna
- Anthem Blue Cross
- Blue Shield
- CaliforniaChoice®
- Health Net
- Kaiser Permanente
- Kaiser Permanente Choice Solution
- PacifiCare
- Sharp Health Plan
- United HealthCare

DENTAL ONLY

- Safeguard

Additional carrier enrollment forms can be added as needed and can be requested by contacting an HRConnect representative.

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8. INFORMATION TAB

The Information section serves as a repository of information that you can provide to employees to view whenever they access the HRConnect Web site. This section is initially blank, but it can be utilized and filled with any information you choose—there is no limit to what can be added and displayed. Examples of items that can be added include:

BENEFITS SECTION

- Benefits Plan Summary
- Provider List
- Claims Forms
- Company Contact Sheets

COMPANY SECTION

- Company Contact Sheets
- Merchandise Catalog
- Employee Handbook

HOW TO ADD ITEMS TO A SECTION:

1. Click the [Add Section](#) link.

The screenshot shows the HRConnect web application interface. At the top, there is a navigation bar with tabs: Home, Employees, Benefits, Enrollment, Information (selected), Reports, Help, Payroll, COBRA, FSA/POP, and EAP. Below the navigation bar is a 'Log Out' link. The main content area displays the message 'You do not have any sections on this page.' In the bottom right corner of this area, there is a red-bordered button labeled 'Add Section'. At the bottom of the page, there is a copyright notice: 'Copyright © 2008 HealthConnect Systems. All rights reserved. All final binding information must be received directly from the insurance carrier. Server-13'.

2. On the *Add Section* page, enter a section title (required) and a description (if needed). You can enter a number of items to display in *Compact View*, as well as effective and expiration dates for displaying the section. Then, click the [Add](#) link.

The screenshot shows the 'Add Section' form. It has a dark blue header with the text 'Add Section'. Below the header, there are several input fields: 'Title *' (required), 'Description (can leave blank)', 'Number of Items to Display in Compact View' (with a value of 5), 'Effective Date (leave blank if always available)', and 'Expiration Date (leave blank if always available)'. Each date field has a calendar icon. At the bottom of the form, there are two buttons: 'Add' and 'Cancel'. The 'Add' button is highlighted with a red box.

INFORMATION TAB

3. After adding a section, you will return to the Information section. In the new section header, click the [Add Item](#) link to specify what information you wish to display in this section.



4. Select the type of item to be added from the drop-down menu. Enter an item label, a description (if needed), and effective dates if you want the item to display for a limited period of time. Finally, click the [Add](#) link.

Your item is now displayed on the Information section (item #1 below).



You can create as many sections as you want, with as many items in each section as you need. At any time, you can edit or delete a section or an item by clicking either [Edit](#) or [Delete](#) next to the section or item you wish to change or remove (item #2 above).

9. REPORTS TAB

In the Reports section, you can run instant reports from the data in HRConnect. Each of these reports can be displayed on screen, printed or exported to Microsoft Excel for manipulation and back-up. Reports available in the system:

TITLE	VARIATIONS AVAILABLE
Birthday	All months or by specific month
Emergency Contacts	None
Employee Details	None
Employee Plans	By Effective Date (either currently enrolled or future enrollment option)
Employee Rates	Sort by Name or Coverage Type By Effective Date (either currently enrolled or future enrollment option)
Employee Statistics	None
New Hire	Select Time Period
Service Anniversary	All months or by specific month
Termination	Select Time Period

HOW TO VIEW A REPORT:

1. To view a report, select an option in the drop-down menu. As an example, let's choose the *Birthday* report.

HR Summary Reports

Please select the type of report you would like to view.

Report: [Select] ▼

- [Select]
- Birthday
- Emergency Contact
- Employee Details
- Employee Plans
- Employee Rates
- Employee Statistics
- New Hire
- Service Anniversary
- Termination

2. Then, select the option you wish to see and click the View link (item #1 below). An on-screen report will display below.

HR Summary Reports

Please select the type of report you would like to view.

Report: Birthday ▼

Month: All Months ▼

1 → [View](#)

2 → [Export/Print](#)

Birthdays (All Months) As of 11/13/2008			
First	Last	Dob	Age
April	O'Brien	01-01-1980	28 Years 10 Months
Michele	Cattan	01-13-1968	40 Years 10 Months
Ben	Nunez	02-02-1979	29 Years 9 Months
Neil	Bender	02-14-1967	41 Years 8 Months
Christina	Micheletti	03-03-1978	30 Years 8 Months

REPORTS TAB

3. To export this report or print a copy for your records, click the [Export/Print](#) link above the report information (item #2 on previous page). In the dialogue box, you can select between the option of opening and viewing the report or saving it to your computer.
 - a. If you are exporting the file, it will download in the .xls format and it can be opened in Microsoft Excel.

B20				
	A	B	C	D
1	Birthdays (All Months)			As of 11/13/2008
2	First	Last	Dob	Age
3	April	O'Brien	01-01-1980	28 Years 10 Months
4	Michele	Cattan	01-13-1968	40 Years 10 Months
5	Ben	Nunez	02-02-1979	29 Years 9 Months
6	Neil	Bender	02-14-1967	41 Years 8 Months
7	Christina	Micheletti	03-03-1978	30 Years 8 Months
8	Orlando	Asimov	03-15-1966	42 Years 7 Months
9	David	Lane	04-04-1977	31 Years 7 Months
10	Edward	Kringle	05-05-1976	32 Years 6 Months
11	Frank	Jones	06-06-1975	33 Years 5 Months
12	Gina	Isa	07-07-1974	34 Years 4 Months
13	Helena	Helms	08-08-1973	35 Years 3 Months
14	Isela	George	09-09-1972	36 Years 2 Months
15	Jacques	Fielder	10-10-1971	37 Years 1 Months
16	Kristie	Edwards	11-11-1970	38 Years 0 Months
17	Larry	Davidoff	12-12-1969	38 Years 11 Months

The report options available in the system are based on the needs of current HRConnect clients. If there is a report you need that is currently not available, HealthConnect may be able to create a new report as long as the information you require is being tracked in the system. Please contact HealthConnect to discuss the feasibility of producing additional reports in the system (refer to the Overview of this manual for contact information).

10. HELP TAB

The Help section contains pre-populated resources geared toward assisting employees using the system. Under this section, employees can refer to the Website Help and Insurance Term Glossary, as well as access links to download computer tools, such as the Adobe PDF viewer, Spyware protection program, Personal Firewall program, and Pop-Up blocker program.

Help		Active	▼	▼	Edit	Delete	Add Item
Website Help	Having problems with the website? Please contact your HR representative or broker.	Active				Delete	Edit 10/29/2008
Glossary		Active	▲	▲	▼	▼	Edit Delete Add Item
Insurance Term Glossary	Confused about an insurance term? Access our glossary for descriptions of many common insurance terms.	Active				Delete	Edit 10/29/2008
Computer Tools		Active	▲	▲		Edit Delete	Add Item
These tools are useful tools for securing and managing your computer. We do not recommend installing these tools without consulting with a computer professional.							
Adobe Reader	Download the latest version of Adobe Reader to view PDF files.	Active			▼	Delete	Edit 10/29/2008
Pop-Up Blocker	This free pop-up blocker is a plug-in from Google that also allows easier access to the Google search engine. Remember to allow pop-ups from this website (our reports and documents load as pop-ups). We never have pop-up advertising.	Active	▲	▲	▼	Delete	Edit 10/29/2008
Spyware Cleaner	Some programs install spyware on your computer that track your web browsing and some even launch pop-ups! This program scans your computer and allows you to clean off the spyware. Free for personal use.	Active	▲	▲	▼	Delete	Edit 10/29/2008
Personal Firewall	Protect yourself from hackers and block unwanted intrusions into your computer. This program can disrupt internet access and should only be installed by advanced computer users. Free for personal use.	Active	▲	▲		Delete	Edit 10/29/2008
Add Section Read-Only Preview							

Any of the pre-populated items on the page can be edited or removed at any time by clicking [Delete](#) or [Edit](#) next to the selected item.

Help		Active	▼	▼	Edit	Delete	Add Item
Website Help	Having problems with the website? Please contact your HR representative or broker.	Active				Delete	Edit 10/29/2008
Glossary		Active	▲	▲	▼	▼	Edit Delete Add Item
Insurance Term Glossary	Confused about an insurance term? Access our glossary for descriptions of many common insurance terms.	Active				Delete	Edit 10/29/2008
Computer Tools		Active	▲	▲		Edit Delete	Add Item
These tools are useful tools for securing and managing your computer. We do not recommend installing these tools without consulting with a computer professional.							
Adobe Reader	Download the latest version of Adobe Reader to view PDF files.	Active			▼	Delete	Edit 10/29/2008
Pop-Up Blocker	This free pop-up blocker is a plug-in from Google that also allows easier access to the Google search engine. Remember to allow pop-ups from this website (our reports and documents load as pop-ups). We never have pop-up advertising.	Active	▲	▲	▼	Delete	Edit 10/29/2008
Spyware Cleaner	Some programs install spyware on your computer that track your web browsing and some even launch pop-ups! This program scans your computer and allows you to clean off the spyware. Free for personal use.	Active	▲	▲	▼	Delete	Edit 10/29/2008
Personal Firewall	Protect yourself from hackers and block unwanted intrusions into your computer. This program can disrupt internet access and should only be installed by advanced computer users. Free for personal use.	Active	▲	▲		Delete	Edit 10/29/2008
Add Section Read-Only Preview							

HELP TAB

An additional section or item can also be added to this page by clicking the [Add Item](#) or [Add Section](#) link.

The screenshot shows the 'Help' tab interface. It contains three main sections: 'Help', 'Glossary', and 'Computer Tools'. Each section has a header bar with 'Active', 'Edit', 'Delete', and 'Add Item' links. The 'Computer Tools' section is expanded, showing a list of items: 'Adobe Reader', 'Pop-Up Blocker', 'Spyware Cleaner', and 'Personal Firewall'. Each item has a description, a status (Active), and a date (10/29/2008). The 'Add Item' link in the 'Computer Tools' section header is highlighted with a red box. Below the 'Computer Tools' section, there are two links: 'Add Section' and 'Read-Only Preview', both highlighted with red boxes.

You can arrange sections or specific items within a section by clicking any of the red arrows on the page. Clicking the arrows in the blue section bar (item #1 below) will move an entire section up or down, while clicking the arrows right next to an item (item #2 below) will move it up or down within the section.

The screenshot shows the 'Help' tab interface with three numbered callouts. Callout 1 points to the 'Add Item' link in the 'Glossary' section header. Callout 2 points to the 'Add Item' link in the 'Computer Tools' section header. Callout 3 points to the 'Read-Only Preview' link below the 'Computer Tools' section. The 'Computer Tools' section is expanded, showing a list of items: 'Adobe Reader', 'Pop-Up Blocker', 'Spyware Cleaner', and 'Personal Firewall'. Each item has a description, a status (Active), and a date (10/29/2008). The 'Add Item' link in the 'Computer Tools' section header is highlighted with a red box.

When you complete your modifications in the Help section, you can view how an employee would see this page by clicking the [Read-Only Preview](#) link below (item #3 above). If you need to make additional changes to the Help section, you can toggle back to the edit mode by clicking the [Edit Mode](#) link.

11. PREMIUM SERVICES

In addition to the basic services provided by HRConnect previously described in this manual, several Premium Services are offered for an additional cost. These services allow a company to integrate payroll, COBRA, FSA/POP, EAP administration, and HR Resources services with HRConnect. HRConnect's vendor partners have been selected because they offer complete, online integration to keep a company's HR system running smoothly and efficiently.

CURRENT PREMIUM SERVICE VENDORS AND SERVICES:


- SurePayroll—Payroll
- TASC—COBRA
- TASC—POP/FSA
- Ceridian—EAP
- HRAnswer Link—HR Resources

With your HRConnect account, five additional tabs are available to you across the top of the screen that tie to each of these Premium Services.

If you need more information about Premium Services or require assistance in setting up any of these services for your company, you will find on each of the Premium Services section a link to submit your contact information, so that an HRConnect representative can be notified to contact you.

Payroll

To obtain more information about SurePayroll and see if their service is a good fit for your company, click the link, [Learn more about the HealthConnect and SurePayroll solution](#), and you will be directed to SurePayroll's Web site.



the employee benefits network

HRConnect now offers an integrated, online payroll, tax filing and direct deposit solution that automates the benefits administration and payroll processing function in a single solution. The advantages to an HR and Payroll administrator are significant:

1. Gain access to an integrated benefits administration, payroll processing, tax filing, direct deposit, HR repository and Employee Self Service application at a fraction of the cost of comparable systems
2. Greatly reduce data entry errors by eliminating the need to maintain 3 separate HR, Payroll and Benefits Administration systems
3. Recapture lost time by processing your complete payroll, tax filing and direct deposit transactions online in less than 2 minutes
4. Web enable your employee's entire payroll history to reduce disruptive requests for pay verification
5. Potentially lower your direct cost for payroll processing by 30 - 40% over comparable national competitors

Click on the link below to learn more about this exciting new solution offered jointly by HealthConnect and SurePayroll.

[Learn more about the HealthConnect and SurePayroll solution](#)

You can enroll online by clicking the link in the *Enroll Today* section on the upper left corner of SurePayroll's home page.



the employee benefits network

Welcome Enroll Now! Resources Login

[Contact Us](#)

Enroll Today

Get Started Today!

[Enroll Online!](#)

Continuing Your Enrollment?

[Click here to continue.](#)

HealthConnect BROKERS

Click here



HealthConnect SurePayroll: A Faster, Simpler Payroll Solution at a Fraction of the Cost

save time

Process your entire payroll in less than five minutes — anywhere, anytime. Once enrolled, simply go online to confirm, update and process payroll.

[Take the HealthConnect SurePayroll Guided Tour](#)

save money

Stop paying double! Compare your current costs for payroll processing with ours. Direct Deposit, Tax Filing, Payroll Reports, and more are all included!

[Please Contact Your Local Insurance Agent for a Quote!](#)

stay in control

No more waiting for anything. You decide when and where to process your payroll. Our exclusive Payroll Preview Screen tells you exactly how much money you need in your account BEFORE you approve payroll. With HealthConnect SurePayroll you know it will be accurate.

[Enroll Online!](#)

Contact HealthConnect SurePayroll

1-866-470-3538, 7 a.m. - 8 p.m. Central Time, Monday through Friday

[Email Us](#)

Paycheck Calculators

New! - Estimate your net or gross pay with our new payroll calculators.

[View Calculators](#)

e-file

HealthConnect SurePayroll is an Authorized IRS e-file for Business Provider

EFTPS®

HealthConnect SurePayroll uses the [Electronic Federal Tax Payment System®](#) for all of our customers.

For additional questions, you can contact HealthConnect SurePayroll at (877) 805.2828, extension 250.

COBRA

Under the COBRA section, you can obtain a marketing brochure about COBRA and forms for enrollment.

COBRA

In general, employers with more than 20 employees are required to comply with the federal law known as COBRA, or Consolidated Omnibus Budget Reconciliation Act of 1985, which requires employers to continue health coverage for their employees following a qualifying event. COBRA non-compliance can expose a company to IRS audits and result in hundreds of thousands of dollars per violation, in addition to litigation from employees who did not receive their health coverage.

Selecting a COBRA service through HRConnect Premium Services will enable you to seamlessly delegate the administrative responsibilities to a COBRA provider who will take care of processing COBRA elections, verification of continued COBRA eligibility, notices of qualifying events, rate and benefit changes, correct forms, recordkeeping, and billing and collection of COBRA premium payments. Once the service is activated, employers answer several questions regarding the qualifying event for which COBRA is being filed. That information will then be forwarded to our COBRA partner who will handle all related duties and your COBRA activities.

Marketing Brochures

[COBRAToday Application Guide](#)

Contracts/Other Documents

[HealthConnect COBRAToday Plan Application](#)

[COBRAToday Takeover Form](#)

[Premium Collection Plan Information](#)

[HRConnect Agreement](#)

[Frequently Asked Questions](#)

Name :

Email :

Phone * () - Extension

[Have a representative contact me about COBRA services](#)

If you require further assistance, click the link, [Have a representative contact me about COBRA services](#). Once you enter your contact information and submit the form, a representative will be notified to contact you.

FSA/POP

Under the FSA/POP section, you can obtain a marketing brochure, as well as forms for enrollment in the FSA/POP services.



Employer Administered FSA

For you, the employer, deciding to go with an FSA is easy. You owe no payroll taxes on FSA contributions - and your tax savings will usually pay for the entire cost of FSA administration. Your decision then becomes one of selecting the best administrator to help you launch or maintain a truly successful FSA plan.

When selecting an FSA administrator, you need to know that they are experienced, competent and committed to superior service. TASC has the communication and service center expertise, backed by sophisticated systems and technology, to make your FSA program successful. We have a staff of benefits professionals who are experts at Section 125 legal and regulatory issues, benefits communication, customer service procedures and claims processing.

Marketing Brochures

[Flex System Application Guide](#)

Contracts/Other Documents

[HealthConnect Flex System Plan Application](#)

[Premium Collection Form](#)

[HRConnect Agreement](#)



Premium Only Plans (POP)

A Premium Only Plan (POP) is an easy, convenient way to increase employee take-home pay and reduce company payroll taxes.

Under POP, which is regulated by Section 125 of the Internal Revenue Code (IRC), your company's taxable payroll can be reduced by the amount employees contribute to certain employer-sponsored group benefit plans ... which **lowers your payroll related taxes** !

With POP, employees' taxable income is also reduced by the amount of their benefits premium contributions, so employees pay less federal, Social Security and Medicare tax (FICA) and most state income taxes and actually **increase their take-home pay** !

Marketing Brochures

[TASC POP Sell Sheet](#)

Contracts/Other Documents

[TASC POP Agreement](#)

[HRConnect Agreement](#)

If you would like to talk to a HealthConnect representative about these services, you can contact (877) 805.2828, extension 250.

EAP

To obtain more information about the Employment Assistance Program (EAP) and to see if their services are a good fit for your company, you can click the link, [Have a representative contact me about the EAP Plan](#), at the bottom of the page (highlighted below). An e-mail will be sent to a representative, notifying to contact you.

Improve the healthy functioning of your managers and employees

With day-to-day challenges around managing families, staying healthy and keeping a positive state of mind, your employees are constantly adapting to change. Providing them an employee assistance plan, or EAP, helps them address these issues as they arise.

With online, telephonic and in-person services, Ceridian's Employee Assistance Program provides employees support with emotional well-being, health, addiction and recovery, and other life events.

By implementing Ceridian Work-Life Services your employees will receive immediate personal service from a team of professionals experienced in culturally-sensitive support, referrals and problem resolution - on both personal and work issues.

Available 24 hours a day, 7 days a week, Ceridian's counseling staff helps employees maneuver a wide range of topics, including:

- Child care and parenting
- Education
- Disability
- Helping aging parents
- Financial issues
- Legal
- Work
- Emotional well-being
- Addiction and recovery
- Midlife and retirement
- Health
- Everyday issues

By adding EAP and Work-Life Services to your benefits package you not only increase productivity, reduce absenteeism and make your company that much more attractive to top talent - you build into your most important asset - your employees.

To see a detailed overview of the specific services available to you, [click here](#).

To review the HRConnect Contract [click here](#).

[Have a representative Contact me about the EAP Plan](#)

HR Resources

Under the HR Resources section, you can obtain information about this product, including the option that helps you build an employee handbook and the *Ask an HR Pro* feature.

Included HR Resources (no cost)

[Glossary of HR Terms](#)
[HR Forms](#)

Premium HR Resources

Employee Handbook: A comprehensive employee handbook is a primary way to prevent [employee lawsuits, conflicts and misunderstandings](#). The employee handbook tool includes a template written by HR professionals and in use across the country. Using the tool, you can quickly and easily download, customize and implement a handbook to add a critical means of protection to your business.

Ask the HR Pro: Human resources issues can be complicated and sensitive. When the most complex or inconvenient problems arise, managers need a cost-effective and confidential source of personalized advice to find the right solution. Consulting with an attorney can be prohibitively expensive. For a small monthly investment, the Ask the HR Pro service puts a team of veteran HR Pros at your fingertips. Whether it is policy set-up, hiring, managing or terminating, the HR Pros quickly and confidentially provide advice whenever the need arises.

Federal and State Employment Laws: HR managers may have questions about federal or state labor laws, for example, am I allowed to run a credit check on an applicant. Using the Federal and State Employment Law service, HR managers can quickly input their question and access an easy to understand summary of relevant labor laws. This self help reference guide can help reduce calls to costly labor attorneys.

Q&A: The Q&A service provides the employer to ask questions and receive automated responses from a library of HR data, e.g. "What is the minimum wage in San Francisco, California?" You can also search on a specific topic, e.g. Minimum Wage Laws.

Job Descriptions and Nationwide HR Forms: A library of job descriptions is available by industry across a wide range of employment area (sales, finance, operations, etc.) In addition, the included forms library above is for your specific state, with the premium services you obtain access to hr forms for all states.

Name *

Email *

Phone * - Extension

[Have a representative contact me about Premium HR Resources](#)

If you need more information about the HR Resources service, complete your contact information and click the link, [Have a representative contact me about Premium HR Resources](#). A representative will be notified to contact you, so that he/she may discuss all the benefits of this service.

APPENDIX

APPENDIX A: PREMIUM SERVICES DETAILED PROPOSAL

Utilized for both new groups and groups already in the quoting system, this is an 11-page proposal with detailed pricing and service descriptions.

APPENDIX B: PREMIUM SERVICES PROPOSAL SUMMARY

Used solely for groups that exist in QuoteStar™, Powered by HealthConnect, this is a two-page proposal with detailed pricing and simplified services descriptions.

APPENDIX C: PREMIUM SERVICES PRICING SUMMARY

Produced for groups already deployed in the HRConnect system, this proposal is generated for groups that would like pricing on HRConnect's Premium Services. This proposal is a one-page detailed pricing sheet with no description of the services provided.

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Premium Services Detailed Proposal

Page 1

HRConnect

An integrated HR, payroll and benefits system.



Through HRConnect Jason's Test Group can:

- Track employee information
- Summarize all benefit plans
- Process payroll
- Administer COBRA, POP and FSA plans
- Access human resource compliance tools and professionals
- Forward employee events to insurance agency automatically
- Receive a single bill for all services

HealthConnect Systems has set up an HRConnect account for Jason's Test Group. To get started, simply login using the following information:

URL: <http://www.ReviewMyBenefits.com>

HR Administrator Username/Password: /

(Password may have been edited by employer)

To learn more about HRConnect, go to <http://www.healthconnectsystems.com/hcs/HRCVideo.aspx>



Premium Services Detailed Proposal

Page 2

HRConnect

What does HRConnect cost?

HRConnect Price Quote for Jason's Test Group (24 employees)

	Set Up	Monthly	+	PEPM	=	Total Monthly	Renewal
Base System *	No Charge	No Charge		No Charge		No Charge	No Charge
Payroll	\$195.00	\$50.00		\$2.65		\$113.60	--
Premium Only Plan	\$195.00	--		--		\$0.00	\$125.00
COBRA	\$95.00	\$50.00		\$0.90		\$71.60	\$75.00
HRAnswerLink	\$195.00	\$99.00		--		\$99.00	--
EAP	\$195.00	--		\$3.95		\$94.80	--
FSA	\$395.00	--		\$6.00		\$144.00	--
FSA w/Debit Card	\$395.00	--		\$8.00		\$192.00	--
Bundled Package (1)	\$560.00	\$140.00		\$3.55		\$225.20	\$200.00
If Purchased Separately	\$680.00	\$199.00		\$3.55		\$284.20	\$200.00
Discount	18%					21%	0%

(1) Bundled package consists of payroll, POP, COBRA and HRAnswerLink.



Premium Services Detailed Proposal

Page 3

HRConnect

How does HRConnect compare?

	Jason's Test Group Expected Current Set Up	Jason's Test Group With HRConnect
Payroll	Yes	Yes
Premium Only Plan	Yes	Yes
Human Resource Management System	No	Yes
Unlimited Online Access to HR Consultants	No	Yes
Benefits Administration System	No	Yes
Insurance Agency Integration	No	Yes
One Single System	No	Yes
Monthly Cost (1)	\$267.00	\$225.20

With HRConnect Jason's Test Group can get more services all in one system at a price comparable to what you are paying currently.

(1) Jason's Test Group current costs are estimated based on average retail pricing of ADP and Paychex for payroll and POP.



Premium Services Detailed Proposal

Page 4

Expression of Interest

Jason's Test Group wishes to learn more about HRConnect and the services marked below!

Employer:	Jason's Test Group
State:	CA
Number of Employees:	24
Contact Name:	_____
Title:	_____
Phone:	_____
Email:	_____
Date/Time for Demo:	_____
Agency/Broker:	JPIS/Jill Piccininno - JPIS
General Agency:	QuoteStar, Powered by HealthConnect
Services(*):	
Payroll:	_____
Premium Only Plan:	_____
COBRA:	_____
HRAnswerLink:	_____
Flexible Spending Account:	_____

** Services can be purchased on a bundled basis or "a la carte."*

Instructions:

Please fax this Expression of Interest to HealthConnect Systems, Attention Sales Department, Fax 559-256-1009. Upon receipt a representative of HealthConnect Systems will contact you at the time specified above to provide an online demonstration of HRConnect.



Premium Services Detailed Proposal

Page 5

HRConnect: Benefits Administration

Benefits Administration System



Benefits Administration System:

- Employee recordkeeping
(address, dependents, emergency contacts, new hires, terminations)
- Benefit plan summaries (deductible, co pays, Rx)
- Forms (enrollment forms, benefit plan change forms)
- Doctors
- Links to carriers
- Insurance agency integration
(agency keeps benefit plans up to date, auto forward employee changes)
- Important company information displayed to employees
(company calendar, company documents, links, announcements)
- Reports (new hires, terminations, birthdays, service anniversaries)
- HR manager and employee access

Key Benefits:

- Manage all HR and benefits in one place in partnership with your insurance agency
- Benefits administration and basic HR system provided at no cost to you by your insurance agency

Underlying Service Provider:

HealthConnect Systems (www.healthconnectsystems.com)

- Leading provider of online HR and employee benefit administration systems
- 6,700 agency clients



Premium Services Detailed Proposal

Page 6

HRConnect: Payroll Processing

Online Payroll Processing



Online Payroll Processing:

- Calculate wages and deductions
- Deduct, deposit and file all federal, state and local taxes
- Keep track of accrual benefits, overtime and bonus pay
- Pay your employees through direct deposit, and notify them via e-mail
- Keep an online record of all payroll and tax information
- Keep you clear of IRS penalties

Complete flexibility for employer to initiate payroll when they want (versus conforming to payroll company's schedule). All payroll data available 24/7 (including ability of employees to access historical paystubs, W-2's, etc.)

Key Benefits:

Better-faster-cheaper versus in house or traditional service bureaus
(ADP and Paychex)

Underlying Service Provider:

Sure Payroll (www.surepayroll.com)

- Largest online payroll company in the United States
- 18,000 companies as clients
- All 50 states
- 98.6% client retention



Premium Services Detailed Proposal

Page 7

HRConnect: COBRA Administration

COBRA Administration



COBRA Administration:

- In general, employers with 20 or more employees are required to comply with the federal mandate known as COBRA (Consolidated Omnibus Budget Reconciliation Act of 1985)
- COBRA is complex and error-prone
- It is very easy for an employer to fall into a state of non-compliance, exposing the company to costly IRS audits and penalties and employee lawsuits

Key Benefits:

Eliminates administrative workload and potential liabilities of complying with COBRA



Premium Services Detailed Proposal

Page 8

HRConnect: Premium Only Plan (POP)

Premium Only Plan (POP)



Premium Only Plan (POP):

- Allows employers to reduce their taxable payroll by the amount employees contribute to certain group sponsored benefit plans, such as medical, which reduces the employers' payroll taxes
- Allows employees to reduce their taxable income by the amount they contribute to their premium payments, which increases their take home pay

Key Benefits:

Easy, convenient and commonly used way to help employees increase their take home pay and employers reduce their payroll taxes



Premium Services Detailed Proposal

Page 9

HRConnect: HR Compliance

HR Compliance and Reference Services



HR Compliance and Reference Services:

- Forms library
(new hires, terminations, worksite postings and other commonly used HR forms)
- Employee handbook builder
- Ask the HR Pro
(email or phone HR consultants with questions)
- Newsletters
- Searchable reference tools of state laws and commonly asked questions

Key Benefits:

Provide self help and online assistance to reduce calls to expensive employment law attorneys*

Underlying Service Provider:

HRAnswerLink (www.hranswerlink.com)

- Leading HR Consulting Company specifically targeting small to mid sized businesses

* This is not a legal service, for legal issues you should consult competent legal professionals.



Premium Services Detailed Proposal

Page 10

HRConnect: Flexible Spending Account

Flexible Spending Account (FSA)



Flexible Spending Account (FSA):

- Allows employees to pay for certain medical, dependent care, and other expenses with pre tax dollars
- Allows employers to reduce their taxable payroll by an amount each employee contributes to the FSA

Key Benefits:

Easy, convenient and commonly used way to help employees increase their take home pay and employers reduce their payroll taxes



Premium Services Detailed Proposal

Page 11

HRConnect: Employee Assistance Plan

Employee Assistance Plan (EAP)



Help employees and supervisors identify and resolve emotional health issues before they become costly workplace issues:

- Counseling (*assessment, assistance and short term counseling*)
- Work and life issues (*child care, elder care, legal matters, financial concerns, retirement planning and concierge services*)
- Online resources (*multi media self help programs and assessments*)

Key Benefits:

- Additional benefit plan for employees
- Improves productivity by addressing emotional issues before they become costly workplace issues

Underlying Service Provider:

Ceridian (www.ceridian.com)

- Leading EAP provider with services offered in over 100 countries
- 110,000 companies with 25 million employees as clients
- New York Stock Exchange listed company



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Premium Services Proposal Summary

Page 1

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(Password may have been edited by employer)

To learn more about HRConnect, go to <http://www.healthconnectsystems.com/hcs/HRCVideo.aspx>

**HR Administrator
Username/Password: /**

Premium Services Proposal Summary

Page 2



HRConnect

What does HRConnect cost?

HRConnect Price Quote for Jason's Test Group (24 employees)

	Set Up	Monthly +	PEPM	=	Total Monthly	Renewal
	No Charge	No Charge	No Charge		No Charge	No Charge
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If Purchased Separately	\$680.00	\$199.00	\$3.55		\$284.20	\$200.00
Discount	18%				21%	0%

(1) Bundled package consists of payroll, POP, COBRA and HRAnswerLink.

Premium Services Pricing Summary

Page 1

HRConnect Pricing

Employee Count: 24

Generate HRConnect Price Quote

Services	Set Up	Monthly Fee	+ PEPM Fee =	Total Monthly	Renewal
HRConnect- Base System	No Charge	No Charge	No Charge	No Charge	No Charge
Payroll	\$195	\$50.00	\$2.65	\$113.60	-
Premium Only Plan	\$195	\$0.00	\$0.00	\$0.00	\$125
COBRA	\$95	\$50.00	\$0.90	\$71.60	\$75
HRAnswerLink	\$195	\$99.00	-	\$99.00	\$0
EAP	\$195	-	\$3.95	\$94.80	-
FSA - Employer Administered	\$995	-	-	\$0.00	\$395
FSA	\$395	\$0.00	\$6.00	\$144.00	-
FSA w/Debit Card	\$395	\$0.00	\$8.00	\$192.00	-
Bundled Package(1)	\$560	\$140.00	\$3.55	\$225.20	\$200
If Purchased Separately	\$680	\$199.00	\$3.55	\$284.20	\$200
Discount	18%	30%	0%	21%	0%

(1) Bundled package consists of payroll, POP, COBRA and HRAnswerLink.

Review the HRConnect Contract, Employer-administered FSA Contract, HealthConnect CobraToday Plan Application, HealthConnect Flex System Plan Application and TASC POP Agreement.

Have a HealthConnect Systems representative contact you about HRConnect subscription.

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