

## Solstice Marketplace Benefits Administrator Portal Guide



Private Exchange | Enrollment Platform | Benefits Management Software

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## Introduction

Open enrollment is finally finished but your job as a benefits administrator is not over. Things are constantly changing in your organization and in the lives of your employees. Maybe a new hire joins your company or another employee leaves to pursue another other opportunity. When it comes to benefits, you have tasks you must perform all year long.

Luckily the Solstice Marketplace is an easy-to-use platform that was built with you in mind. We know you have lots to do and little time to get it done. So, we built the Solstice Marketplace to make your life easier.

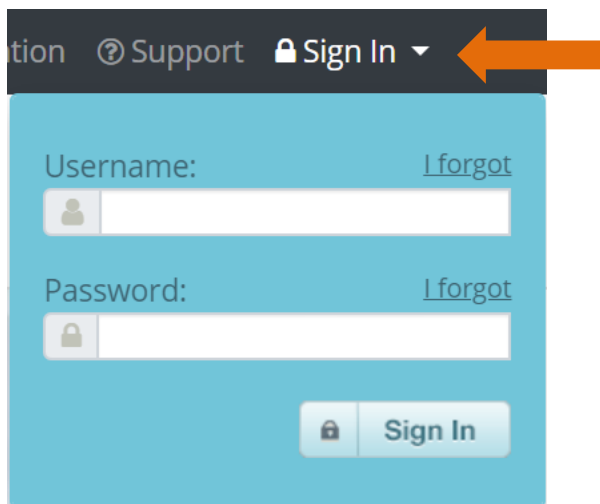
This benefits administrator portal guide contains easy to use instructions that will help you quickly perform the tasks you do most often long after open enrollment has ended.

Once you have selected Solstice as your benefits carrier, you will automatically be registered with the Solstice Marketplace benefits portal. You will receive a **Welcome Email** from us with some important information, including a username and temporary password. Once you have this, navigate to the benefits portal website and sign in to activate your account.

### Activate Your Account

1. Enter the following URL address into your browser: <https://www.solsticemarketplace.com>. It will direct you to your portal.

2. Click **Sign In** and fill in the credentials provided in your Welcome Email:



Once you log in, you will be taken to the **Benefits Administrator** page.

3. Confirm the pre-populated information we have for you and fill in any missing information. Completing this page is the first step to updating your profile and activating your account.

To update your profile, follow these steps:

a. In the top third of this page, confirm the contact information we have for you.

b. Navigate to the **Choose your account access** section of this page, which allows you to change your username and create a password that will be meaningful to you. *Please note that this is your only opportunity to adjust this.*

**Benefits Administrator**

Administrator Agreement Employer Profile Activate Account

**1. Benefits Administrator**

**Instructions**

The primary benefits administrator profile form is pre-populated with the information that you have submitted.

- Check the information we have for you and update it if necessary.
- You have the option to change your username so that it makes sense to you and you can remember.
- Protect the privacy of your information by changing the password we have sent you. Choose a password that you can remember and keep it in a safe place.
- Type the answer of three security questions. We will ask these questions to confirm your identity in case you forget your log-in information.

**2. User Agreement**

**3. Employer Profile**

**4. Activate Account**

**Benefits Administrator Profile**

First things first.. you need to create your benefits administrator profile.

*\* Required Fields*

First name: \* Last Name: \*

Email: \*

Retype Email: \*

Phone: \* Ext.:

Administrator/Coordinator role(s): **Billing Coordinator**

**Choose your account access:**

\*Username: [input] **Check Availability**

Old password: \* Password

Enter your new password: \* Password

Retype new password: \* Password

Please note:

- Your **Old password** is the one you received in your Welcome Email.
- For your **New Password**, be sure to keep the following password requirements in mind.

**Password must contain:**

1. At least six characters
2. At least one uppercase letter
3. At least one lowercase letter
4. At least one number
5. At least one symbol from the following list:  
@#S%^&+=!

- Use the instructions located on the left panel of your screen to help as you set up your profile.

**1. Benefits Administrator**

**? Instructions**

The primary benefits administrator profile form is pre-populated with the information that you have submitted.

- Check the information we have for you and update it if necessary.
- You have the option to change your username so that it makes sense to you and you can remember.
- Protect the privacy of your information by changing the password we have sent you. Choose a password that you can remember and keep it in a safe place.
- Type the answer of three security questions. We will ask these questions to confirm your identity in case you forget your log-in information.

- c. Further down the same page, type in answers to the three security questions you selected. We will ask for the answers to these questions to confirm your identity in case you forget your log-in information.

**Security questions:**

Security Question 1: \*

Security Answer 1: \*

Security Question 2: \*

Security Answer 2: \*

Security Question 3: \*

Security Answer 3: \*

Security Answer 3: \*

Answer

Cancel

Submit >

4. Click **Submit** to get to Step 2, the **User Agreement** portion of the process.



## User Agreement

This User Agreement outlines the terms of our service. Please be sure to read the entire agreement. Finally, indicate that you accept it by checking the box at the bottom of the agreement.

Print

### Benefits Administrator User Agreement

#### 22. Mediation

In the event that any dispute, claim, or controversy of any kind or nature relating to this Agreement arises between the Parties, the Parties agree to meet and make a good faith effort to resolve the dispute. If the dispute is not resolved within thirty (30) days after the Parties first met to discuss it, and either Party wishes to pursue the dispute further, that Party shall refer the dispute to non-binding mediation under the Commercial Mediation Rules of the American Arbitration Association ("AAA"). In no event may the mediation be initiated more than one year after the date one Party first gave written notice of the dispute to the other Party. A single mediator engaged in the practice of health care and/or insurance law shall conduct the mediation under the then current rules of the AAA. The mediation shall be held in Broward County, Florida unless the Parties consent in writing to use another location. If the Parties are not able to resolve their differences through the mediation process within thirty (30) days of referring the matter to the AAA, either Party shall be free to pursue all legal and equitable remedies otherwise available to it.

#### 23. Waiver

Failure to insist upon strict compliance with any of the terms, covenants, or conditions of this Agreement shall not waive that term, covenant, or condition, or any other term, covenant, or condition of this Agreement. Any waiver or relinquishment of any right or power hereunder at any one or more times shall not waive or relinquish that right or power at any other time. The remedies set forth in this Agreement are cumulative and are in addition to any other remedies allowed by Law. Resort to one form of remedy shall not constitute a waiver of alternate remedies.

I accept the user agreement

Cancel & Sign Out

Continue >

5. Use the scroll right scroll bar to move down the page and review the **User Agreement**.

6. At the end, click the checkbox, indicating that you understand and accept the **User Agreement**.

7. Then, select **Continue** to advance to the next step.

- Once you click **Continue**, you will advance directly to the **Activate Account** page.
- And don't worry, if you log out, the system will automatically pick up where you left off when you log back in.

8. Review the information provided and then click on **Enter Account**.

**Activate Account**

Administrator Agreement Employer Profile **Activate Account**

- ✓ Benefits Administrator
- ✓ User Agreement
- ✓ Employer Profile
- 4. Activate Account**

**Instructions**

Congrats! You've finished activating your Benefits Administrator account!

You can start entering group info now by clicking "Enter Account," or come back and do it later by logging back in. It's up to you!

**Bravo! You're DONE!**

Ready to manage the health insurance benefits for your groups? Now you can:

- Set up open enrollment, including your employer contributions
- Manage your employees' benefits accounts
- Pay all of your groups' health insurance plans in one bill with Single Source Billing
- And much more!

Sign Out

**Enter Account >**

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You will be taken to your benefits portal homepage (or dashboard), where all the magic begins!

## Benefits Administration Dashboard

Here's your **Benefits Administration Dashboard**. From this page, you can see the benefits status of all your employees and perform a variety of tasks, including adding employees, viewing and paying your bills, and much more!

We are here for you

**1-855-SOLMRKT**

### Group Benefits Administration for Marketplace Group.

**Need to do:**

- Bill is past due

**My bill:** Past Due

Current bill: \$6,575.00

Total due: \$6,545.00

Due date: 11/19/2014

Pay bill

[View bill](#)

**Group Benefits (as of 10/27/2015)**

	ENROLLED	NEW EMPLOYEES	DECLINED	INACTIVE	
13	7	4	0	2	<ul style="list-style-type: none"> <li> <a href="#" style="color: white; text-decoration: none;">find employee</a></li> <li> <a href="#" style="color: white; text-decoration: none;">add employee</a></li> <li> <a href="#" style="color: white; text-decoration: none;">update benefits</a></li> <li> <a href="#" style="color: white; text-decoration: none;">term employee</a></li> </ul>
EMPLOYEES	<a href="#" style="color: white; text-decoration: none;">active accounts</a>	<a href="#" style="color: white; text-decoration: none;">enrollment status</a>	<a href="#" style="color: white; text-decoration: none;">declined coverage</a>	<a href="#" style="color: white; text-decoration: none;">inactive accounts</a>	

	MEDICAL	DENTAL	VISION	LIFE	
3	1	2	0	0	<ul style="list-style-type: none"> <li> <a href="#" style="color: white; text-decoration: none;">benefits summary</a></li> <li> <a href="#" style="color: white; text-decoration: none;">open enrollment</a></li> <li> <a href="#" style="color: white; text-decoration: none;">carriers' forms</a></li> <li> <a href="#" style="color: white; text-decoration: none;">contributions</a></li> </ul>
ACTIVE PLANS	<a href="#" style="color: white; text-decoration: none;">medical plans</a>	<a href="#" style="color: white; text-decoration: none;">dental plans</a>	<a href="#" style="color: white; text-decoration: none;">vision plans</a>	<a href="#" style="color: white; text-decoration: none;">life plans</a>	

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**What to find:**

[An employee record](#)

[Current bill](#)

**What to do:**

[Pay my bill](#)

[Add an employee](#)

**Need Help:**

**Broker:**

[Blurred]

**Billing Administrator:**

*(none assigned)*

So, let's get started! *Please note that some details are blurred to protect confidential information.*



## Manually Enroll Employees for Benefits

The process of enrolling an employee for benefits has three main steps. They include:

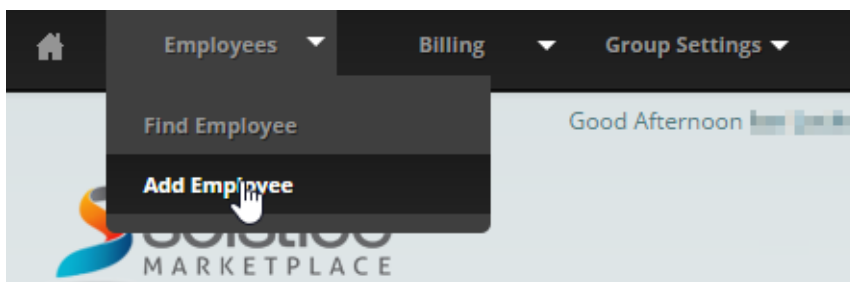
- I. Adding the employee to the Marketplace
- II. Entering the Enrollment Dates
- III. Adding Employee Dependents
- IV. Adding Benefits

Let's start by adding an employee.

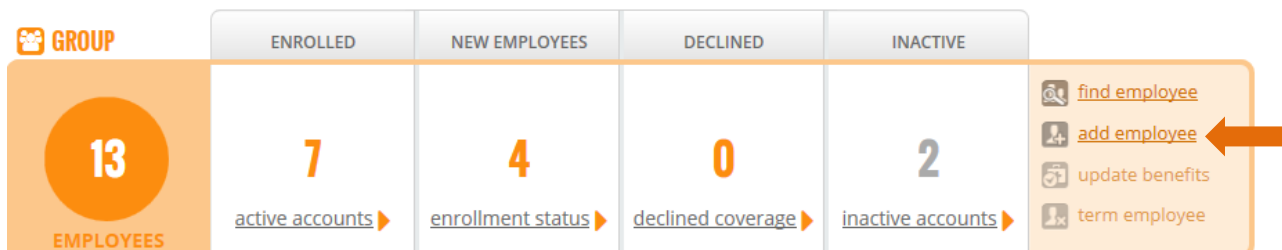
### I. Adding an Employee

1. Double check to see if the employee you are trying to add is already in the system. This will help you avoid creating duplicates.
2. Once you confirm they are not already in the system, you can add them in two ways.

**Option A:** Hover over **Employees** located on the top navigation panel; then, select **Add Employee**



**Option B:** Navigate to the group panel on the page and select the **add employee** quick link.



3. Enter the employee's information into the form provided.  
(Don't worry – if you make a mistake, the portal will let you know)

Some things to keep in mind:

a. While the **email and phone number** are not required, *please fill in this information* as it makes it easy to contact the employee and follow up on any questions.

b. Under **Work Information**, click the drop-down arrow beside **Select Group Structure** if your group has multiple divisions or structures and select the specific structure to which your employee is assigned.

[Dashboard](#) > [Find Group](#) > Add Employee



## Add Employee

Add a new employee to your group by completing the information below. It's that simple!

### Personal Information:

\* Required Fields

First Name: *	Middle Name:	Last Name: *
<input type="text" value="First Name"/>	<input type="text" value="Middle"/>	<input type="text" value="Last Name"/>
Date of Birth: *	Gender: *	
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Select Gender"/>	
<input type="checkbox"/> Uses Tobacco		

SSN: *	
<input type="text" value="999-99-9999"/>	
Email:	Retype Email:
<input type="text" value="Email"/>	<input type="text" value="Retype Email"/>
Phone:	
<input type="text" value="(999) 999-9999"/>	

### Home Address:

Country: *		
<input type="text" value="Select Country"/>		
Street Address Line 1: *	Street Address Line 2:	
<input type="text" value="Street Address 1"/>	<input type="text" value="Street Address 2"/>	
City: *	State: *	ZIP Code: *
<input type="text" value="City"/>	<input type="text" value="Select State"/>	<input type="text" value="99999"/>

### Work Information:

Select Group Structure: *	
<input type="text" value="Active"/>	
Member Number:	Employee Type: *
<input type="text" value=""/>	<input type="text" value="FT"/>
Date Of Hire: *	Payroll Cycle: *
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="Weekly"/>
Annual Salary: *	
\$ <input type="text" value=""/>	

### Login Information:

Username:
<input type="text" value="Username"/>

Save Profile

< Go Back

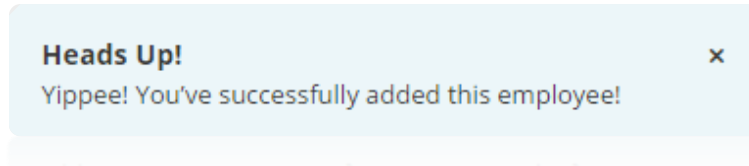
c. **VERY IMPORTANT: Never enter the employees' or their dependents' social security number (SSN) in the Member Number field.** If you have an alternate identification number for the employee or his or her dependent, you may enter this. Otherwise, always leave this cell blank.

Our system will automatically generate an alternate ID number to protect your employee's privacy.

d. There's no need to fill in the **username** as the portal will auto-populate this.

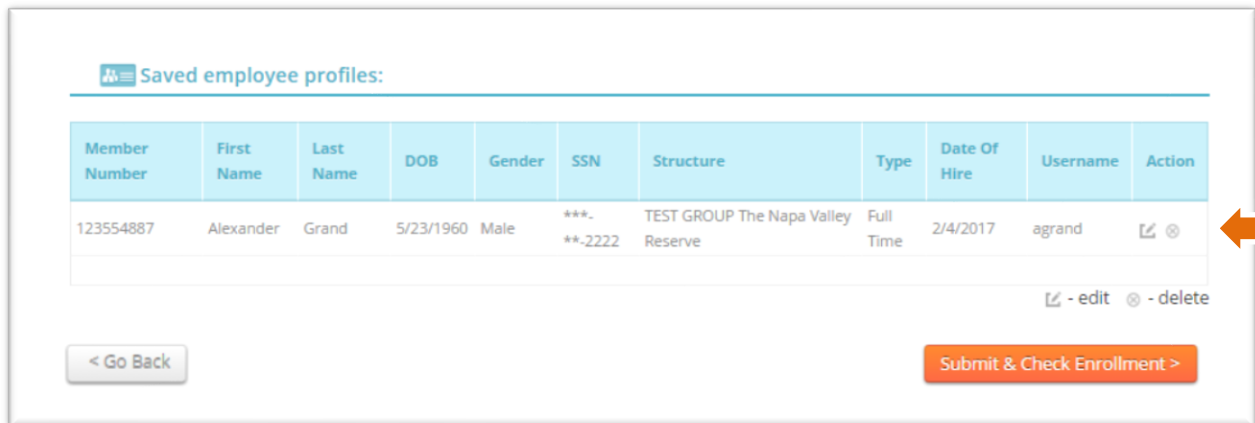
4. Once you have filled out this form, click on **Save Profile**. You will see three things:



a. **Confirmation of Success:** A note at the top of the form will confirm that you have successfully added the employee.



b. **New Form:** Want to add more employees? The system will provide another blank form so you can add additional employees. So, keep adding and selecting **Save Profile** after each entry.

c. **List of Added Employees:** For your convenience, you will see a table at the bottom of the page, listing the employees whose profiles you have saved. **Be sure to scroll all the way to the bottom to see those recently added.**

A screenshot of a web interface showing a table of saved employee profiles. The table has columns for Member Number, First Name, Last Name, DOB, Gender, SSN, Structure, Type, Date Of Hire, Username, and Action. An orange arrow points to the edit and delete icons in the Action column for the first row.

Member Number	First Name	Last Name	DOB	Gender	SSN	Structure	Type	Date Of Hire	Username	Action
123554887	Alexander	Grand	5/23/1960	Male	***-**-2222	TEST GROUP The Napa Valley Reserve	Full Time	2/4/2017	agrand	 

< Go Back Submit & Check Enrollment >

If you made a mistake on this page, this is a good time to make changes. Simply click on the edit or delete icons located under the **Action** column, and to the right of the employee's name.



5. Once everything is OK, go ahead and select **Submit & Check Enrollment**. **This is an important step in the process so don't forget.** The program will then take you to the **Enrollment Status for Employee Benefits** page.

## II. Entering Enrollment Dates

Scroll down the page to the section titled **Employees Pending Enrollment**. Here, you will find a list of employees that have been added to your account but have not been enrolled in coverage.

Employee search (Name, DOB, Last four SSN, Member Number)

We are here for you  
1-855-SOLMRKT

Dashboard > Enrollment Status for Employees

**Enrollment Status for Employees of [Company Name]**

Want to check the enrollment status of your employees? Review enrollment forms? Update enrollment dates? You can do it all here!

Enrollment Status Summary

Group Benefits Effective Period: 4/1/2016 - 12/31/2999

	New Employee		
	Per Status	Total	
Employees Pending Enrollment:		2	<a href="#">Check Enrollment Dates</a>
Employees in Enrollment:		0	<a href="#">Check Enrollment Status</a>
Not Started:	0		
In Progress:	0		
Submitted:	0		
Decline Benefits:	0		
Employees After Enrollment:		50	<a href="#">Verify Submission</a>
Verified Submission:	0		
Unverified Submission:	0		
<b>Total:</b>		<b>52</b>	

**Employees Pending Enrollment**

Select employee(s) and update the enrollment dates and/or effective benefits period.

Enrollment Period:  Start  End

Coverage Period:

**DO NOT enter dates for Enrollment Period or Coverage Period. You will do this on the next screen.**

	First Name	Last Name	Date of Birth	Date of Hire	Enrollment Start Date	Enrollment End Date	Coverage Effective Date	Coverage End Date	Action
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	

6. Click into the check box that's to the left of the name of the employee you are attempting to enroll.

7. Then, click on the **Enroll Employee** icon ( ) to the right of the name.

You will get a dialogue box below that will give you the option to *add dependents* or *simply select* benefits.

⚠ **You are about to manually enroll an employee** ×

<b>Employee Profile</b> Name <input type="text"/> DOB <input type="text"/> Group Structure <b>ABC Group Test</b>	<b>Effective Period</b> Start <input type="text" value="mm/dd/yyyy"/> <input type="text" value="📅"/> End <input type="text" value="mm/dd/yyyy"/> <input type="text" value="📅"/>
<b>Do you want to add dependents for this employee?</b> <input type="radio"/> Yes, I want to add dependents. <input type="radio"/> No, I just want to select benefits.	<b>Dependents</b> <i>none</i>

**Before we go any further, here are a few things to keep in mind about the Effective Period information:**

- a. **Start Date:** Your enrollment period **Start** date must be the first day of a given month.
- b. **End Date:** Use 12/31/2999 as the **End** date. This ensures that the employee's benefits will perpetually be in effect.
- c. **Invoice Tip:** It's important to know that invoices are generated a month in advance. Changes you make *after* the invoice has been generated *will not be reflected until the following month*. For example, if February's invoice is prepared and generated by January 11th, changes made after this date will not be reflected on the February invoice; instead, they will show up as retroactivity on the March invoice.

If you have questions concerning this, be sure to reach out to your billing and eligibility coordinator. They're happy to help!

## Adding Employee Dependents

If your employee has dependents, you will want to add them before you select benefits. So, let's walk through the steps of adding dependents.

**You are about to manually enroll an employee**

**Employee Profile**

Name Luke Vador  
DOB 3/9/1962  
Group Structure ABC Group Test

**Effective Period**

Start mm/dd/yyyy  
End mm/dd/yyyy

Do you want to add dependents for this employee?

Yes, I want to add dependents.  
 No, I just want to select benefits.

**Dependents**

none

Cancel Continue

8. Click the checkbox **Yes, I want to add dependents**.

9. Enter the **Effective Period Start** and **End** dates (based on the previously stated guidelines) and click **Continue**. Clicking **Continue** will take you to the dependent profile form, seen on page 15.

**Add Dependent's Profile**

Add a new dependent by completing the information below.

First Name: \* MI: \*  
First Name M

Last Name: \*  
Last Name

Date of Birth: \*  
mm/dd/yyyy

Gender: \*  
 Male  Female

Social Security Number: \*  
999-99-9999

Relationship: \*  
Select Relationship

**Home Address:**

Use employee's address

Street Address Line 1: \* Street Address Line 2: \*  
Street Address 1 Street Address 2

City: \* State: \* ZIP Code: \*  
City Select State 99999

Save Profile Cancel

10. Fill in the requested information into the dependent profile form. And to save time, if the employee and the dependent share the same address, simply click the checkbox to the left of **Use employee's address** (below) and the system will populate the subscriber's address for that dependent.

#### Home Address:

Use employee's address

Street Address Line 1: \*

Street Address Line 2:

Street Address 1

Street Address 2

City: \*

State: \*

ZIP Code: \*

City

Select State

99999

Save Profile

Cancel

11. Once you have completed the required information, select **Save Profile**. On the following **Dependents** page, you will see the dependent(s) you added.

Dashboard > Enrollment Status for Employees > Dependent List



Employee Marcus Garvey

Benefits Status: Inactive

Member ID: [REDACTED]

Email: [REDACTED]

Employee Summary

Personal Profile

Dependents

Benefits

Update Dependent

Add Dependent

Dependents

Benefits Enrollment Settings:

The benefits enrollment and the effective dates are applied per group rules. You can change the dates by using the link below.

[Change date\(s\)](#)

Benefits Effective Date:  
1/1/2017

Enrollment Due Date:  
1/25/2017

[REDACTED]

Member ID: [REDACTED]

Relationship: Child

What would you like to do next?

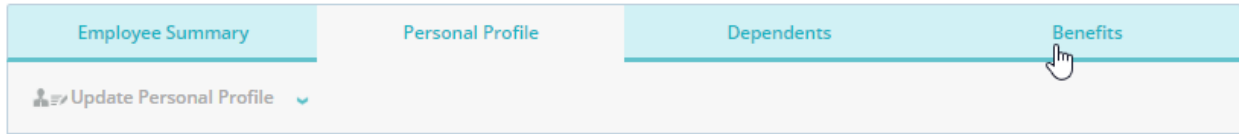
- Manually enroll in benefits
- Go to employee personal profile

From here, you can add another dependent by clicking **Add Dependent** (located on the upper gray ribbon). The portal will provide you with a new form. Fill out the requested information as you did before and **Save Profile** each time.

## Adding Benefits

It's time to assign **Benefits** to the employee and his or her dependents.

There are two ways to do this. You may select **Benefits** from the upper ribbon on this page.



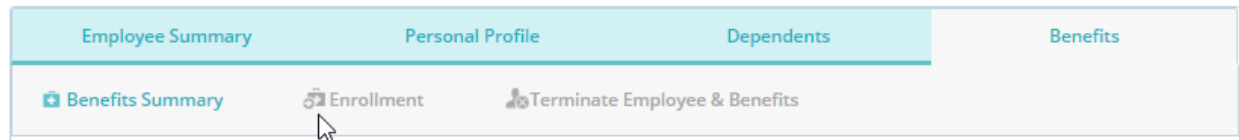
**OR**

Use the quick links, seen below, to **Manually enroll in benefits**.

What would you like to do next?

- Manually enroll in benefits
- Go to employee personal profile

1. Click on **Benefits**.
2. Then, click on **Enrollment**



This will take you to the **Benefits Summary** page, where you can select benefits for your employee and his or her family.

3. To see the plan types available under each product (in this case **Dental**) click on the drop-down arrow, right before **Dental**. It will expand and show your employees' dental plan options.



**Dental**

Covered:

Current	New	Name	Relationship	Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	Subscriber	[REDACTED]
<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	Son	[REDACTED]

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$0.00	\$0.00

Decline dental coverage.

[Edit Choices](#)

4. Then select the **Edit Choices** button; this will unlock the section.

**Dental**

Covered:

Current	New	Name	Relationship	Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	Subscriber	[REDACTED]
<input type="checkbox"/>	<input type="checkbox"/>	[REDACTED]	Son	[REDACTED]

Update Plan:


Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$0.00	\$0.00

Decline dental coverage.

[Edit Choices](#)

5. Select either the employee or the dependent for whom you are selecting benefits.

*Note: When you select a dependent, the employee will automatically be selected as well.*

 **Dental** ✕

Covered:

Current	New	Name	Relationship	Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	[Redacted]	Subscriber	[Redacted]
<input type="checkbox"/>	<input type="checkbox"/>	[Redacted]	Son	[Redacted]

**Calculate Premium**

6. Click **Calculate Premium** to display the cost for each dental benefit product available to your employees. It's *only after you select **Calculate Premium*** will you be able to select the specific dental plan you want to assign to your employee.

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$4.62	\$4.62

Decline dental coverage.

7. Go ahead and click the checkbox beside the specific dental (or vision) plan you want to assign to your employee and his or her family.

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$4.62	\$4.62

Decline dental coverage.

**Save Choice**

8. Then, click **Save Choice**.

Just before you click **Submit**, look to the right and review the **Employee Cost Calculator**; it will display the complete benefit cost, as well as the amount that will be deducted from the employee's paycheck per the selected pay period.

Employee Cost		
	\$4.62	
Employee Cost (per pay period)		
Benefits	Current	New
Dental: DHMO	N/A	\$4.62
<b>Benefit cost</b>	<b>\$0.00</b>	<b>\$4.62</b>
<b>Paycheck deductions</b>	<b>\$0.00</b>	<b>\$4.62</b>

9. Finally, click **Submit** to complete the process of assigning benefits. *Don't forget this last step.*

### New Enrollment Forms:

 - not completed  completed



Enrollment updates last submitted on 3/6/2017.

And that's it. You've just added an employee, his or her dependents and assigned benefits to the family.

Do you have some other tasks to do? Use the quick links to quickly perform these tasks.

### What would you like to do next?

- Print ID card
- Manually enroll an employee
- Add a new employee
- Go to employee personal profile
- Go to Dashboard

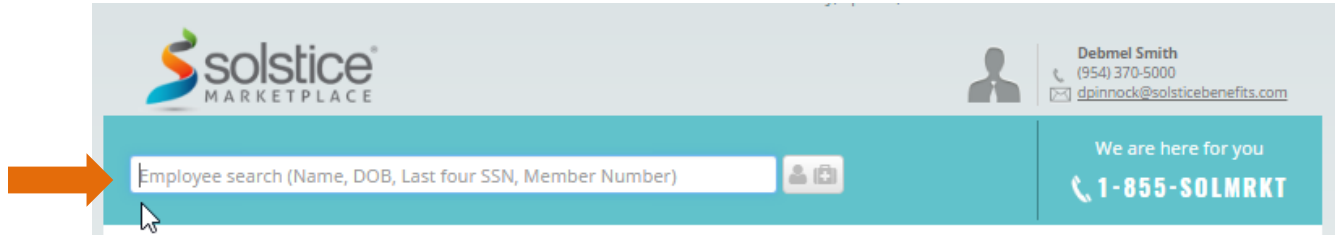
**\*Quick Note:** If your group has vision with our partner, Davis Vision, Inc. (Davis), employees will receive their IDs from them; therefore, the Print ID card link in the portal will not generate ID cards for your employees.

## Add Dependents After Employee Effective Date

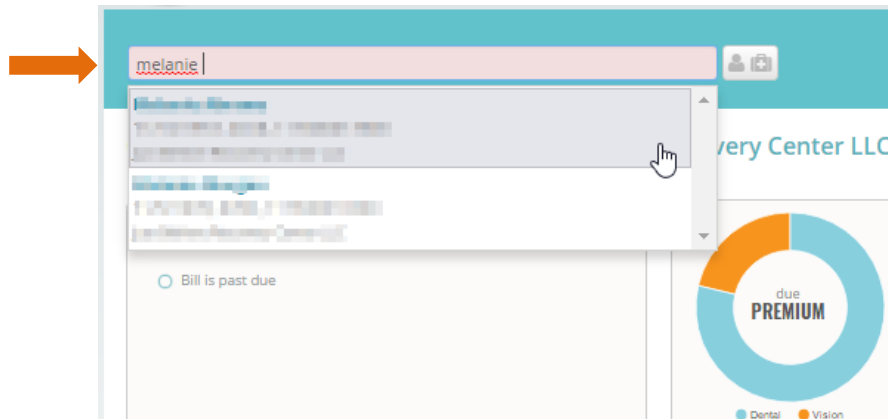
Undoubtedly, you are going to have employees go through open enrollment, become effective on the plan, and then need to add a spouse or children to the plan. Here's how to add dependents after the employee's effective date.


1. Your first task is to find the employee. You may do so in two ways:

a. Enter the employee's name or other search options into the search panel found at the top of the page.



- Once you type in the name, the system will generate all employees with that name. Simply move your cursor over the correct employee and select him or her.



- Then click on the Benefit Summary icon (  ) to the right of the search panel, and the system will take you directly to the Benefit Summary page.

Employee Summary      Personal Profile      Dependents      **Benefits**

Benefits Summary      Enrollment      Terminate Employee & Benefits

### Employee Benefits Summary

**total PREMIUM**

● Dental ● Vision

#### Benefits Account Summary

Benefits Effective Date: **1/1/2017**

Benefits Expiration Date: **12/31/2999**

Employee Cost per Pay Period: **\$31.02**

Employer Cost per Pay Period: **\$0.00**

Show cost:  per Pay period     per Month

#### Health Insurance Benefits:

Select a product to view the health plan details. The plan rates show per selected period.

✓ - selected    ✗ - decline    ? - status pending

	Employee Cost	Status
> <b>Dental</b>	24.66	✓
> <b>Vision</b>	6.36	✓
<b>Total Deductions per Pay Period:</b>		<b>\$31.02</b>

#### Update Employee Benefits

\*Reason for Update

Select Reason

\*Event Date:

#### Benefits History

Benefits history not available

#### Enrollment Forms

Enrollment Forms not available

3. Click into the **Reason for Update** box and the system will provide you with various qualifying events for adding a dependent after the initial effective date.

4. Select the reason that applies.

Add Dependent ^

\*Reason for Update

Select Reason

- Select Reason
- Marriage
- Declaration of Domestic Partner
- Birth
- Adoption
- Employee Returns From Absence
- Divorce
- Termination of Domestic Partner
- Legal Separation
- Placement For Adoption
- Dependent's Age Eligibility Change
- Dependent's Benefits Eligibility Change
- Employee Takes Absence
- Dependent's Change of Residence
- Death of Dependent
- Change of Employee Type
- Change of Employee's Work Location
- Change of Employee's Residence
- Significant Cost Increase / Decrease
- Error Correction

5. In the field for **Event Date**, enter today's date or use the pop-up calendar to select the date.

**Employee Benefits Summary**

**Benefits Account Summary**

Benefits Effective Date:	1/1/2017
Benefits Expiration Date:	12/31/2999
Employee Cost per Pay Period:	\$31.02
Employer Cost per Pay Period:	\$0.00

Show cost:  per Pay period  per Month

**Update Employee Benefits**

\*Reason for Update: Select Reason [v]

\*Event Date: MM/DD/YYYY [calendar icon] ←

Cancel Submit

6. Once you have entered the dates, click **Submit**. The system will display the information you just entered.

**Employee Benefits Summary**

**Benefits Account Summary**

Benefits Effective Date:	6/1/2016
Benefits Expiration Date:	12/31/2999
Employee Cost per Pay Period:	\$37.32
Employer Cost per Pay Period:	\$0.00

Show cost:  per Pay period  per Month

**Health Insurance Benefits:**

Select a product to view the health plan details. The plan rates show per selected period.

✓ - selected x - decline ? - status pending

**Update Employee Benefits**

Qualifying Life Event: Marriage [Edit]

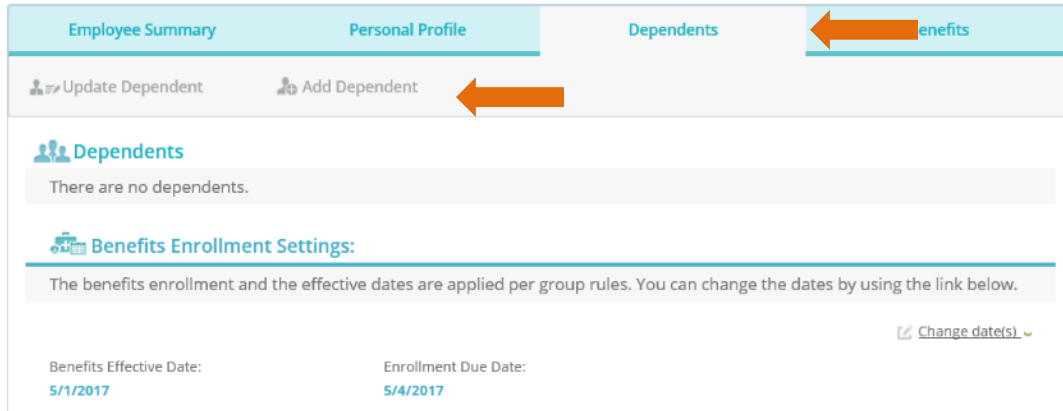
Event Date: 4/13/2017

Selected benefits update method: Group Administrator Update

Cancel All Updates

7. Then click on the **Dependents** tab

8. After that, click **Add Dependent**.



Employee Summary Personal Profile Dependents Benefits

Update Dependent Add Dependent

### Dependents

There are no dependents.

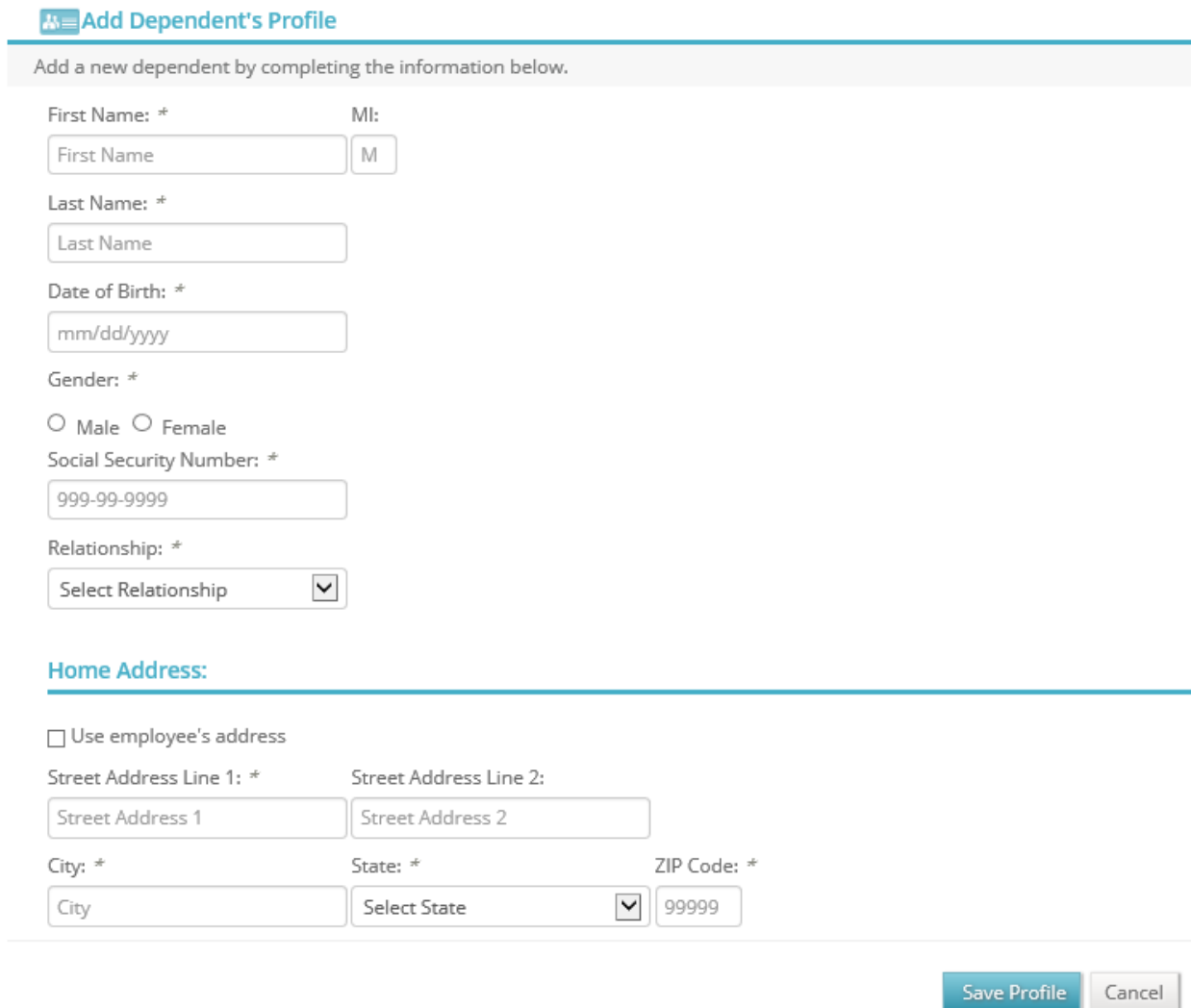
### Benefits Enrollment Settings:

The benefits enrollment and the effective dates are applied per group rules. You can change the dates by using the link below.

[Change date\(s\)](#)

Benefits Effective Date: 5/1/2017 Enrollment Due Date: 5/4/2017

9. Then from here, fill in the requested information.



### Add Dependent's Profile

Add a new dependent by completing the information below.

First Name: \* MI:

Last Name: \*

Date of Birth: \*

Gender: \*

Social Security Number: \*

Relationship: \*

### Home Address:

Use employee's address

Street Address Line 1: \* Street Address Line 2:

City: \* State: \* ZIP Code: \*

Save Profile Cancel

10. Once this is complete, **Save Profile**. The system will display all dependents.

The screenshot shows a web interface for managing dependents. At the top, there is a header 'Dependents' with a person icon. Below it is a section titled 'Benefits Enrollment Settings:' with a gear icon. A message states: 'The benefits enrollment and the effective dates are applied per group rules. You can change the dates by using the link below.' To the right of this message is a link 'Change date(s)' with a dropdown arrow. Below the message, there are two fields: 'Benefits Effective Date: 5/1/2017' and 'Enrollment Due Date: 5/13/2017'. A table lists five dependents, each with a dropdown arrow, a name, a Member ID, and a Relationship. The relationships are Spouse, Child, Child, Child, and Child. The name 'Jane Doe' is visible for the last dependent.

Dependent Name	Member ID	Relationship
[Redacted]	[Redacted]	Spouse
[Redacted]	1 [Redacted]	Child
[Redacted]	[Redacted]	Child
[Redacted]	[Redacted]	Child
Jane Doe	[Redacted]	Child

Right below this screen, you will see two quick links.

#### What would you like to do next?

- Manually enroll in benefits
- Go to employee personal profile

11. Select the **Manually enroll in benefits** quick link to add benefits to the newly added dependent(s).

Some things to keep in mind:

- The benefit effective date must be listed as the **first of a month**.
- The enrollment due date should be listed as the same date the event is updated in the system (today's date).



12. Once you get to the **Benefits Enrollment** page, click on the option to **Change dates**.

**Benefits Enrollment Settings**

You can change the dates by using the link below. Enrollment must be completed within 30 days from the date of qualifying life event.

[Change date\(s\)](#) ▾

Benefits Effective Date: **5/1/2017**      Enrollment Due Date: **5/13/2017**

**Update Benefits**

Select an update option and apply benefits changes accordingly. After visiting all benefit sections submit your new selections to load the enrollment forms

**Current Period (06/01/2016 - 05/31/2017)**

✓ - selected   ✗ - decline   ? - undecided

**Health Plans:**

**Dental** Status ✓

Covered:		Name	Relationship	Date of Birth
Current	New			
✓	<input type="checkbox"/>	[Redacted]	Subscriber	[Redacted]
✓	<input type="checkbox"/>	[Redacted]	Spouse	[Redacted]
✓	<input type="checkbox"/>	[Redacted]	Daughter	[Redacted]
✓	<input type="checkbox"/>	[Redacted]	Daughter	[Redacted]
✓	<input type="checkbox"/>	[Redacted]	Son	[Redacted]
	<input type="checkbox"/>	[Redacted]	Daughter	[Redacted]

**Employee Cost**

**\$0.00**

**Employee Cost (per pay period)**

Benefits	Current	New
Dental: PPO	\$37.32	N/A
<b>Benefit cost</b>	<b>\$37.32</b>	<b>\$0.00</b>
<b>Paycheck deductions</b>	<b>\$37.32</b>	<b>\$0.00</b>

**Enrollment Forms**

Enrollment Forms not available

You will see the following note.

You can change the dates by using the link below. Enrollment must be completed within 30 days from the date of qualifying life event.

[Change date\(s\)](#)

By changing the benefits effective date, any benefit selections you have made related to this event will be discarded and you will need to select new benefits again.

Benefits Effective Date:  ⚠️      Enrollment Due Date:

[Update Benefits](#)


13. Update the **Benefits Effective Date**. Do not change the **Enrollment Due Dates**.

14. Then, select **Save Dates**.

You can change the dates by using the link below. Enrollment must be completed within 30 days from the date of qualifying life event.

[✎ Change date\(s\) ▾](#)

Benefits Effective Date: **5/1/2017**      Enrollment Due Date: **5/13/2017**

 **Update Benefits**

15. You will see the option **Edit Choices** on this page. Select it, and it will allow you to select the dependents to whom you want to assign benefits (seen on page 27).

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	11029 - Solstice Dental PPO	PPO	\$39.93	\$39.93

Decline dental coverage.

[✎ Edit Choices](#)



[Submit](#)

16. Click **Calculate Premium**.

**Current Period (06/01/2016 - 05/31/2017)**  
 ✓ - selected ✗ - decline ? - undecided

**Health Plans:**

**Dental** Status

**Covered:**

Current	New	Name	Relationship	Date of Birth
✓	<input checked="" type="checkbox"/>	[Redacted]	Subscriber	[Redacted]
✓	<input checked="" type="checkbox"/>	[Redacted]	Spouse	[Redacted]
✓	<input checked="" type="checkbox"/>	[Redacted]	Daughter	[Redacted]
✓	<input checked="" type="checkbox"/>	[Redacted]	Daughter	[Redacted]
✓	<input checked="" type="checkbox"/>	[Redacted]	Son	[Redacted]
	<input checked="" type="checkbox"/>	[Redacted]	Daughter	[Redacted]

**Calculate Premium** ←

**Update Plan:**

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
✓	<input type="checkbox"/>	Solstice Benefits, Inc.	11029 - Solstice Dental PPO	PPO	\$13.57	\$13.57

Decline dental coverage.

**Save Choice**

**Employee Cost**  
\$0.00

**Employee Cost (per pay period)**

Benefits	Current	New
Dental: PPO	\$37.32	N/A
<b>Benefit cost</b>	<b>\$37.32</b>	<b>\$0.00</b>
<b>Paycheck deductions</b>	<b>\$37.32</b>	<b>\$0.00</b>

**Enrollment Forms**

Enrollment Forms not available

17. Click the checkbox in front of the appropriate plan.

**Update Plan:**

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
✓	<input type="checkbox"/>	Solstice Benefits, Inc.	11029 - Solstice Dental PPO	PPO	\$13.57	\$13.57

Decline dental coverage.

**Save Choice** ←

18. Then **Save Choice**.

The **Employee Cost** calculator directly to the right, will display the new dollar amount the subscriber will be billed per pay period.

**Employee Cost**  
**\$0.00**

**Employee Cost  
(per pay period)**

Benefits	Current	New
Dental: PPO	\$37.32	N/A
<b>Benefit cost</b>	<b>\$37.32</b>	<b>\$0.00</b>
<b>Paycheck deductions</b>	<b>\$37.32</b>	<b>\$0.00</b>

**Enrollment Forms**

Enrollment Forms not available

19. Once you are OK with the update, then click **Submit**

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	11029 - Solstice Dental PPO	PPO	\$39.93	\$39.93

Decline dental coverage.

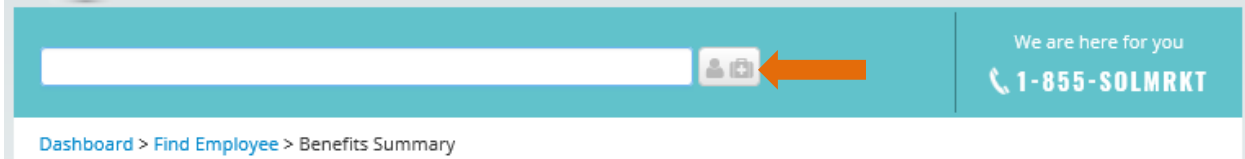
[Edit Choices](#)

[Submit](#) ←

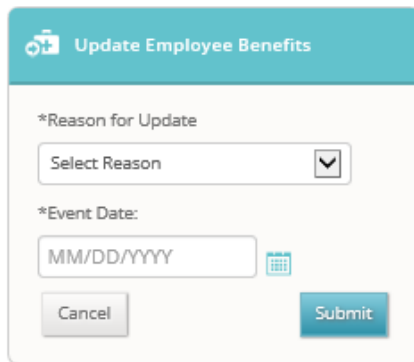
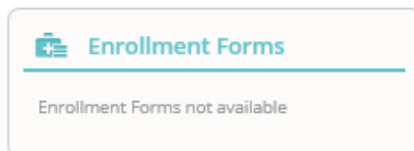
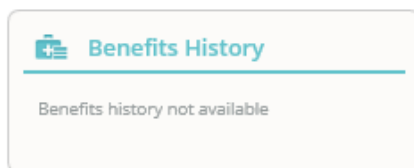
## Print an ID Card

With your benefits portal, you can easily print an ID card for an employee. It might even be one of the easiest things you do all day. Here are some quick instructions:

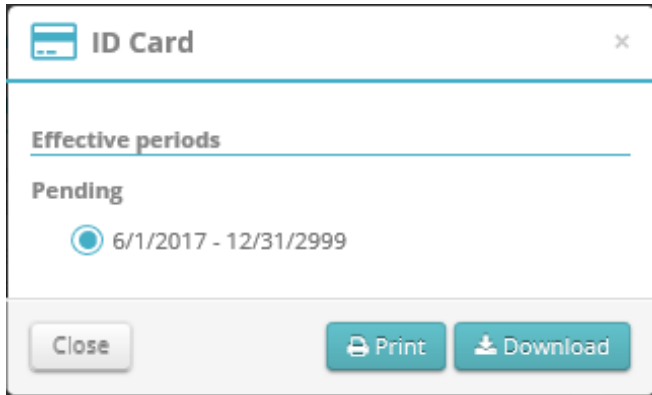
1. First, find the employee. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.



2. Once you have entered his or her name, click on the briefcase icon and this will take you to the **Benefits Summary** page. When you get there, look on the right column and you will see the **ID Card Quick Links** option.

A screenshot of the "Update Employee Benefits" form. The form has a teal header with a briefcase icon and the text "Update Employee Benefits". Below the header, there are two sections: "\*Reason for Update" with a dropdown menu labeled "Select Reason" and a downward arrow, and "\*Event Date:" with a text input field containing "MM/DD/YYYY" and a calendar icon. At the bottom of the form are two buttons: "Cancel" and "Submit".

3. Click the quick link option, **ID Card**. From here, you can simply print or download the ID and email it to the employee.

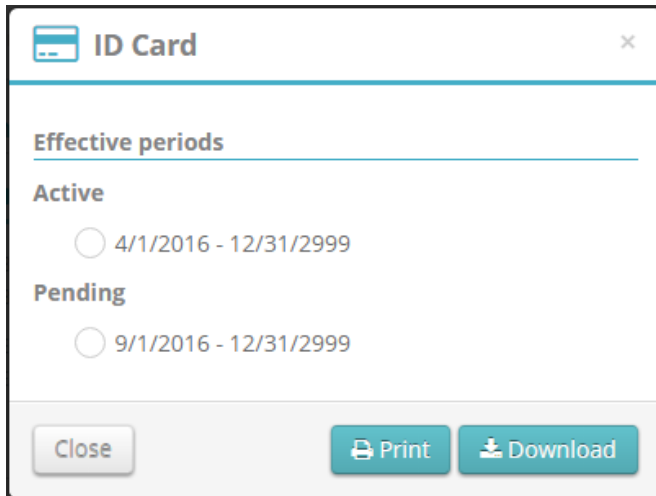


The screenshot shows a window titled "ID Card" with a close button in the top right corner. Below the title bar, there is a section titled "Effective periods" with a horizontal line underneath. Under this section, the word "Pending" is displayed. Below "Pending", there is a radio button that is selected, followed by the date range "6/1/2017 - 12/31/2999". At the bottom of the window, there are three buttons: "Close", "Print", and "Download".



There may be times if your group is about to go through a renewal, that you will see two **Effective period** options: active and pending. This means, you can select to have an ID card that reflects the employee's current benefits information (**Active**) or one that reflects the new benefits information (**Pending**).

4. Select the desired **Effective periods**



The screenshot shows a window titled "ID Card" with a close button in the top right corner. Below the title bar, there is a section titled "Effective periods" with a horizontal line underneath. Under this section, the word "Active" is displayed. Below "Active", there is a radio button that is not selected, followed by the date range "4/1/2016 - 12/31/2999". Below "Active", the word "Pending" is displayed. Below "Pending", there is a radio button that is not selected, followed by the date range "9/1/2016 - 12/31/2999". At the bottom of the window, there are three buttons: "Close", "Print", and "Download".

**Some things to keep in mind:**

- Once you download the ID card, you can email it to your employee.
- Don't forget that employees can print an additional ID card by going directly to their Solstice portal ([www. mySolstice.net](http://www.mySolstice.net) portal).
- **Reminder:** If your group has vision with our partner, Davis Vision, Inc. (Davis), they will send your employees their ID cards; therefore, your benefits portal will not be able to generate ID cards for employees with this plan.

## Terminate Employee Benefits

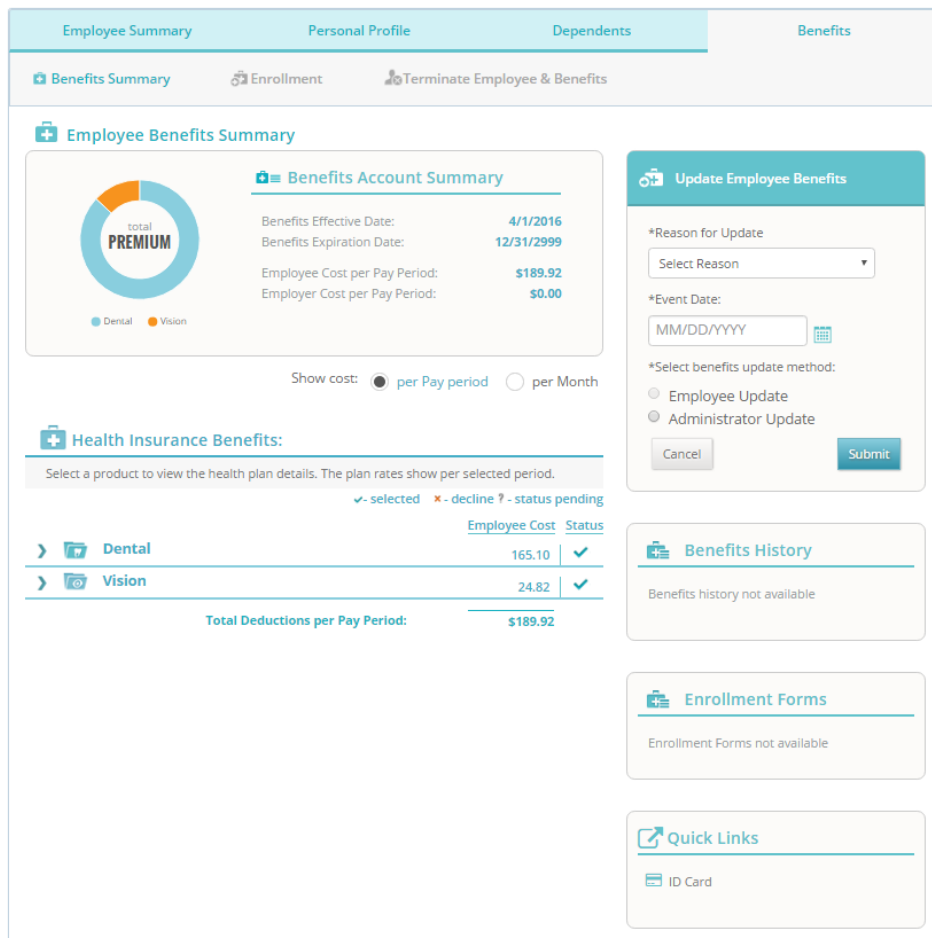
Here's how:

1. First, find the employee. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

Once you have entered his or her name, click on the briefcase icon and this will take you to the **Benefits Summary** page.



2. To terminate benefits navigate to **Update Employee Benefits** and enter the reason for terminating benefits under **Reason for Update**.



A screenshot of the "Employee Benefits Summary" page. The page has a teal header with tabs for "Employee Summary", "Personal Profile", "Dependents", and "Benefits". Below the header, there are three sub-tabs: "Benefits Summary", "Enrollment", and "Terminate Employee & Benefits". The main content area is divided into several sections:

- Employee Benefits Summary:** Includes a donut chart for "total PREMIUM" (Dental and Vision) and a "Benefits Account Summary" table.
- Health Insurance Benefits:** A table listing "Dental" and "Vision" with their respective costs and statuses.
- Update Employee Benefits:** A teal button with a briefcase icon, highlighted with an orange arrow. It opens a form with fields for "Reason for Update", "Event Date", and "Select benefits update method".
- Benefits History:** A section stating "Benefits history not available".
- Enrollment Forms:** A section stating "Enrollment Forms not available".
- Quick Links:** A section with a link for "ID Card".

Benefits Effective Date:	4/1/2016
Benefits Expiration Date:	12/31/2999
Employee Cost per Pay Period:	\$189.92
Employer Cost per Pay Period:	\$0.00

	Employee Cost	Status
Dental	165.10	✓
Vision	24.82	✓
<b>Total Deductions per Pay Period:</b>	<b>\$189.92</b>	

5. In **Event Date**, enter *today's date* and select **Submit**.

6. Click **Enrollment**

7. Then, click **Change dates**.

Employee Summary   Personal Profile   Dependents

Benefits

Benefits Summary   **Enrollment**   Terminate Employee & Benefits

**Employee: Update Benefits**

**Benefits Enrollment Settings**

You can change the dates by using the link below. Enrollment must be completed within 30 days from the date of qualifying life event.

[Change date\(s\)](#)

Benefits Effective Date: 4/1/2017   Enrollment Due Date: 4/27/2017

**Update Benefits**

Select an update option and apply benefits changes accordingly. After visiting all benefit sections submit your new selections to load the enrollment forms

**Current Period (03/01/2017 - 12/31/2999)**

✓ - selected   ✗ - decline   ? - undecided

**Health Plans:**

**Dental**   Status: ✓

**Covered:**

Current	New	Name	Relationship	Date of Birth
✓	<input type="checkbox"/>			

**Update Plan:**

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
✓	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$6.57	\$6.57
<input type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	4447 - Stellar Advantage PPO	PPO	\$0.00	\$0.00

Decline dental coverage.

[Edit Choices](#)

**Employee Cost**

**\$0.00**

**Employee Cost (per pay period)**

Benefits	Current	New
Dental: DHMO	\$6.57	N/A
<b>Benefit cost</b>	<b>\$6.57</b>	<b>\$0.00</b>
<b>Paycheck deductions</b>	<b>\$6.57</b>	<b>\$0.00</b>

**Enrollment Forms**

Enrollment Forms not available



8. Click into the **Benefits Effective Date** and use the pop-up calendar to change the **Benefits Effective Date** to the first of the following month, which represents the date you want coverage to cease. In the example shown below, selecting 3/1/2017 will end coverage on 2/28/2017.

By changing the benefits effective date, any benefit selections you have made related to this event will be discarded and you will need to select new benefits again.

Benefits Effective Date: 3/1/2017

Enrollment Due Date: 3/28/2017

Save dates

Employee Cost \$0.00

9. Then, change the **Enrollment Due Date** to today's date.

By changing the benefits effective date, any benefit selections you have made related to this event will be discarded and you will need to select new benefits again.

Benefits Effective Date: 3/1/2017

Enrollment Due Date: 3/28/2017

Cancel

Update Benefits

Select an update option and apply benefits changes a

Current Period (03/01/2017 - 12/31/29)

Save dates

Employee Cost \$0.00

10. After that, select **Save Dates**.

11. Scroll down and select **Edit Choices**.

**Current Period (03/01/2017 - 12/31/2999)**

✓ - selected   ✗ - decline   ? - undecided

**Health Plans:**

▼ **Dental** Status

Covered:

Current	New	Name	Relationship	Date of Birth
✓	<input type="checkbox"/>	Tessa Testing	Subscriber	05/01/1951

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
✓	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$6.57	\$6.57
	<input type="checkbox"/>	Solstice Benefits, Inc.	4447 - Stellar Advantage PPO	PPO	\$0.00	\$0.00

Decline dental coverage.

[Edit Choices](#)

12. Click into the **Decline coverage** checkbox and then **Save Choice**.

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
✓	<input type="checkbox"/>	Solstice Benefits, Inc.	13039 - S700B	DHMO	\$6.57	\$6.57
	<input type="checkbox"/>	Solstice Benefits, Inc.	4447 - Stellar Advantage PPO	PPO	\$0.00	\$0.00

Decline dental coverage.

[Save Choice](#)

> **Vision** ✗

**New Enrollment Forms:**

📄 - not completed   📄 completed

[Submit](#)

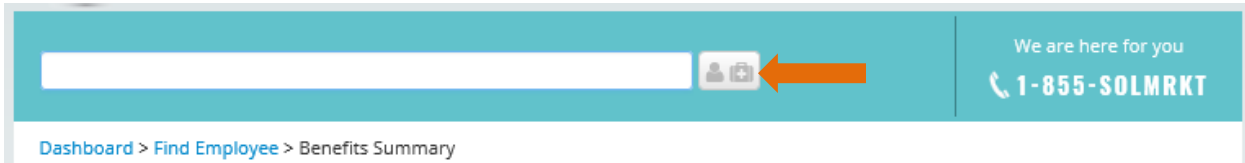
13. Then finally, hit **Submit** to complete the process of removing an employee's benefits. You are done!

## Remove Dependent Benefits Due to Qualifying Event

Another task that you perform throughout the year is removing the benefits of a dependent who is no longer eligible for coverage. To do so, follow these steps:

First, find the employee of the dependent. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

Once you have entered his or her name, click on the briefcase icon and this will take you to the **Benefits Summary** page.



This will take you to the **Benefits Summary** page. On the main panel, you will see the employee's benefits account summary and on the lower half, you can see which benefits the member has.

The screenshot displays the "Employee Benefits Summary" page. The page has a header with tabs for "Employee Summary", "Personal Profile", "Dependents", and "Benefits". Below the header, there are three main sections:

- Employee Benefits Summary:** Includes a donut chart for "total PREMIUM" with categories for Medical, Dental, and Vision. Below the chart is a "Benefits Account Summary" table with the following data:

Benefits Effective Date:	11/1/2016
Benefits Expiration Date:	12/31/2999
Employee Cost per Pay Period:	\$99.23
Employer Cost per Pay Period:	\$0.00

Below this table is a "Show cost:" section with radio buttons for "per Pay period" (selected) and "per Month".
- Update Employee Benefits:** A form with a dropdown for "\*Reason for Update" (set to "Select Reason"), a date field for "\*Event Date" (set to "MM/DD/YYYY"), and "Cancel" and "Submit" buttons.
- Health Insurance Benefits:** A table with a legend: "✓ - selected", "✗ - decline", "? - status pending". The table has columns for "Employee Cost" and "Status".

	Employee Cost	Status
> Medical	92.31	✓
> Dental	4.62	✓
> Vision	2.31	✓
<b>Total Deductions per Pay Period:</b>	<b>\$99.23</b>	

An orange arrow points to the "Dental" row in this table.

On the right side of the page, there are two more sections: "Benefits History" (stating "Benefits history not available") and "Enrollment Forms" (stating "Enrollment Forms not available").

4. Click on the arrow right before **Dental**, and it will expand and show the dependents covered under the dental plan.

Dental		13.85	✓
TYPE:	PLAN NAME:	EFFECTIVE FROM:	EFFECTIVE UNTIL:
DHMO	S700A	5/1/2017	12/31/2999
Covered	Covered	Billing Details (per Pay Period)	
	From/Until		
Victoria Barona	Subscriber	5/1/2017	Carrier: Solstice Benefits, Inc.
		12/31/2999	Plan Premium: \$13.85
Veronica Lopez	Daughter	5/1/2017	Employer Pays: \$0.00
		12/31/2999	Employee Pays: \$13.85
Victor Lopez	Son	5/1/2017	
		12/31/2999	

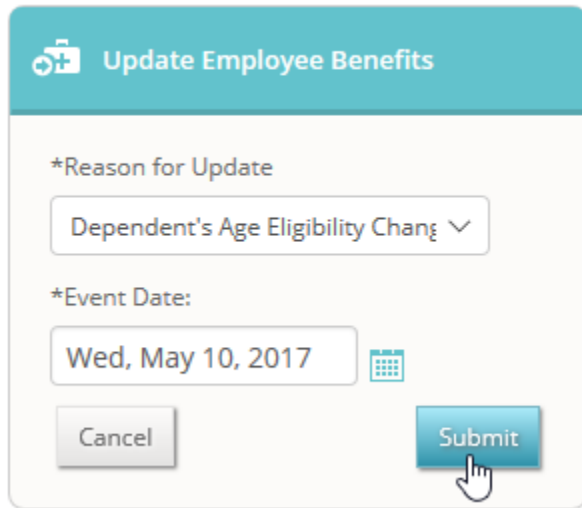
5. Then to the right, under **Update Employee Benefits**, click into the cell beneath **Reason for Update** and you will be provided with various qualifying events. Select the appropriate event. In this example, we are removing benefits for a dependent child that is no longer eligible, because he or she just turned age 26.

**Update Employee Benefits**

\*Reason for Update

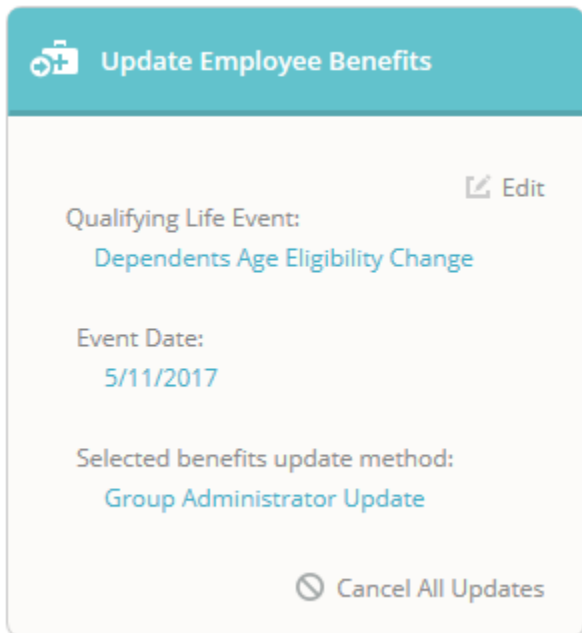
- Select Reason
- Marriage
- Declaration of Domestic Partner
- Birth
- Adoption
- Employee Returns From Absence
- Divorce
- Termination of Domestic Partner
- Legal Separation
- Placement For Adoption
- Dependent's Age Eligibility Change
- Dependent's Benefits Eligibility Change
- Employee Takes Absence
- Dependent's Change of Residence
- Death of Dependent
- Change of Employee Type
- Change of Employee's Work Location
- Change of Employee's Residence
- Significant Cost Increase / Decrease
- Error Correction

6. Enter today's date into the **Event Date** cell and click **Submit**.



The screenshot shows a teal header with a gear icon and the text "Update Employee Benefits". Below the header, there are two main sections. The first section is labeled "\*Reason for Update" and contains a dropdown menu with the selected option "Dependent's Age Eligibility Change" and a downward arrow. The second section is labeled "\*Event Date:" and contains a text input field with "Wed, May 10, 2017" and a calendar icon to its right. At the bottom of the form, there are two buttons: a grey "Cancel" button on the left and a blue "Submit" button on the right. A mouse cursor is pointing at the "Submit" button.

7. The **Update Employee Benefits** tab will show that you successfully created a pending event. If you realize you made a mistake, you can still **Edit** or **Cancel All Updates** by double clicking on the appropriate option.



The screenshot shows the "Update Employee Benefits" tab with a teal header containing a gear icon and the text "Update Employee Benefits". The main content area is light grey and contains the following information: "Qualifying Life Event:" followed by "Dependents Age Eligibility Change" in blue text, with an "Edit" link (pencil icon) to the right. Below this is "Event Date:" followed by "5/11/2017" in blue text. Further down is "Selected benefits update method:" followed by "Group Administrator Update" in blue text. At the bottom of the content area, there is a "Cancel All Updates" link with a circular icon containing a diagonal slash.

8. To proceed with the change, click on **Enrollment**.

Employee Summary   Personal Profile   Dependents   **Benefits**

Benefits Summary   **Enrollment**   Terminate Employee & Benefits

### Employee Benefits Summary

total **PREMIUM**

● Medical ● Dental ● Vision

#### Benefits Account Summary

Benefits Effective Date:	<b>11/1/2016</b>
Benefits Expiration Date:	<b>12/31/2999</b>
Employee Cost per Pay Period:	<b>\$113.08</b>
Employer Cost per Pay Period:	<b>\$0.00</b>

#### Update Employee Benefits

Qualifying Life Event: [Dependents Age Eligibility Change](#) [Edit](#)

Event Date: **5/11/2017**

From here, you will be able to update benefits. You will see that the **Benefits Effective Date** is the first of the following month, the default. If you want to change this, you may do so by selecting the **Change dates** link to the right.

### Benefits Enrollment Settings

You can change the dates by using the link below. Enrollment must be completed within 30 days from the date of qualifying life event.

Benefits Effective Date:	Enrollment Due Date:
<b>6/1/2017</b>	<b>6/10/2017</b>

[Change date\(s\)](#)

#### Update Benefits

9. Once you have the dates locked in, navigate down the page and click on the drop-down arrow by the appropriate benefit – **Dental** in this case.

**Dental**

Covered:

Current	New	Name	Relationship	Date of Birth
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rosana Ferrera	Subscriber	10/20/1983
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yennifer Iglesias	Daughter	01/01/2000
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rosana Junior Iglesias	Son	01/01/2001

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	S700A	DHMO	\$13.85	\$13.85

Decline dental coverage.

[Edit Choices](#)

10. Then click on **Edit Choices**.

11. Select all the members that **will remain** on the plan, by clicking on the appropriate checkboxes.

12. Afterwards, click on the **Calculate Premium** button.

**Dental**

Covered:

Current	New	Name	Relationship	Date of Birth
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rosana Ferrera	Subscriber	10/20/1983
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yennifer Iglesias	Daughter	01/01/2000
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rosana Junior Iglesias	Son	01/01/2001

[Calculate Premium](#)

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	S700A	DHMO	\$13.85	\$13.85

Decline dental coverage.

[Save Choice](#)

13. Right below that, select the dental plan you want the selected members to have, and then **Save Choice**.

Update Plan:

Current	New	Carrier	Plan Name	Type	EE Cost	Premium
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Solstice Benefits, Inc.	S700A	DHMO	\$13.85	\$13.85

Decline dental coverage.

[Save Choice](#)

14. Finally, **Submit** your changes.

New Enrollment Forms:

[- not completed](#) [completed](#)

[Submit](#)




## Update Employee Profile

Things change all the time. Addresses. Email addresses. Phone numbers. Your benefits portal allows you to quickly make these changes for your employees and get to the other things you have to do. To update an employee's profile, do the following:

1. Click on the home icon to go back to the **Benefits Administration** Dashboard.



First, find the employee of the dependent. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

There are two action icons (   ) to the right of each employee's record. Select this icon (  ) to update the employee's personal profile. This will take you to the **Personal Profile** Page.





Employee Summary    Personal Profile    Dependents    Benefits

Update Personal Profile

Personal Profile

Personal Information: \* Required Fields

First Name: \*    Middle Name:    Last Name: \*

Date of Birth: \*    Gender: \*  
Female

4. Right below the column titled, **Employee Summary**, you will see **Update Personal Profile**. Click on the drop-down arrow to view your options.

Employee Summary    Personal Profile    Dependents    Benefits

Update Personal Profile

Personal Profile

Personal Information: \* Required Fields

5. You will see two options. Please select **Update profile only**.

Employee Summary    Personal Profile    Dependents    Benefits

Update Personal Profile

Update profile only  
Update profile and benefits

Personal Information: \* Required Fields

Once you've selected this option, the page will become fill-able, allowing you to edit the employee's information, as seen on page 42.

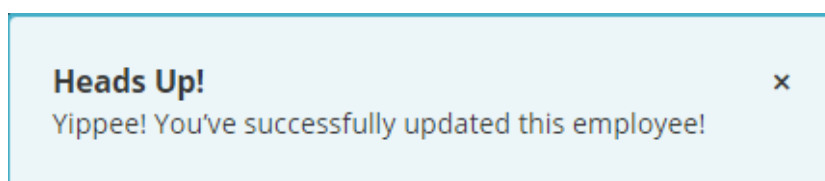
**Personal Information:** \* Required Fields

---

First Name: \*  Middle Name:  Last Name: \*

Date of Birth: \*  Gender: \*

6. Make the necessary changes and select **Save Profile**. You will know that your update was successful because you will see the following:






## Update an Employee's Dependent Profile

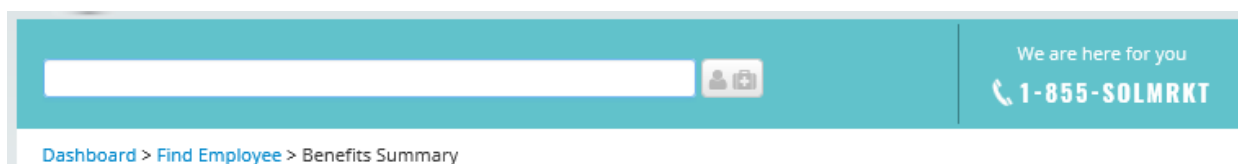
What if a dependent's information changes? How do you update that? Quick and easy. Follow these steps:

1. Click on the home icon to go back to the **Benefits Administration** Dashboard.

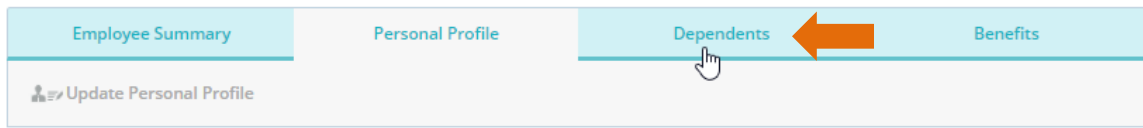


First, find the employee of the dependent. You can simply type in the employee's name into the top search panel, enter his or her DOB, or member number.

There are two action icons (   ) to the right of each employee's record. Select this icon (  ) to update the employee's personal profile. This will take you to the **Personal Profile** Page.



3. Once you get to the **Employee Profile** page, click on **Dependent**.

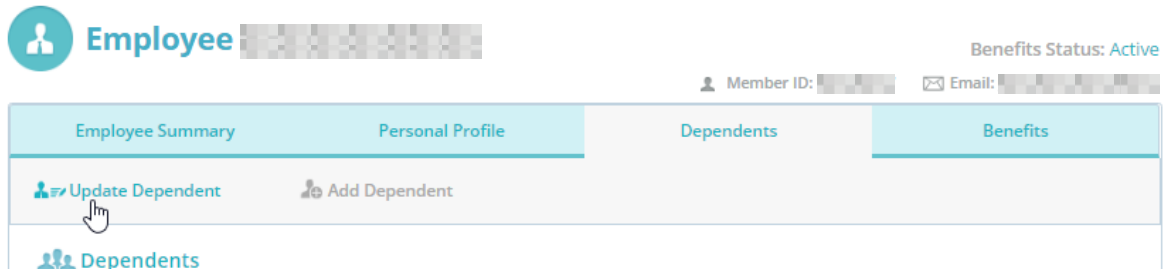


Personal Profile

Right below that ribbon, you will see the option to **Update** or **Add** more dependents.

4. Click on **Update Dependent**.

Dashboard > Find Employee > Dependent List



5. Go ahead and make the changes to the dependent's profile in the form that's provided.

**Update dependent profile only.**

**Benefits Enrollment Settings:**

The benefits enrollment and the effective dates are applied per group rules. You can change the dates by using the link below.

[Change date\(s\)](#)

Benefits Effective Date: 4/1/2017      Enrollment Due Date: 4/6/2017

Member ID:      Relationship: Child

The dependent's information is displayed below. Use the menu links to update or remove the dependent.

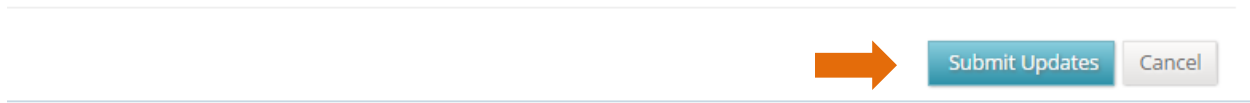
**Personal Information:** \* Required Fields

First Name: \*      MI:

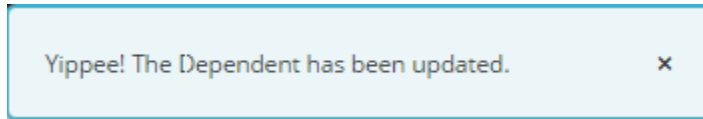
Last Name: \*

Date of Birth: \*

6. Then, click **Submit Updates**.



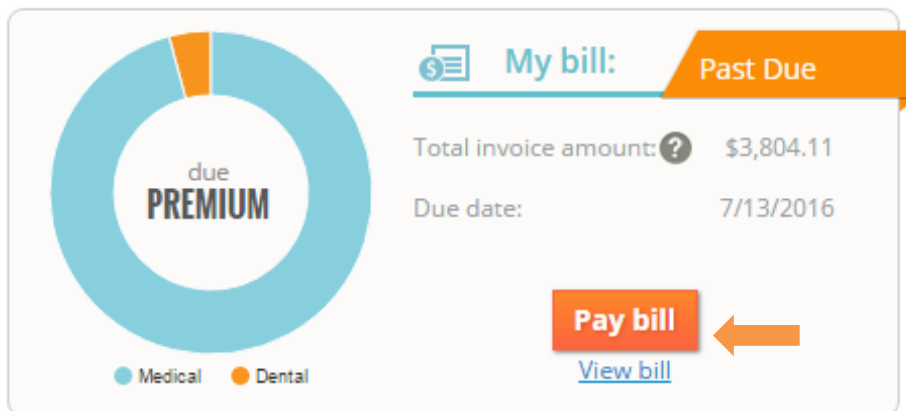
You'll see this confirmation, letting you know the dependent's information was updated.



## Pay Bill

Paying your bill has never been easier!

1. From your Dashboard, click on **Pay Bill**.



This will take you to the **Billing Overview** page where you can see your **Current Balance** (left) and **Invoice Summary** (right) as seen on page 45.

# Billing Overview

Group: ABC Group Test

Sel  
ABC Group Test

Current Balance:	
	Past Due
Current Invoice Total	\$2,892.00
Recent Adjustments	\$7,650.00
Recent Payments	\$0.00
Recent Refunds	\$0.00
<b>Current balance due:</b>	<b>\$10,542.00</b>

Invoice Summary:	
Previous Invoice Total	
Payments Received	
Current Invoice Charges	
Service Fees	
Current Invoice Adjustments	
<b>Invoice Total:</b>	

## Make a Payment


Please select whether you would like to pay full amount or another amount from the radio buttons below. If you choose to pay another amount you would like to pay in the text field(s) provided. Once finished, please click **Continue**.

Pay full amount (\$10,542.00)  
 Pay other amount

Paying the full amount ensures that you start each month fresh, and only pay the balance incurred for that month. Paying a portion will result in the balance owed rolling over and being added to the next month's balance. Therefore, it's best to pay the full amount of each invoice.

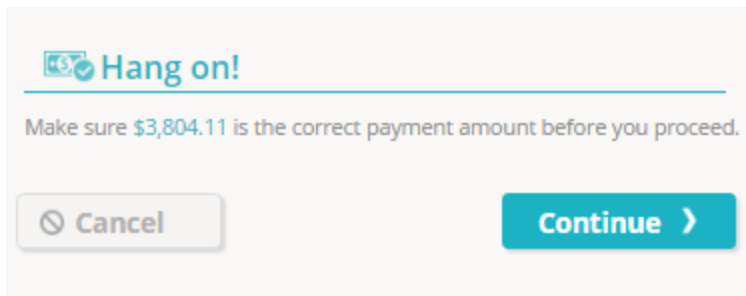
## Make a Payment

Please select whether you would like to pay full amount or another amount from the radio buttons below. If you choose to pay another amount please enter the amount you would like to pay in the text field(s) provided. Once finished, please click **Continue**.

  Pay full amount (\$3,804.11)  
 Pay other amount

2. For the purposes of this guide, let's select to pay the full amount. An alert will appear, asking you to check and make sure that the payment amount is correct.

3. If you are sure, click **Continue** again.



On the new page, you will have three tasks, which will show on the top half of the page:

- Select Payment Source
- Verify & Submit Payment
- Payment Confirmation



Let's review each step:

A. **Select Payment Source:** Click the checkbox beside the option, **Add a bank account**, and then enter the requested information into the fields of the available form.

A form titled "Payment source" with the subtitle "Select one of your accounts on file or add a new source of payment." The form has a light gray background. At the top left is a blue icon of a credit card. Below the title is a horizontal line. The main content area is divided into two sections. The first section is titled "Deduct from bank account:" and shows a large blue "\$631.92" amount. Below this are two radio buttons: one for "Deduct from bank account" (which is currently selected) and one for "Add a bank account". The second section is titled "Account Information:" and contains several input fields: "Account Holder Name\*" (with a sub-label "Account Holder Name"), "Routing number\*" (with a sub-label "Routing Number"), "Checking account number\*" (with a sub-label "Account Number"), "Account Type\*" (with radio buttons for "Individual" and "Company"), "Account nickname (optional):" (with a sub-label "Account Nickname"), and a checked checkbox for "Private Account". At the bottom of the form are two buttons: a gray "Go back" button with a left-pointing arrow and a blue "Continue" button with a right-pointing arrow.

Note: To ensure that you are always on time with your payments, once you have entered your bank information, you may contact your eligibility and billing coordinator and they can enroll you in autopay. This convenient feature allows you to make recurring, automatic monthly payments, without having to log into your account, or remember to send a check.

Click in the checkbox before **Private Account** to ensure that the bank account information you entered is visible only to you. Leave this unchecked if it you would like for it to also be visible to the other members of your benefits staff.

**Account Information:**  
*\* Required Fields*

Account Holder Name*: <input type="text" value="Account Holder Name"/>	Account Type*: <input type="radio"/> Individual <input type="radio"/> Company
Routing number*: <input type="text" value="Routing Number"/>	Account nickname (optional): <input type="text" value="Account Nickname"/>
Checking account number*: <input type="text" value="Account Number"/>	<input type="checkbox"/> Private Account

5. **Verify & Submit Payment:** Now that you've entered your payment information, your benefits portal will display it, as shown below. Review and verify the payment information you entered.

**Verify Payment**  
Almost done! Review and verify your payment information:

<b>Payment:</b>	<b>Pay with:</b>
Payment amount: \$3,804.11	Credit/debit card: Test(4242)
Group: TEST GROUP	Expiration date: 1/2020
Date of payment: February 06, 2017	Name on card: [Redacted]

6. If it's correct, then, review the **Terms and Conditions** and click the checkbox, which indicates that you've read, understood and agree to the terms and conditions. Clicking the checkbox also means you are authorizing the payment. And that's it. You're finished!

 [Print terms and conditions](#)

The undersigned, a duly authorized and acting representative of the Group, authorizes Solstice Benefits, Inc. (Solstice) or its assigns to make electronic debit entries from the above account at the above named financial institution for Service Fees and/or payments that Solstice shall remit to insurers on Group's behalf pursuant to the Group Billing Agreement made between Group and Solstice. Solstice agrees to notify Group upon its discovery of any errors resulting from transactions under this Authorization. Group agrees to notify Solstice and its assigns immediately of any changes that may affect these instructions or Solstice's ability to rely upon them.

Unless otherwise stated in the Group Billing Agreement, this Authorization may be cancelled upon written notification in such a manner as to afford Solstice and its assigns and the above-named bank a reasonable opportunity to act on it. Any such cancellation shall be effective only with respect to entries initiated after notification to Solstice and its assigns.

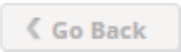
In authorizing the above agreement, Group indemnifies Solstice and its assigns of all losses, costs, damages, or expenses incurred by Group in connection with errors in deposits, credit or debit entry errors caused by persons who are not employees of Solstice and its assigns.

If Solstice does not receive the Premium Payments on or before the date(s) specified in the Group Billing Agreement, whether due to insufficient funds or for other reasons, Premium Payments may be late to Insurers, and Solstice shall bear no responsibility for Group's delinquency. Group is responsible for any fees incurred because of insufficient funds in Group's account.

I have read and understand the above Terms and Conditions, and I authorize the above charge.

By clicking "Submit Payment" you authorize the one-time payment of \$1,082.00 from your credit card account ending in ...4242.

The payment will be dated on 2/6/2017. The withdrawal from your account will generally occur within two business days of the payment date. The exact timing depends on your bank's processing schedule.

 < Go Back



 ✓ Submit payment




7. Once this is done, then go ahead and **Submit Payment**.





8. **Payment Confirmation:** Now you're at Payment Confirmation, the last portion of the **Pay Bill** process.

After you click to **Submit Payment**, you will see confirmation that your payment was scheduled (below), along with an alpha-numeric payment confirmation number, and the option to print your confirmation. Additionally, an email confirmation will be sent to the email address that's listed on the account.



  **Thank you! Your payment has been scheduled.**  
Payment confirmation number: ch\_19kjd6ljMtklijuwEzDg66R 

 [Print confirmation](#)

 <b>Payment Scheduled:</b>	 <b>Paid with:</b>
Authorized amount: \$1,082.00	Credit/debit card: Mr. Mc(4242)
Group: ABC Group Test	Name on card: Brian McKnight
Payment date: February 06, 2017	Expiration date: 1/2022

Confirmation email will be sent to the email on file: ilocke2@solsticebenefits.com

The payment will be posted to your account on February 06, 2017. The withdrawal from your account will generally occur within two business days of the payment date. The exact timing depends on your bank's processing schedule.

#### What would you like to do next?

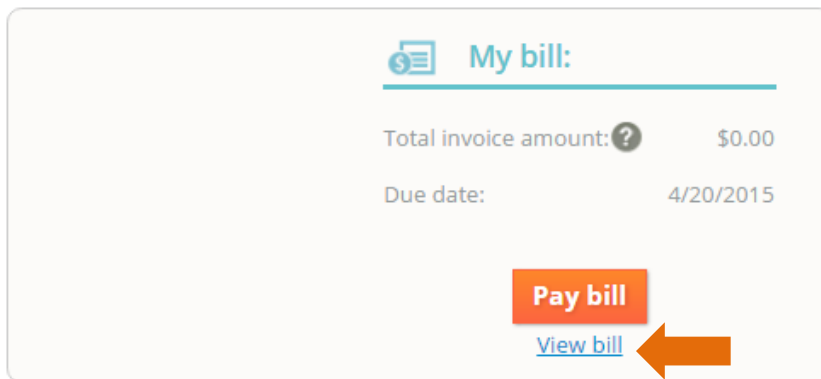
- View your payment history
- Add or delete payment accounts
- View your Invoices
- Go to the account dashboard

## Access and Filter Invoice Report

Based on feedback we received from our clients, we also provide our monthly invoice in a downloadable Excel file called an Invoice Detail Report. Here are some guidelines on how to access and filter the report so you capture exactly what you are looking for:

### How to Access the Invoice Detail Report

1. From your dashboard, click on **View Bill**.



2. Under the section titled **Current Invoice** under **Invoice Detail Report**, click *download* to view and analyze your monthly invoice in Excel.



Select Group Structure:

ABC Group Test

### Current Invoice:

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
04/01/2017 - 04/30/2017	M1436560	\$2,892.00	view	download	Pay now

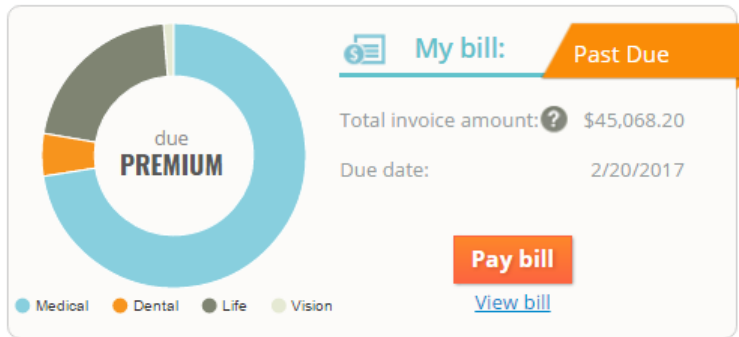
### Past Invoices:

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
3/1/2017 - 3/31/2017	M1406967	\$2,530.00	view	download	
2/1/2017 - 2/28/2017	M1380039	\$2,168.00	view	download	
1/1/2017 - 1/31/2017	M1352852	\$1,806.00	view	download	
12/1/2016 - 12/31/2016	M1351219	\$1,444.00	view	download	

## View invoices by group division

If your company is set-up to bill-by-division, here are a few steps to access invoices for specific divisions of your organization.

1. From your dashboard, select **View bill**.



2. This will take you immediately to the **Invoice History** page, where current and past invoices associated with your Master Group will be displayed.

**Invoice History**  
View current and past invoices

**Current Invoice:**

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
09/01/2019 - 09/30/2019	[REDACTED]	\$6,958.14	view   download all	download	Pay now

**Past Invoices:**

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
8/1/2019 - 8/31/2019	[REDACTED]	\$3,473.89	view   download all	download	
No invoices to display					

Select Group Structure:

[REDACTED]

3. Click on the box right below the section titled, **Select Group Structure**; this will provide you with a drop-down menu of all the divisions associated with your group.
4. Click on the appropriate division; the system will show you the **invoice period, invoice number, amount** owed and allow you to see the invoice for that specific division.

**Current Invoice:**

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
03/01/2017 - 03/31/2017	[REDACTED]	\$1,187.59	view		Pay now

- You also have the option of downloading all the division invoices as a batch ZIP file rather than downloading them individually. Click on the download all link and you will be prompted to save the batch file of all invoices generated for the month.



## Invoice History

View current and past invoices

Select Group Structure:

### Current Invoice:

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
09/01/2019 - 09/30/2019	[REDACTED]	\$6,958.14	view    download all	download	Pay now

- If you would prefer, download an Excel version of your invoice by clicking on the link for the Invoice Detail Report. The Excel version gives you access to more detailed information including enrolled dependents, coverage tiers and divisions.



## Invoice History

View current and past invoices

Select Group Structure:

### Current Invoice:

Invoice Period	Invoice Number	Amount	View Invoice	Invoice Detail Report	
09/01/2019 - 09/30/2019	[REDACTED]	\$6,958.14	view    download all	download	Pay now

Now that you have the tools you need to make your job simpler, go ahead and dive in!

**Have questions or concerns?** Please contact your Solstice billing and eligibility coordinator or your account manager. We're happy to help you!