OUTLINE OF GROUP BILL SYSTEM

Primary Option Menu

0.) Help
   1. Help
   2. Help Screens
   3. User Manual

1.) Group Level Transactions

GB11   Browse - agency has access to this screen

GB12   Edit - allows changes to be processed on a group level with transactions generated to all associated policies.

GB13   Add - to establish a new group plan on the Group Bill system.

GB14   Cancel - cancels the group plan and removes all policies associated, however, the records will remain on the system.

GB15   Reactivate - reactivates a group plan if it was previously cancelled with the GB14.

GB16   Merge - to merge one group plan with another group plan.

GB17   Delete - will delete a cancelled group plan off the system.

GB18   Suspense Inventory - displays all suspense items for policies associated with the group plan.

GB19   Override Administrative - can order a group billing, change modal premiums or anticipated annual premiums on Vantage policies only.

2.) Member Level Transactions

GB21   Browse - to see a policy on a group plan on an individual level.

GB22   Edit - change information for a group member.

GB23   Create - will add a new individual to a group plan.

GB24   Cancel - removes group information from a group policy.

GB25   Reactivate - reverses all of the action of the GB24.

GB26   Switch - will switch a policy from one group to another.

GB27   Delete - removes a policy from the group bill roll call only.
                 Does not do anything to the policy side.

3.) Roll Call Utility

GB31   Policy Number - will list all policies on the group plan in
                 policy number order.

GB32   Name of Insured - will list all policies on the group plan in
                 alphabetical order by insured name.

GB33   Employee Number - will list all policies on the group plan in
                 employee number order.

4.) Batch Maintenance

GB41   Pending Maintenance - shows all information that is being
                 generated to the Administrative System on a group plan after
                 a change is processed.

5.) Bulletin

GB51   Browse Message - will show information that some one has put
                 out there on group plans for everyone to view.

GB52   Add, Change or Delete - allows you to add, change or delete
                 anything on the GB51.

```
GROUP ==>              *** GROUP LEVEL BROWSE ***
                              STATUS:                    EFFECTIVE:
NAME:
ADDR:                            -- CHANGE PENDING --    --- LAST CHANGED ---
                              CODE   WHO   EFFECTIVE                WHEN    WHO
                                                         GROUP
      ZIP:                                               MEMBR
                              ELIGIBLE EMPLOYEES

--------------- POLICIES ----------------
INSUR  DISAB  VANTAGE  UNUM  OTHER  TOTAL      ---- AGENCIES INVOLVED ----
                                              FIRST  SECOND  OTHER  TOTAL

---------- BILLING ----------      ------- LOAN ------      -- CONTRIBUTIONS --
ANNIV  FREQ  DAY  LEAD  TYPE       REPAYMENT  INTEREST      EMPLOYER   EMPLOYEE

----------- LAST BILL ----------      ANNUALIZED      ------ DISABILITY ------
MONTH     PREMIUM    APPLIED DIV      COMMISSIONS     DISCOUNT  PERCENT  INDIV

NOTE:

***ENTER GROUP NUMBER***      PF3 OR PF4 TO RETURN TO MENU   0225HB5021  BJI04039213323700
```

Browse Screen will display:

- Group status and effective date
- Group name and address
- Change pending and last change information
- Billing Information
- Agencies Involved
- Policy counts by product
- Number of eligible employees
- Loan Information
- Employee and Employer contribution indicators
- Information on last bill sent
- Disability discount information
- Special note field

```
                           *** GROUP LEVEL EDIT ***
    GROUP ==>                      STATUS:                   EFFECTIVE:

    NAME:                           -- CHANGE PENDING --    --- LAST CHANGED ---
    ADDR:                          CODE  WHO  EFFECTIVE              WHEN    WHO
                                                            GROUP
                                                            MEMBR
    ZIP:                            ELIGIBLE EMPLOYEES

    ------------- POLICIES ----------------         ---- AGENCIES INVOLVED ----
    INSUR  DISAB  VANTAGE  UNUM  OTHER  TOTAL        FIRST  SECOND  OTHER  TOTAL


    --------- BILLING ----------      ------- LOAN ------       -- CONTRIBUTIONS --
    ANNIV  FREQ  DAY  LEAD  TYPE      REPAYMENT  INTEREST        EMPLOYER    EMPLOYEE


    ----------- LAST BILL ----------      ANNUALIZED      ------ DISABILITY ------
    MONTH      PREMIUM    APPLIED DIV     COMMISSIONS     DISCOUNT  PERCENT   INDIV

    NOTE:

    *ENTER GROUP NUMBER*                           0225HB5021  BJI04039213332900
                             PF3 OR PF4 TO RETURN TO MENU
```

Allows you to make a change on a group level which will
generate transactions to all policies associated with the
group plan.

The following can be changed on this screen:

- Group name and address
- Change Pending (not the date)
- Billing Information
- Agencies
- Number of eligible employees
- Loan Information
- Employee and Employer contribution indicators
- Disability discount information
- Special note field

```
                            *** GROUP LEVEL ADD ***
GROUP ==>                        STATUS:                    EFFECTIVE:

NAME:                                -- CHANGE PENDING --      --- LAST CHANGED ---
ADDR:                                CODE  WHO  EFFECTIVE              WHEN     WHO
                                                              GROUP
                                                              MEMBR
      ZIP:                            ELIGIBLE EMPLOYEES


--------------- POLICIES ----------------               ---- AGENCIES INVOLVED ----
INSUR  DISAB  VANTAGE  UNUM  OTHER  TOTAL               FIRST  SECOND  OTHER   TOTAL


---------- BILLING -----------        ------- LOAN ------      -- CONTRIBUTIONS --
ANNIV  FREQ  DAY  LEAD  TYPE          REPAYMENT  INTEREST      EMPLOYER    EMPLOYEE


----------- LAST BILL -----------       ANNUALIZED        ------ DISABILITY ------
MONTH     PREMIUM    APPLIED DIV        COMMISSIONS       DISCOUNT  PERCENT  INDIV

NOTE:

                                                     0225HB5021  BJI04039213342200
*ENTER GROUP RECORD DATA*    PF3 OR PF4 TO RETURN TO MENU
```

This screen allows you to add a new group plan to the Group Bill file. It will generate transactions to Vantage, therefore, your group will automatically be established on Vantage 1.

*** GROUP CANCEL ***

GROUP ===>

NOTE: THIS TRANSACTION CANCELS A GROUP AND ALL OF ITS ASSOCIATED
      MEMBERS FROM THE GROUP BILLING MASTER FILE. THE RECORDS
      WILL REMAIN ON THE FILE, FLAGGED AS CANCELED. TRANSACTIONS
      ARE GENERATED WHICH WILL DELETE THE GROUP BILL INFORMATION
      FROM THE INSURANCE, DISABILITY AND VANTAGE MASTER RECORDS.

                                         0225HB5021   BJIO4039213355600
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU

This screen cancels a group and all policies associated
with it from the group billing master file. Transactions
are generated which will delete the group information
from all policies associated with the group. (Insurance,
Disability and Vantage)

```
                    *** REACTIVATE A CANCELED GROUP ***

GROUP ===>              OPTION ===>

                             1 - UPDATE ONLY GROUP BILLING MASTER

                             2 - UPDATE GROUP BILLING MASTER AND
                                 GENERATE MAINTENANCE TO UPDATE
                                 ADMINISTRATIVE MASTER FILE(S)




                                        0225HB5021   BJI04039213361200
      PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

This screen will put a previously cancelled group back into an active status. There are two options for this screen. Option 1 will reactive the group plan only. Option 2 will reactive the group plan and generate transactions to add the group information back into any policies still on the group plan roll call. However, if the group was a Check-O-Matic group when cancelled, the transactions to put the members back on will have to be done manually.

```
                    ***** GROUP MERGE *****
GROUP NUMBER   "OLD" ===>                    NAME:

               "NEW" ===>
```

```
                                    0328HB5021   BJIO4089212051700
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

This screen will be used to merge one group plan with another. Transactions generated will cancel the old plan and place all policies on the new plan reflecting the new group information. (Name/Address, frequency, type & discount) If the merge included vantage policies then the new group plan must have been established at least the day before. If the new group is a Check-O-Matic group than the Check-O-Matic information will have to be changed manually as this will only change the group information.

```
                        *** GROUP DELETE ***

    GROUP ===>


        NOTE: THIS TRANSACTION DELETES A GROUP AND ALL OF ITS ASSOCIATED
              MEMBERS FROM THE GROUP BILLING MASTER FILE.  UNLIKE THE CANCEL
              TRANSACTION (WHICH FLAGS A GROUP AS INACTIVE BUT STILL ALLOWS
              YOU TO ACCESS INFORMATION ABOUT IT) DELETE LITERALLY ERASES
              ALL DATA CONCERNING THIS GROUP AND ITS POLICIES FROM THE
              MASTER FILE.  ONCE THE TRANSACTION IS EXECUTED, ALL
              INFORMATION ON THE AFFECTED GROUP WILL BE PERMANENTLY LOST.
                              USE IT WITH CARE!




                                            0225HB5021  BJI04039213374200
    PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

This screen should be used with extreme caution. Once
you have entered the screen there is no way of getting
the information back. This will allow you to delete a
previously cancelled group off the entire group master.
If the group is deleted by mistake, it must be reentered
as if it were a new group plan.

```
                      *** GROUP SUSPENSE INVENTORY ***
     GROUP ===>              NAME:

      POLICY      NAME OF INSURED              PAID TO    CODE      AMOUNT      DATE
```

```
                                                      0225HB5021   BJI04039213381800
    PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

This screen displays all of the items currently in policy suspense for any policy associated with the group plan.

GROUP LEVEL ADMINISTRATIVE OVERRIDE

CHANGE FIELDS NOT CAPTURED IN GROUP BILLING MASTER

```
GROUP ===>                FIELD ===>      NEW VALUE ===>
GROUP OVERRIDE ===>

                                1 - VTG NEXT DUE DATE (YYYYMMDD)
                                2 - VTG BILL DATE (YYYYMMDD)
POLICY ==>                      3 - VTG MODAL PREMIUM
                                4 - VTG ANTICIPATED ANNUAL PREMIUM
     NOTE: ENTER POLICY NUMBER
           TO PROCESS ONE POLICY
           AT A TIME, LEAVE OUT
           POLICY TO PROCESS BY
           GROUP.  NOTE: FIELDS
           3 AND 4 ALSO NEED A
           'Y' IN OVERRIDE FIELD
           TO PROCESS WHOLE GROUP.
```

```
                                            0225HB5021   BJI04039213384300
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

This is for Vantage policies only. This screen allows you to:
- change the billing dates for all policies.
- produce catch-up billings for all policies.
- change billing dates on an individual policy that is on the group plan.
- change the modal premium and anticipated annual premium on an individual policy that is on the group plan.

```
GROUP ===>                    *** MEMBER LEVEL BROWSE ***
                                POLICY NUMBER ===>
                              EMPLOYEE NUMBER ===>
                           EMPLOYEE LAST NAME ===>

  POLICY NUMBER:
     ISSUE DATE:
   COMPANY CODE:
  POLICY STATUS:
  DISC ELIGIBLE:
 EFFECTIVE DATE:
   PAID-TO-DATE:
      FREQUENCY:
   LAST PREMIUM:
    APPLIED DIV:
 LOAN REPAYMENT:
  LOAN INTEREST:
    LAST EDITED:
 CHANGE PENDING:
 SUSPENSE MONEY:
  BILL DAY CODE:
  SEE USER NOTE:
 NOTE:
                                                  0328HB5021   BJI04089212201900
 ENTER GROUP AND EITHER POLICY #, EMPLOYEE #, OR EMPLOYEE LAST NAME
```

This screen allows you to see the individual information for
a member of a group plan. It will show the following:

- policy number
- issue date
- company code
- policy status and effective date
- paid-to-date
- frequency
- last premium and applied dividend
- last edit date and who code of person that did edit
- change pending
- notification of money in suspense
- bill date code
- loan repayment and loan interest

```
                          *** MEMBER LEVEL EDIT ***
    GROUP ===>            POLICY NUMBER ===>

    NAME OF INSURED:
    EMPLOYEE NUMBER:
         ISSUE DATE:
       COMPANY CODE:
      POLICY STATUS:
     EFFECTIVE DATE:
       PAID-TO-DATE:
          FREQUENCY:
       LAST PREMIUM:
        APPLIED DIV:
     LOAN REPAYMENT:
      LOAN INTEREST:
        LAST EDITED:
     CHANGE PENDING:
     SUSPENSE MONEY:
       LTD OVERRIDE:
      BILL DAY CODE:
    DISCNT ELIGIBLE:
    NOTE:
                                                 0328HB5021   BJIO4089212062900
    *ENTER GROUP NUMBER, LINE-OF-BUSINESS, AND POLICY NUMBER
```

This will allow you to edit information to a member on the group plan. The following can be changed on this screen:

- name of insured
- employee number
- company code
- Note

```
                        *** CREATE A NEW MEMBER ***

  GROUP ===>              POLICY NUMBER ===>

  NAME OF INSURED:                      REQUIRED, LAST NAME FIRST
  EMPLOYEE NUMBER:                      REQUIRED
       ISSUE DATE: MMDDYY               REQUIRED
     COMPANY CODE:                      REQUIRED
    POLICY STATUS:                      REQUIRED
   EFFECTIVE DATE: MMDDYY               REQUIRED
     PAID-TO-DATE: MMYY                 REQUIRED EXCEPT FOR ULA
        FREQUENCY:                      REQUIRED
      LAST EDITED:
   CHANGE PENDING:
   SUSPENSE MONEY:
  LAST TRANS DATE: MMDDYY               REQUIRED EXCEPT FOR ULA
    DISC ELIGIBLE:                      REQUIRED FOR DISABILITY
  NOTE:



                                     0328HB5021  BJIO4089212065900
  PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

Transactions from this screen will add a new member to an established group plan. The required fields to complete will show on the right hand side of the screen. This screen will do everything to add a policy except; change the notices to "3" and change the insured's name and social security number. This has to be done manually the next day.

```
                        *** CANCEL A GROUP MEMBER ***
    GROUP ===>                      POLICY NUMBER ===>
                               EMPLOYEE NUMBER ===>
                            EMPLOYEE LAST NAME ===>


            NOTE: SPECIFY POLICY NUMBER IF YOU WISH TO CANCEL A SPECIFIC
                  POLICY; EMPLOYEE NUMBER OR NAME IF YOU WISH TO CANCEL
                  ALL OF THE POLICIES ASSOCIATED WITH THAT MEMBER.  THE
                  AFFECTED DATA WILL BE RETAINED BUT FLAGGED AS CANCELED
                  ON THE GROUP BILLING MASTER FILE AND ALL ADMINISTRATIVE
                  MAINTENANCE WILL BE GENERATED.



                                              0328HB5021  BJIO4089212072900
  ENTER GROUP AND EITHER POLICY #, EMPLOYEE #, OR EMPLOYEE LAST NAME
```

This will remove a member from the group plan. This will do everything to remove the policy from the plan except; change the notices to "2", change the premium mode and change the insured's name and social security number. This will have to be done manually the same day.

Vtg? OFI? this ASP Tx will update!

```
                    *** REACTIVATE A GROUP MEMBER ***
GROUP ===>                    POLICY NUMBER ===>
                            EMPLOYEE NUMBER ===>
                         EMPLOYEE LAST NAME ===>


        NOTE: SPECIFY POLICY NUMBER IF YOU WISH TO REACTIVATE A SPECIFIC
              POLICY; EMPLOYEE NUMBER OR NAME IF YOU WISH TO REACTIVATE
              ALL OF THE POLICIES ASSOCIATED WITH THAT MEMBER.  YOU WILL
              BE ISSUED A PROMPT ASKING IF YOU WANT TO GENERATE
              TRANSACTIONS TO THE ADMINSTRATIVE FILE(S) TO REBUILD THE
              GROUP TRAILER INFO. VTG TRANSACTIONS WILL BE GENERATED
              WITHOUT HAVING TO USE THE PROMPT, JUST ENTER DATA AND
              HIT ENTER.




                                          0225HB5021  BJIO4039213414500
ENTER GROUP AND EITHER POLICY #, EMPLOYEE #, OR EMPLOYEE LAST NAME
```

This screen will generate transactions to reverse all
actions of the GB24 screen. This screen will only work if
the member still shows on the group roll call as cancelled.
If it is not on the roll call it will be treated as a
regular add to the group plan.

```
                    *** SWITCH MEMBER TO A NEW GROUP ***
GROUP ===>                           POLICY NUMBER ===>
                                   EMPLOYEE NUMBER ===>
                                EMPLOYEE LAST NAME ===>

SWITCH MEMBER TO GROUP ===>


              NOTE: SPECIFY POLICY NUMBER IF YOU WISH TO SWITCH A SPECIFIC
                    POLICY; EMPLOYEE NUMBER OR NAME IF YOU WISH TO SWITCH
                    ALL OF THE POLICIES ASSOCIATED WITH THAT MEMBER.  THE
                    AFFECTED DATA WILL APPEAR UNDER THE NEW GROUP AND ALSO
                    REMAIN UNDER THE OLD GROUP, FLAGGED AS CANCELED AND
                    TRANSACTIONS WILL BE GENERATED TO EACH POLICY'S SYSTEM.



                                              0225HB5021   BJI04039213423000
ENTER GROUP AND EITHER POLICY #, EMPLOYEE #, OR EMPLOYEE LAST NAME
```

This screen will allow you to switch a policy that is
currently on a group billing plan to another established
group billing plan.

```
                          *** DELETE A GROUP MEMBER ***
     GROUP ===>                          POLICY NUMBER ===>
                                       EMPLOYEE NUMBER ===>
                                    EMPLOYEE LAST NAME ===>


               NOTE: SPECIFY POLICY NUMBER IF YOU WISH TO DELETE A SPECIFIC
                     POLICY; EMPLOYEE NUMBER OR NAME IF YOU WISH TO DELETE
                     ALL OF THE POLICIES ASSOCIATED WITH THAT MEMBER.  NO
                     TRANSACTIONS ARE GENERATED.
```

```
                                            0225HB5021   BJIO4039213425400
     ENTER GROUP AND EITHER POLICY #, EMPLOYEE #, OR EMPLOYEE LAST NAME
```

This screen will only remove a policy from the group billing
roll call. No transactions are generated to the policy
side.

ROLL CALL BY POLICY NUMBER

GROUP ==>   NAME:

> POLICY   NAME OF INSURED   EMPLOYEE# PD-TO   NET DUE   STATUS FREQ

                                                  0225HB5021   BJI04039213592200
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU

All policies associated with the group billing plan will be
listed on this screen in policy number order.

ROLL CALL BY NAME OF INSURED

GROUP ===>   NAME:

> NAME OF INSURED   EMPLOYEE#   POLICY   PD-TO   NET DUE   STATUS FREQ

                                                               0328HB5021   BJI04089212080000
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU

All policies associated with the group billing plan will be
listed on this screen in alphabetical order by insured's
last name.

ROLL CALL BY EMPLOYEE NUMBER

GROUP ===>   NAME:

> EMPLOYEE#   NAME OF INSURED   POLICY   PD-TO   NET DUE   STATUS FREQ

PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU   0225HB5021   BJI04039214004300

All policies associated with the group billing plan will be
listed on this screen in employee number order.

*** PENDING MAINTENANCE FOR ADMINISTRATIVE MASTERS ***

GROUP ===>   (ZERO FOR ALL)   NAME:

 GROUP   POLICY   WHO   DATE   LVL   FIELD NAME   NEW VALUE

                                                    0328HB5021   BJI04089212083200
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU

This screen will list any pending transactions that have
been processed on any group billing plan for the current
day. This will only show transactions that were processed
through the Group Billing System.

```
              *** GROUP BILLING USER BULLETIN BOARD (BROWSE) ***
GR #4783, THE INN - IS A PENSION GROUP BILLED BY ASI.  ALL CORRESPONDENCE
NEEDS TO BE FORWARDED EITHER TO PENSION-SUE MACLEOD OR ASI-EVELYN PRESTON
DEPENDING ON TYPE OF CORRESPONDENCE.   PREM BILL IS NOT TO PROCESS ANY
THING ON THESE.   TWO OTHER GROUPS ARE GR #4264 AND GR #4875 AND #4843.
```

```
PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU
```

This will allow you to see any messages or warnings
pertaining to a group billing plan that a processor wants
everyone to be aware of.

*** GROUP BILLING USER BULLETIN BOARD (EDIT) ***
GR #4783, THE INN - IS A PENSION GROUP BILLED BY ASI. ALL CORRESPONDENCE
NEEDS TO BE FORWARDED EITHER TO PENSION-SUE MACLEOD OR ASI-EVELYN PRESTON
DEPENDING ON TYPE OF CORRESPONDENCE. PREM BILL IS NOT TO PROCESS ANY
THING ON THESE. TWO OTHER GROUPS ARE GR #4264 AND GR #4875 AND #4843.

PF3 RETURNS PREVIOUS MENU; PF4 RETURNS PRIMARY OPTION MENU

This screen will allow you to add, change or delete any
information on the GB51 screen.