ease

Transamerica Connection Guide

Last updated 1/28/2020

Contents

INTRODUCTION

Transamerica is an EaseConnect partner with a simple connection setup and enrollment submitted directly to carriers in real time. This connection is available for companies with as few as 2 employees and brokers can easily add new lines of coverage.

Notes

- If you are using EaseConnect, Transamerica submission through any method other than e-submission will NOT be accepted.

BEFORE YOU BEGIN

If this is the first time setting up the Transamerica connection, after receiving the **Account Structure** (see below) from Transamerica, use Schedule Live Support and the EaseConnect team will walk you through your first case setup.

Supported Products

The following products are supported at Guaranteed Issue:

AccidentAdvance	TransElite
CriticalAssistance Plus	HospitalSelect II
CriticalEvents	Trans$ure
CancerSelect Plus	Trans Select
CriticalAssistance Advance	TransConnect
TransDI Plus	

Required Information

In addition to the standard requirements, ensure the following information is in Ease:

- Annual Salary
- Date of Hire
- Scheduled Hours – Tip: Use **Employee Default Fields**
- Pay Cycle
- Tobacco User (Critical Illness)
- Location (Segmented Billing)

Adds, Changes & Terminations

New hires, qualifying life events and terminations are handled through Ease and are automatically sent to Transamerica on a weekly basis.

Coming soon, it will be a requirement that all adds, changes, and terminations are processed in the Changes section of the system in order for them to be transmitted to Transamerica.

Enrollment or demographic changes should be made directly in Ease. Information changed with Transamerica results in information reverting to what is in Ease when the file is sent.

Request Monthly Rates

Transamerica typically provides weekly rates in proposals. Request monthly rates from Transamerica. Otherwise, you will run into rounding issues and invalid rate errors.

GETTING STARTED

If you are using custom built plans, allow time for Transamerica review and approval before Open Enrollment.

Account Structure

1. Submit new sold case direct to Transamerica using TransTrack.
   - Online process is quick and prevents erroneous or missing information.
   - Choose Other Vendor in Enrollment Information then choose Ease from drop menu.
   - The 8 to 10 days setup can happen during Open Enrollment.
2. Use Group Number and Agent Number provided in Transamerica email during Ease setup.

Account Structure

Group Settings	
EDI Field	**EDI Data**
[EDI_ACCOUNT_ID]	XYZ1234
[EMPLOYER_ASSOCIATION_NAME]	ABC Company
[GROUP_NUMBER] - (Use Code Only)	G000012345 - Location ABC G000054321 - Location XYZ
[DIVISON_NUMBER] - (Use Code Only)	D000000001 - Weekly D000000002 - Biweekly D000000003 - Semimonthly D000000004 - Monthly
[DOMICILE_STATE]	NY
[AGENT_NUMBER] - (Use Code Only)	TR12345 - James Bond
[PRODUCT_CODE, PLAN_CODE]	See CODES Below
[CLASS_TYPE]	ALLEMPLOYEES

Product Settings		
Product	**[PLAN_CODE]**	**[PRODUCT_CODE]**
AccidentAdvance	PLAN1	AV
CriticalEvents	PLAN1	CE
HospitalSelect II	PLAN1	H2

Employee Option Settings		
Product/Option	**[EMP_OPTION%_CODE]**	**[EMP_OPTION%_DETAIL]**

EASE SETUP

Add Plans

Ease has certain plans in the Ease rate library based on state and product type. There are several Express plans added for California, as well as Gap plans in states where Gap plans are shelf rated and available.

From Company Benefits > Actions
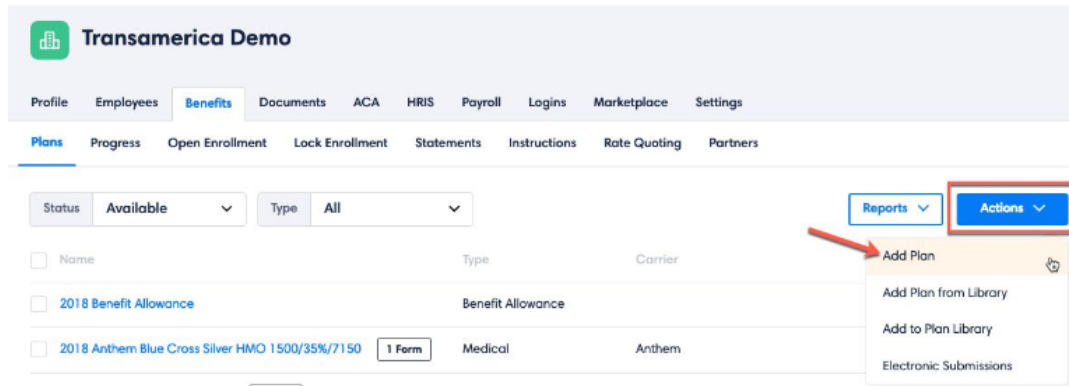
1. Choose **Add Plan**.

2. Choose plan type from drop menu.
3. Enter **Plan Name**.
4. Enter **Effective Date.**
5. Click **Add Plan.**

Critical Illness Plan Setup

For CriticalAssistance Plus, CriticalAssistance Advance and CriticalEvents, if using Ease Rate Library, everything should be correct. If not, ensure the plans are set up properly based on the following:

Level of Coverage

If offering multiple levels of coverage, i.e. $10,000 and $15,000, you must build as separate plans.

| | 2018 CI 10K | | Critical Illness | Transamerica | 8/1/2018 | 7K4GLK |
| | 2018 CI 15K | | Critical Illness | Transamerica | 8/1/2018 | EZTEMQ |

Enable Tobacco

For plans rated based on tobacco use, to to Company > Settings > Optional Fields and check **Show Tobacco User**.
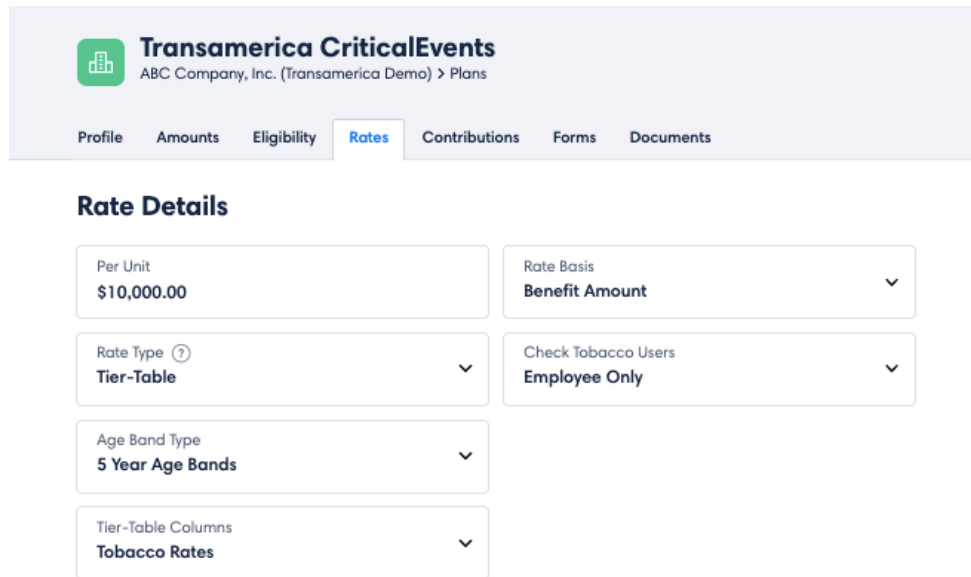

Dependent Coverage

One benefit level must be chosen by the employee for the entire family. Rates are based on that benefit level. When building the plan, use the same benefit level for employee and dependents for accurate rates. Dependent coverage is issued for 50% of the elected benefit per plan summary.

Rate Format

For Critical Illness Plans, in Plan > Rates, enter the following:

- Per Unit = Enter the level of coverage
- Rate Type = Tier Table
- Age Band Type = Select either 5 Year
- Tier-Table Columns = Select Tobacco, if applicable, or leave as default

Using monthly rates provided by Transamerica, enter them as follows for both Non-Tobacco and Tobacco:

- EE Only - enter individual rates for correct age band
- EE + SP – enter 2 parent family rates for correct age band
- EE + 1 CH - enter 1 parent family rates for correct age band
- EE + CH – enter 1 parent family rates for correct age band
- Family – enter 2 parent family rates for correct age band

Age	EE Only (Non-Tobacco)	EE + SP (Non-Tobacco)	EE + 1 CH (Non-Tobacco)	EE + CH (Non-Tobacco)	Family (Non-Tobacco)	EE Only (Tobacco)	EE + SP (Tobacco)	EE + 1 CH (Tobacco)	EE + CH (Tobacco)	Family (Tobacco)
0-17	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
18-24	$3.30	$6.40	$3.65	$1.00	$6.40	$0.00	$0.00	$0.00	$0.00	$0.00
25-29	$3.30	$6.40	$3.65	$5.00	$6.40	$0.00	$0.00	$0.00	$0.00	$0.00
30-34	$3.30	$6.40	$3.65	$5.00	$6.40	$0.00	$0.00	$0.00	$0.00	$0.00
35-39	$6.30	$12.15	$6.95	$6.95	$12.15	$0.00	$0.00	$0.00	$0.00	$0.00

To add pre-approved plans from the Ease Rate Library, add the plan, then go to the rate library.

From Company > Benefits > Plans

1. Click **Actions**.
2. Choose **Add Plan**.

3. Complete plan details in **Add Plan** dialog box.
4. Click **Add Plan**.

Add Rates

Once you have added the plan, go to Rates and add rates from the Ease Rate Library. These rate plans have been reviewed and approved, making it easy for you to set up and ensure accurate data.

Ease Rate Library

From Company > Plans > Plan > Rates.

1. Choose **Set Rates From Library**.
2. Choose **Ease** plan library.

3. Choose **Transamerica** as Carrier.
4. Enter/Choose all plan details from drop menus.
   - Product availability is based on plan availability by state.
   - Rates, eligibility and language will be pre-populated.
5. If sold plan is not available, use as a template and enter appropriate rates, etc.
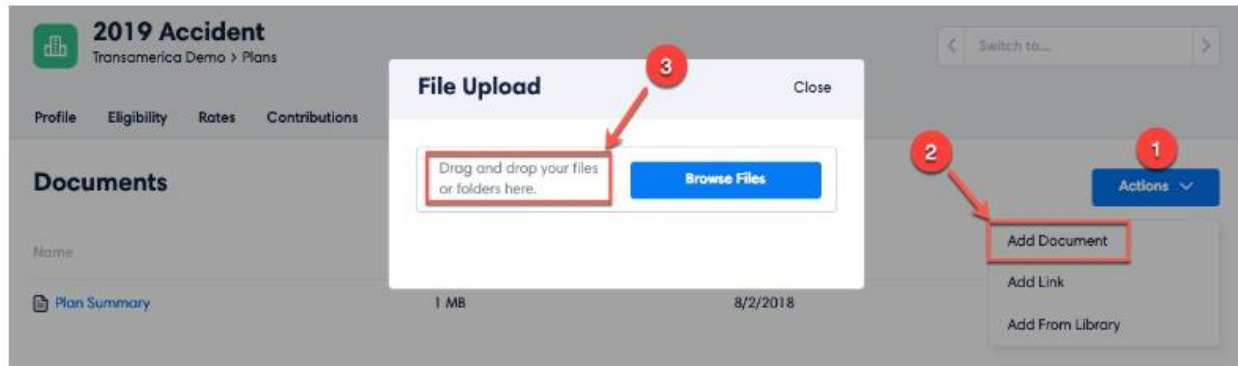
Manually Add Rates

When manually adding plans and/or rates, request MONTHLY rates and do NOT convert other frequencies to MONTHLY, as it will lead to conversion errors and likely rate discrepancy upon submission.

Add Documents

To provide plan details to employees, add plan brochures from Transamerica's Express Plans marketing page.

From Company > Plans > [Plan] > Documents

1. Click **Actions**.
2. Choose **Add Document**.
3. **Drag and drop** or **Browse Files** and upload document(s) or folder(s).

Add Contributions

Voluntary benefits typically have 0% Employer Contribution/100% Employee Contribution.

From Company > Plans > [plan] > Contributions

1. Quickest way is to choose **Employer** from **Contribution Type** drop menu.
2. Leave all contributions blank to signify 0%.
3. Otherwise, if adding as an Employee contribution, choose **Employee** as **Contribution Type**.
4. Enter 100% for all **Contribution ($/%)**.
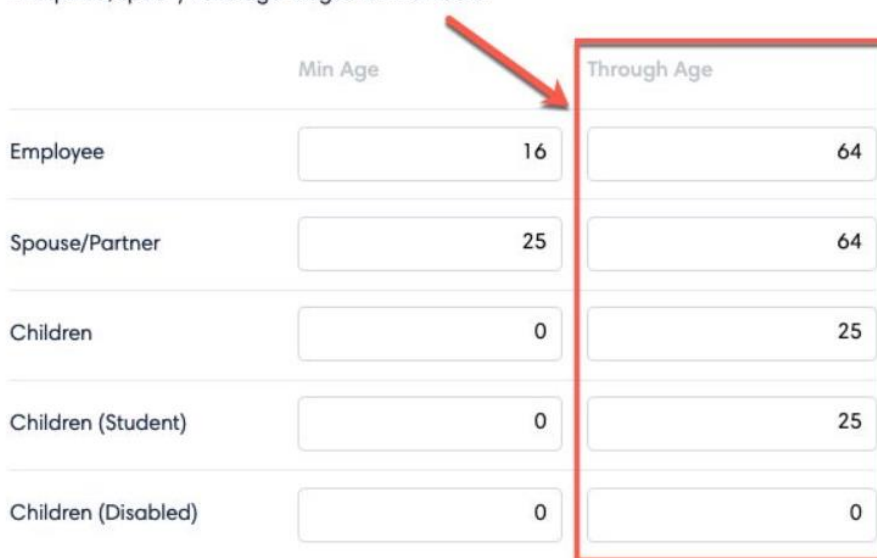
Eligibility Based on Age

If employees or spouses are not eligible after age 65:

From Company > Plans > [plan] > Benefits > Eligibility

Age Eligibility

If required, specify valid age ranges for members.

	Min Age	Through Age
Employee	16	64
Spouse/Partner	25	64
Children	0	25
Children (Student)	0	25
Children (Disabled)	0	0

1. Add age eligibility details in Plan Eligibility.
2. Specifically, add maximum age of 64 in Through Age.
3. For dependent children, add Through Age of 25.

Enable Connection
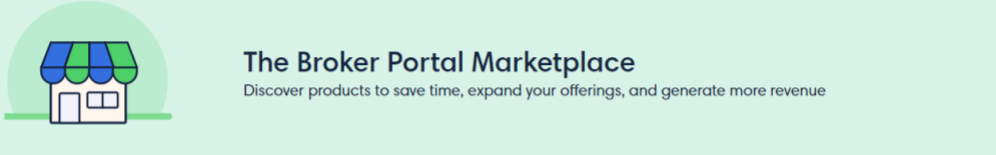
If this is your first time setting up the Transamerica + Ease connection, feel free to Schedule Live Assistance and our support team will walk you through it.

To enable in your broker portal, from Marketplace > EaseConnect
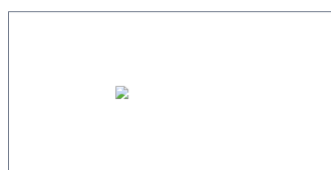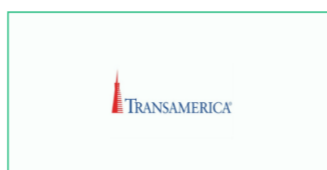
1. Scroll to and click **Transamerica**.
2. Click **Enable**.
3. Click Yes, **Enable**.
4. Click **Save**.

To enable in a company site, from Company > Marketplace > EaseConnect
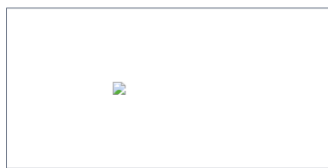
1. Once approved, scroll to and click **Transamerica**.
2. Click **Enable**.
3. Click **Yes, Enable**.
4. Click **Get Started**.

Setup Wizard

The step by step set up wizard walks you through configuring your plans for connection

Setup

1. Using the Group Structure received from Transamerica, enter **Group Number**.

2. If using separate billing categories, add **Partner Codes**.
3. If designating by Division, choose **Category** of **Division Number**.

	D000000001 - Weekly
[DIVISON_NUMBER] - (Use Code Only)	D000000002 - Biweekly
	D000000003 - Semimonthly
	D000000004 - Monthly

4. For **Code** enter [DIVISION_NUMBER] as it appears in Group Structure (code only).
5. If designating by Job Class, choose Category of Class Type.

| [CLASS_TYPE] | ALLEMPLOYEES |

6. For Code enter [CLASS TYPE] as it appears in Group Structure.
7. Complete fields in dialog box to reflect eligibility for billing categories.
8. Select associated plan(s).
9. Click **Add Partner Code**.

Configure Plans

To edit the configuration of the Transamerica plans:

1. Select **Configure** next to plan to be edited.

2. Enter **Plan Type**.
   - Should automatically populate when using an Ease Rate Library.
3. Add Admin Name and Effective Date.
4. Enter **Agent License Number**.
   - Must match Agent ID provided on master policy application.
   - For assistance, reach out to Transamerica sales representative.

Product	[PLAN_CODE]	[PRODUCT_CODE]
AccidentAdvance	PLAN1	AV
CriticalEvents	PLAN1	CE
HospitalSelect II	PLAN1	H2

5. Enter **Product Code** from Group Structure.

- If using Ease rate library, code is pre-populated.

6. Choose **Plan Code** from drop menu as provided in Group Structure.
7. **Bundled Child Rider** – Select this box for any plans with child riders, e.g. *Trans Select* & *Trans Elite* products.
8. Click **Save**.
9. Repeat for all Transamerica products.
10. Click **Next**.

<u>Note</u>: Upon completion of the above plan configuration steps, you will notice the plans have a Connection Status of **Carrier Review**.

Product Code Chart

If plan codes are not provided, use the following during Setup:

AV	AccidentAdvance
CA	CriticalAssistance Plua
CE	CriticalEvents
CN	CancerSelect Plus
CP	CriticalAssistance Advance
DP	TransDI Plus
EL	TransElite
H2	HospitalSelect II
LE	TransLegacy

NC	CriticalAssistance Select
SU	Trans$ure
TH	TeleHealth
TS	Trans Select

Instructions

Descriptions of the plan, as well as educational videos have been provided in the Wizard. You can leave these as they are or modify as needed.

Verification

1. Review.
2. Return and correct noted required fields.
3. When **No missing information found**, click **Next**.
4. Click **Finish**.

ENROLLMENT

Follow traditional Ease process for Open Enrollment.

SUBMITTING TO CARRIER

Once all employee elections have been made, you are ready to submit initial enrollment via Submissions in the Wizard.

Initial Submission

To submit a test file:

1. Click **Add Submission**.

2. Click **Submit to Carrier**.

3. Click **Yes, Submit Enrollment**.
   - Status is updated to **Submitted**.

4. Click **Next**.

5. Click **Finish**.
   - Initial file and plans are sent to Transamerica for review and approval.
   - If any missing or invalid data, details are provided via email from Transamerica and/or in Submission Notes in Ease.
   - Once file is approved and policies have been issued, file is moved to a weekly automated submission for adds, changes and terminations and the plans will be updated to **Connected**.

Renewing Business

Renewing Plans

If current plans are renewing, it is best practice to duplicate the plan(s) and push enrollment using **Renewal Assist** to preserve current plan settings.

Benefits > Plans

1. Select the checkbox next to the plan you are renewing
2. Click **Actions**
3. Choose **Renew Plans** from the drop-down menu
4. Click **Renew Plans**

These plans will default to a status of **Pending**.

New Plans

If new plans are being added at renewal, ensure each Plan Profile's **Carrier** field contains **Transamerica**.

Use the Transamerica setup wizard to configure the plan for the connection.
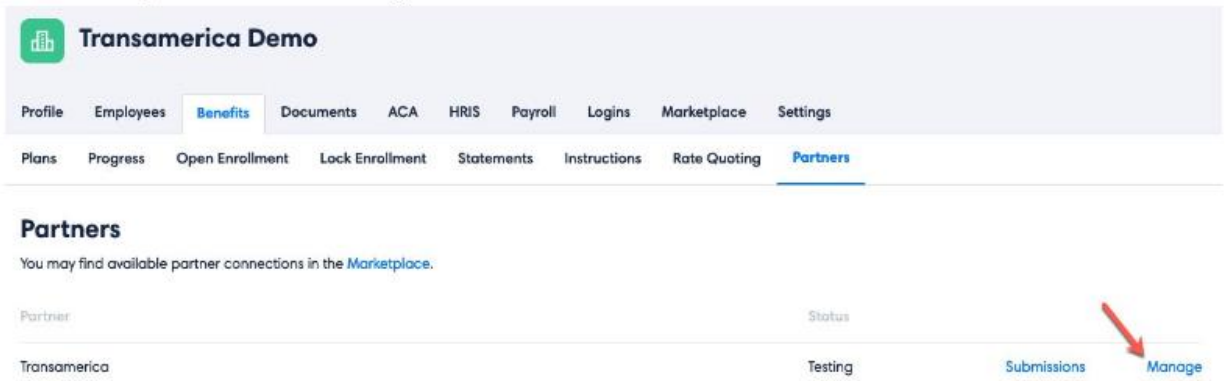
1. In Company > Benefits > Partners, click **Manage** next to Transamerica.
2. Complete **Setup**, **Plans**, **Instructions** and **Verification**.

IMPORTANT: Once you are ready to submit the plans and open enrollment elections to Transamerica, you will need to check the box next to these **Pending** plans and click **Actions** > **Ready to Submit**.
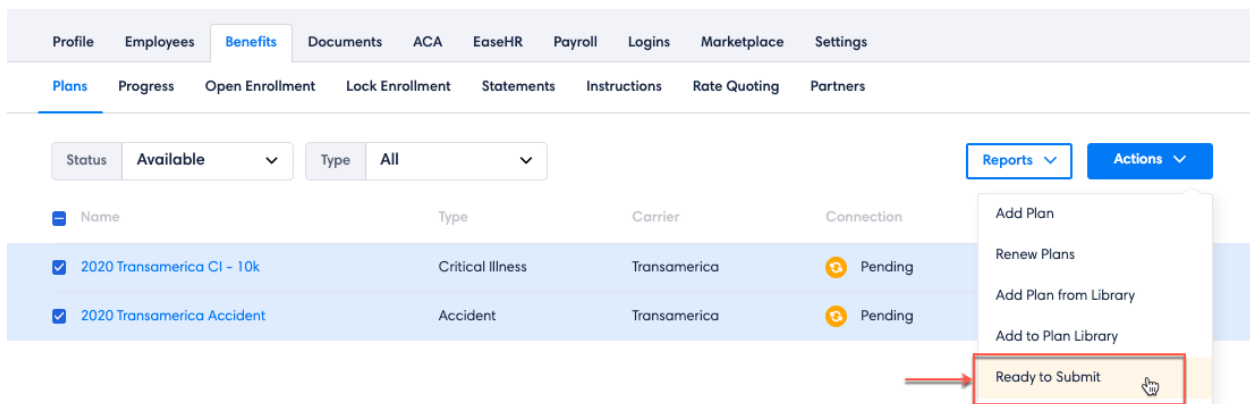
This will update the plan connection status from **Pending** to **Carrier Review** and automatically generate a submission to the carrier.
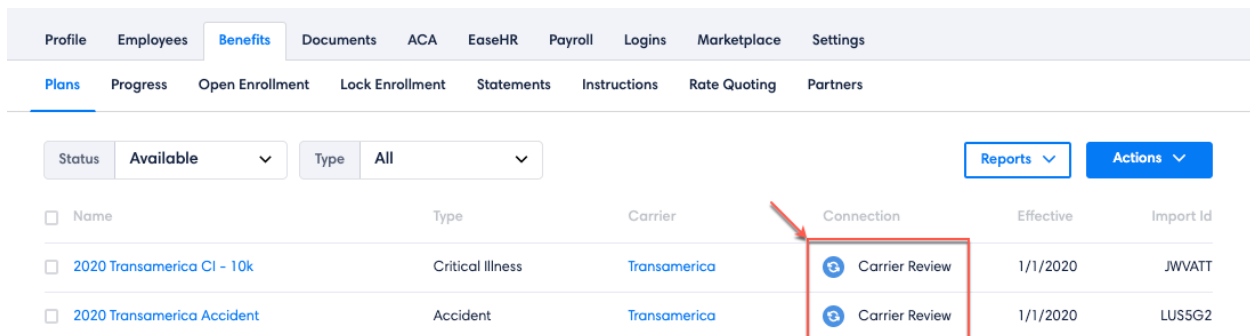
The carrier will review these plans and move them to a status of **Connected**.

MAINTENANCE

Adds, Changes and Terminations

Once initial file has been approved and processed, as well as plans moved to "Connected", all adds, changes and terminations* are handled through Ease and are automatically sent to Transamerica on a weekly basis.

Coming soon, it will be a requirement that all adds, changes, and terminations are processed in the Changes section of the system in order for them to be transmitted to Transamerica.

*Allow up to 30 days for terminations to be processed and reflected in invoice.

SPECIAL CIRCUMSTANCES

Custom Rates

For plans with complex rate structures, such as the Transamerica TransElite product, you can use Custom Rates to accommodate these plan setups.

From Benefits > [plan] > Rates

1. Change **Rate Type** to **Custom**.
2. Click the hyperlink to download **Custom Rate Templates**.

3. Set your custom rate template headers to the following (from left to right):
   a. Benefit Amount – List the benefit amounts in this column
   b. Rate Type – This should be set to 'Table'
   c. Tobacco User – You will need to have a 'Yes' and 'No' for every benefit amount.
   d. Age 0-14, Age 15, Age 16, Age 17, and so on until you've listed all applicable age-bands.

Example-

	A	B	C	D	E	F	G	H
1	Benefit Amount	Rate Type	Tobacco User	Age 0-14	Age 15	Age 16	Age 17	Age 18
2	$10,000	Table	No					
3	$15,000	Table	No					
4	$20,000	Table	No					
5	$10,000	Table	Yes					
6	$15,000	Table	Yes					
7	$20,000	Table	Yes					

4. Leave cells blank on your custom rates import spreadsheet for any age-bands that are listed as 'N/A' on your benefit book from Transamerica.

Example-

TransElite HCV - Universal Life Insurance

With Riders: TI, WML, ADD

Non-Tobacco
Death Benefit Option: A

TRANSAMERICA

Issue Age	$10,000 Face Amount			$15,000 Face Amount			$20,000 Face Amount			Issue Age
	Monthly Premium	Guaranteed Cash Value at Age 65*	Current Cash Value at Age 65*	Monthly Premium	Guaranteed Cash Value at Age 65*	Current Cash Value at Age 65*	Monthly Premium	Guaranteed Cash Value at Age 65*	Current Cash Value at Age 65*	
16	N/A†			N/A†			N/A†			16
17	N/A†			N/A†			N/A†			17
18	N/A†			N/A†			N/A†			18
19	N/A†			N/A†			N/A†			19
20	N/A†			N/A†			N/A†			20
21	N/A†			N/A†			N/A†			21
22	N/A†			N/A†			N/A†			22
23	N/A†			N/A†			N/A†			23
24	N/A†			N/A†			N/A†			24
25	N/A†			N/A†			N/A†			25
26	N/A†			N/A†			N/A†			26
27	N/A†			N/A†			N/A†			27
28	N/A†			N/A†			N/A†			28
29	N/A†			N/A†			N/A†			29
30	N/A†			N/A†			N/A†			30
31	N/A†			N/A†			N/A†			31
32	N/A†			N/A†			N/A†			32
33	N/A†			N/A†			N/A†			33
34	N/A†			N/A†			N/A†			34
35	N/A†			N/A†			N/A†			35
36	N/A†			N/A†			17.87	2,026		36
37	N/A†			N/A†			18.75	2,119		37
38	N/A†			N/A†			19.66	2,208		38
39	N/A†			N/A†			20.63	2,294		39
40	N/A†			N/A†			21.74	2,344	5,819	40
41	N/A†			N/A†			22.89	2,382		41
42	N/A†			18.00	1,611		23.99	2,431		42
43	N/A†			18.95	1,635		25.27	2,454		43
44	N/A†			19.81	1,658		26.42	2,467		44
45	N/A†			20.73	1,676	3,801	27.64	2,474	5,069	45
46	N/A†			22.08	1,743		29.44	2,544		46
47	N/A†			23.47	1,794		31.30	2,596		47
48	N/A†			24.92	1,831		33.23	2,635		48
49	17.62	1,061		26.43	1,859		35.24	2,654		49
50	18.67	1,084	2,241	28.00	1,869	3,360	37.34	2,655	4,479	50
51	19.76	1,094		29.64	1,867		39.52	2,636		51
52	20.90	1,096		31.35	1,849		41.80	2,601		52
53	22.08	1,088		33.13	1,817		44.17	2,545		53
54	23.32	1,067		34.98	1,768		46.64	2,468		54

Leave "N/A" age-bands blank.

Benefit Amount	Rate Type	Tobacco User	Age 0-14	Age 15	Age 16	Age 17	Age 18	Age 19	Age 20	Age 21	Age 22	Age 23	Age 24	Age 25	Age 26	Age 27	Age 28	Age 29	Age 30	Age 31	Age 32	Age 33	Age 34	Age 35	Age 36	Age 37	Age 38	Age 39
$10,000	Table	No																										
$15,000	Table	No																										
$20,000	Table	No																						$17.87	$18.75	$19.66	$20
$10,000	Table	Yes																										
$15,000	Table	Yes																					$17.36	$18.12	$19.07	$20.02	$21
$20,000	Table	Yes																$18.05	$18.80	$19.63	$20.46	$21.38	$22.29	$23.15	$24.16	$25.42	$26.70	$28
$25,000	Table	No																	$17.69	$18.36	$19.17	$19.90	$20.62	$21.36	$22.34	$23.44	$24.58	$25
$30,000	Table	No											$17.46	$17.95	$18.48	$19.04	$19.72	$20.56	$21.23	$22.03	$23.00	$23.88	$24.74	$25.64	$26.80	$28.12	$29.49	$30
$40,000	Table	No			$18.36	$18.81	$19.26	$19.74	$20.38	$21.20	$21.76	$22.36	$23.28	$23.94	$24.64	$25.39	$26.30	$27.42	$28.30	$29.37	$30.67	$31.84	$32.99	$34.18	$35.74	$37.50	$39.32	$41
$25,000	Table	Yes											$17.51	$18.02	$18.74	$19.30	$19.89	$20.69	$21.61	$22.57	$23.50	$24.54	$25.58	$26.73	$27.87	$28.94	$30.20	$31.78
$50,000	Table	Yes			$17.54	$18.02	$18.52	$19.02	$19.65	$20.43	$21.01	$21.62	$22.49	$23.15	$23.86	$24.83	$25.93	$27.08	$28.20	$29.45	$30.69	$32.07	$33.44	$34.73	$36.23	$38.13	$40.04	$42
$40,000	Table	Yes			$23.39	$24.03	$24.69	$25.37	$26.21	$27.24	$28.02	$28.83	$29.98	$30.87	$31.82	$33.11	$34.57	$36.11	$37.60	$39.27	$40.92	$42.76	$44.59	$46.30	$48.31	$50.84	$53.39	$56
$50,000	Table	No			$22.95	$23.51	$24.08	$24.67	$25.48	$26.49	$27.20	$27.94	$29.09	$29.92	$30.80	$31.73	$32.87	$34.27	$35.38	$36.72	$38.33	$39.80	$41.23	$42.73	$44.67	$46.87	$49.15	$51
$75,000	Table	No			$34.42	$35.26	$36.12	$37.01	$38.22	$39.74	$40.80	$41.92	$43.64	$44.89	$46.20	$47.60	$49.31	$51.40	$53.07	$55.07	$57.50	$59.71	$61.85	$64.09	$67.01	$70.31	$73.73	$77
$100,000	Table	No			$45.90	$47.01	$48.16	$49.35	$50.96	$52.99	$54.40	$55.89	$58.19	$59.85	$61.61	$63.46	$65.75	$68.54	$70.76	$73.43	$76.66	$79.61	$82.46	$85.45	$89.35	$93.75	$98.30	$103
$50,000	Table	Yes			$29.24	$30.04	$30.87	$31.71	$32.76	$34.04	$35.02	$36.04	$37.48	$38.59	$39.77	$41.39	$43.21	$45.13	$47.00	$49.09	$51.15	$53.46	$55.74	$57.88	$60.39	$63.56	$66.74	$70
$75,000	Table	Yes			$43.86	$45.06	$46.30	$47.56	$49.14	$51.07	$52.54	$54.06	$56.22	$57.89	$59.66	$62.08	$64.82	$67.70	$70.50	$73.63	$76.73	$80.19	$83.60	$86.82	$90.58	$95.33	$100.11	$105
$100,000	Table	Yes			$58.48	$60.08	$61.73	$63.41	$65.51	$68.09	$70.05	$72.08	$74.96	$77.18	$79.55	$82.77	$86.43	$90.26	$94.00	$98.17	$102.30	$106.91	$111.47	$115.75	$120.78	$127.11	$133.48	$140
$125,000	Table	No			$57.37	$58.77	$60.20	$61.69	$63.70	$66.24	$68.00	$69.86	$72.74	$74.81	$77.01	$79.33	$82.19	$85.67	$88.45	$91.79	$95.83	$99.51	$103.08	$106.82	$111.68	$117.18	$122.88	$128
$150,000	Table	No			$68.85	$70.52	$72.23	$74.02	$76.43	$79.48	$81.60	$83.83	$87.28	$89.77	$92.41	$95.20	$98.62	$102.81	$106.13	$110.15	$115.00	$119.41	$123.70	$128.18	$134.02	$140.62	$147.46	$154
$200,000	Table	No			$87.70	$89.93	$92.23	$94.62	$97.85	$101.93	$104.75	$107.74	$112.35	$115.68	$119.21	$122.93	$127.51	$133.11	$137.56	$142.92	$149.41	$155.31	$161.03	$167.03	$174.84	$183.66	$192.81	$202
$125,000	Table	Yes			$73.10	$75.10	$77.16	$79.27	$81.89	$85.11	$87.56	$90.10	$93.69	$96.48	$99.43	$103.47	$108.04	$112.83	$117.50	$122.71	$127.88	$133.64	$139.34	$144.69	$150.97	$158.89	$166.85	$175
$150,000	Table	Yes			$87.72	$90.12	$92.60	$95.12	$98.27	$102.13	$105.07	$108.12	$112.43	$115.77	$119.32	$124.16	$129.64	$135.39	$140.99	$147.26	$153.46	$160.37	$167.21	$173.63	$181.17	$190.67	$200.22	$210
$200,000	Table	Yes			$112.85	$116.05	$119.35	$122.73	$126.93	$132.09	$136.01	$140.09	$145.84	$150.31	$155.05	$161.51	$168.83	$176.51	$183.98	$192.35	$200.63	$209.86	$218.99	$227.57	$237.64	$250.33	$263.08	$276

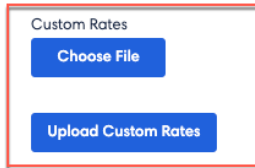Once you've completed your rate import spreadsheet, you are ready to import the .csv file in Ease.

From Benefits > [plan] > Rates

5. Select **Choose File** and select the spreadsheet from your computer.

6. Select **Upload Custom Rates**.

Custom Rates

Upload custom rates structures that are based on benefit amounts by using our Custom Rate Templates.

Custom Rates

Choose File

Upload Custom Rates

From Benefits > [plan] > Amounts

7. Set **Benefit Type** to **Custom**.
8. Type 'custom' in **Custom Amounts** field.
9. Test these custom rates using dummy employees to ensure accuracy.

If you have questions or would like assistance with this process, please use Schedule Live Support to connect with our EaseConnect team.

Acceptance Language

Acceptance language required by Transamerica can be added in Forms > Instructions of the plan(s).

Copy and paste the following:

Read the following statements carefully. These are important declarations and required notices that you are agreeing to by completing the electronic enrollment process. By submitting this application, I confirm that I have read and understand the representation statement, fraud warning, and conditions for coverage becoming effective as set forth below.

ELIGIBILITY

I confirm that I understand and agree to the terms below:

a) I am actively at work on a full time basis and able to perform the regular duties of my occupation on the date of enrollment;

b) No proposed insured is disabled; and

c) No proposed insured is covered by any Title XIX program (i.e., Medicaid)*.

   *c) does not apply to residents of AZ, CO, KS, KY, NC, OR, SC, or VA.

STATEMENTS AND AGREEMENTS

I acknowledge that I received an Outline of Coverage describing the insurance for which I am applying.

The insurance you are applying for is supplemental insurance and is not a substitute for major medical coverage. Residents of CA, GA, MA, MN, NJ, and VT cannot apply for supplemental insurance unless they have comprehensive medical coverage. Residents of these states should remove any proposed insured that does not have comprehensive medical coverage before completing the enrollment process.

I understand that coverage will take effect only if my enrollment is approved by the Insurer and the first month's premium has been received by the Insurer, provided I meet any eligibility and coverage effective date requirements listed in the policy/certificate.

Any person who knowingly and with intent to defraud an insurance company or other person files an application or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto may have committed a fraudulent insurance act, which is a crime and may subject such person to criminal and/or civil penalties.

THE INSURANCE YOU ARE APPLYING FOR PROVIDES LIMITED BENEFITS. IF ACCEPTED FOR COVERAGE, READ YOUR POLICY/CERTIFICATE CAREFULLY.

TROUBLESHOOTING

Error	Suggestion
Employee receives error message	- Check for missing required employee information. - If there are locations, divisions, departments or classes are being used, ensure employee has been assigned to one.
No coverage options available	Check employee profile to see if any information makes them ineligible for coverage, i.e. coverage has a max age of 64 and employee is 65.
Missing E-signature	Appears during verification. Create and import file from Company > Employees > Actions > Import Employees with the following: - EID - First Name - Last Name - Relationship - Enrollment Status with "Finish"*

*Do not "finish" employees who are still in their new hire enrollment period.

FAQ's

Employee Status Types

Transamerica's connection sends active employees only.

Incomplete Enrollment

Ease sends only completed elections to Transamerica. In order for an employee's application to be considered "finished", the employee must have signed their enrollment forms which generates and e-signature date. Employees that have not completed the enrollment process by signing their forms will not be sent to Transamerica.

Call Center Enrollments

If you are using a call center environment, use the "Finish-Admin" status to complete enrollment which allows information to be sent to Transamerica.

Pricing

There is no additional cost for the Transamerica connection.

CONTACTS

Transamerica

Contact your local Transamerica Regional Vice President for direction.

Ease

Email: connectionssupport@ease.com

Phone: (702) 800-2690

Live EaseConnect Support: Schedule Live Support