
# GIBS™ Administrator

**In widespread use since 1989, GIBS Administrator** was built to handle the special requirements of multi employer direct bill administration. Designed for TPAs, brokers, insurance companies and others who provide value added services, the **G**roup **I**nsurance **B**illing **S**ystem is feature rich, fully automating administration to minimize labor costs while giving you the flexibility that you need to get and keep more clients. It is the choice of a majority of the nations largest and most successful administrators.

## Easy To Learn And Use

GIBS Administrator is very intuitive, allowing you to get new personnel up and running in a very short time. Using the extensive operator security functions you can limit any operator to the tasks that match their skill level.

Extensive on-line help and a very illustrated User Reference Guide provide quick answers to any questions.

An optional Annual Extended Support Agreement is available that provides unlimited phone support and all updates without charge. It also allows access to our on-line Customer Only area which includes training, practice tips, downloadable updates and much more.

## Quality Software - Exceptional Support

Our commitment is to develop the highest quality products -then back them with exceptional support. Built from the knowledge that comes from years of administration and software experience, our systems are installed in all 50 states and several US Territories. Our users range from small administrators to the largest Fortune 100 companies. We are most pleased that many of the nation's largest benefit law and consulting firms have selected our systems for their own employee plans.

## Integrated

All applications in the CSP Suite can be used alone or fully integrated with each other. From new hire to retiree - you only import or enter data once - then use it in all other applications.

## Complete

GIBS Administrator is complete is all aspects of direct bill administration. Separate categories let you handle any type of non-COBRA continuing coverage for retirees, leave of absence, medical leave or others.

Use a different billing method for each category. For example, use semi-annual coupon billing for retirees and monthly billing for leave.

Full electronic archiving lets you easily store all records on CD, tape or other media. Use the archive search engine to easily find records and reproduce any system correspondence exactly as it was originally output.

Detailed audit trail records are always available for any significant activity. Behind the scene automatic notes are maintained with *who* did what *when*.

Complete accounting functions let you automatically disburse received premiums back to clients, carriers, claim accounts or other entities, even splitting a single payment that must be distributed to multiple entities. Detailed audit trail records of disbursements are automatically output for your client or your file. You can even write the checks automatically.

Cost savings features that others charge extra for are built into GIBS Administrator. Duplex printing, Import-Export, Letter Writer and postal bar codes have always been standard features.

## Web Enabled

CSPWeb is a completely integrated module that can put your direct bill business on the web in a couple of hours. Brand your site with your own text and graphics. Create custom Help screens, add your own Privacy Policy and Terms Of Use documents. Grant access to brokers, clients, plan participants and other authorized users to view, add or edit data. Your client data stays on your servers. There are no on-going per participant or per user fees beyond optional support agreements.

## Automatic

GIBS Administrator was designed from the first byte to minimize labor and maximize profits. It fully automates as many administrative processes as possible. Eligibility letters, billings, grace period notices, termination notices and more than 35 other letters are automatically output based on the current status of the participants in your file when you process. You can run the process for one person, one client or everyone in your file.

You can schedule items to process at different times to even out your workflow. For example, set rate change notices to output on the 15th of the month, billings on the 20th and termination letters any time a process is run.

You can even script the process to run after normal business hours, importing any client new participant files received electronically, run a process to output any notices or letters due out and then sending the very latest eligibility files to your carriers.

benefit plan systems Corporation

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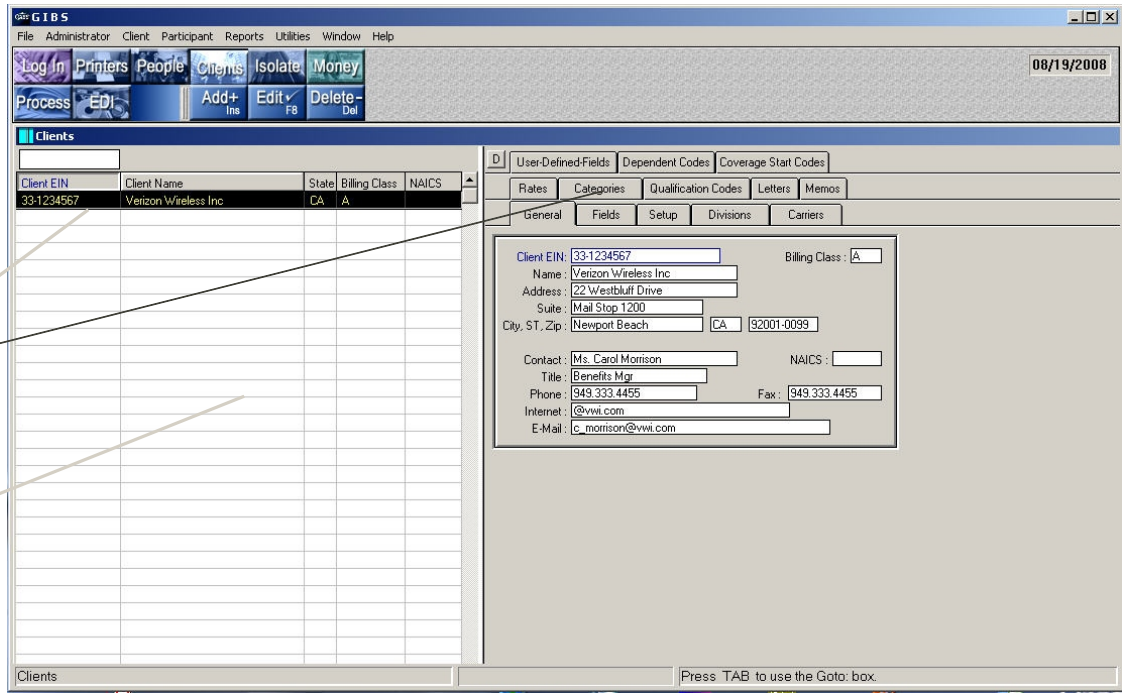
GIBS is easy to learn and use - that's important for any mission critical software in a world where needs and people change frequently but consistent performance is required.

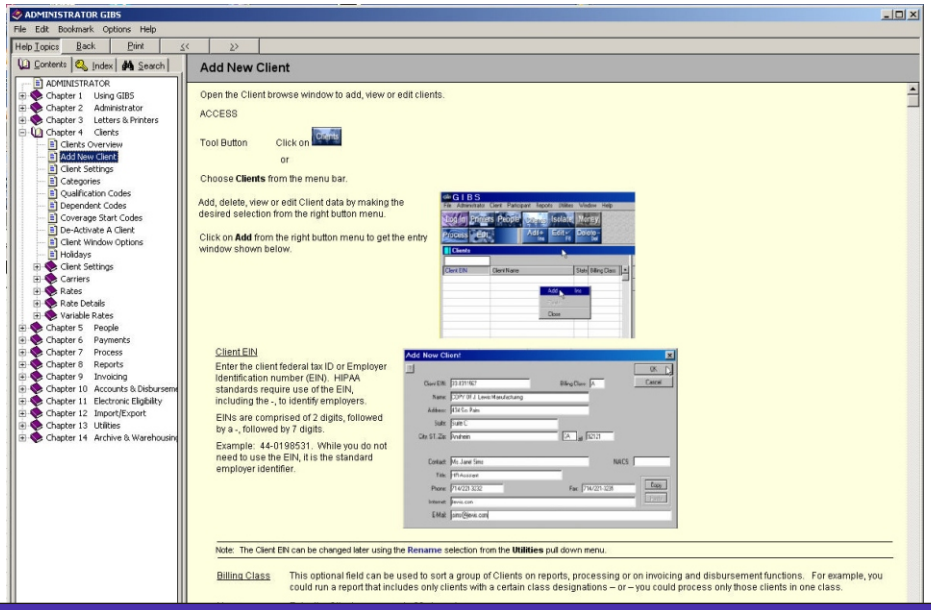
Intuitive tool buttons and menus provide ready access to all program functions.

All information is readily available in the browse - for more detail click on any tab.

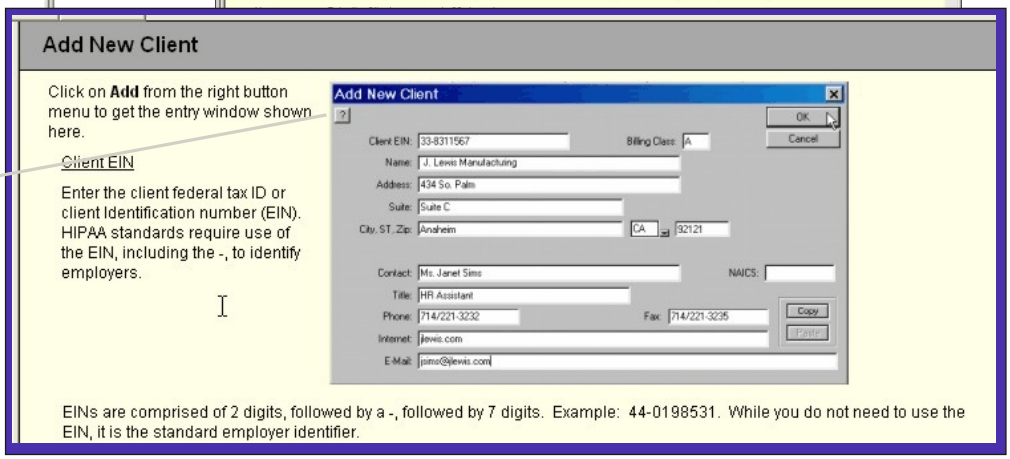
You can choose which fields to display in the browse and easily change the order in which they display.




Click on the HELP button to get on-line, illustrated detailed explanations...

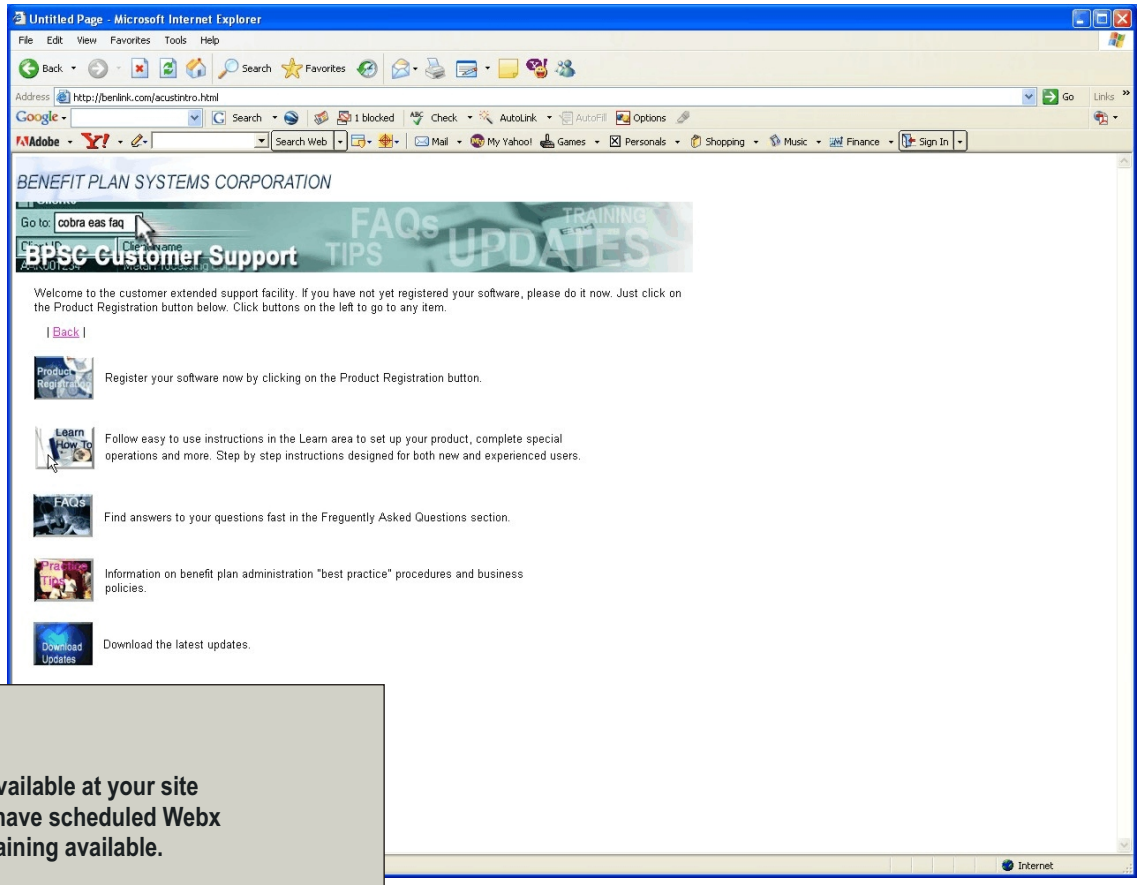



...or on the entry window for very specific help on the field that your cursor is on.



An illustrated User Reference Guide provides step by step instructions on all system functions.


Extended support customers have on-line access to web lessons, practice tips, current legislative developments, FAQs Library and more.

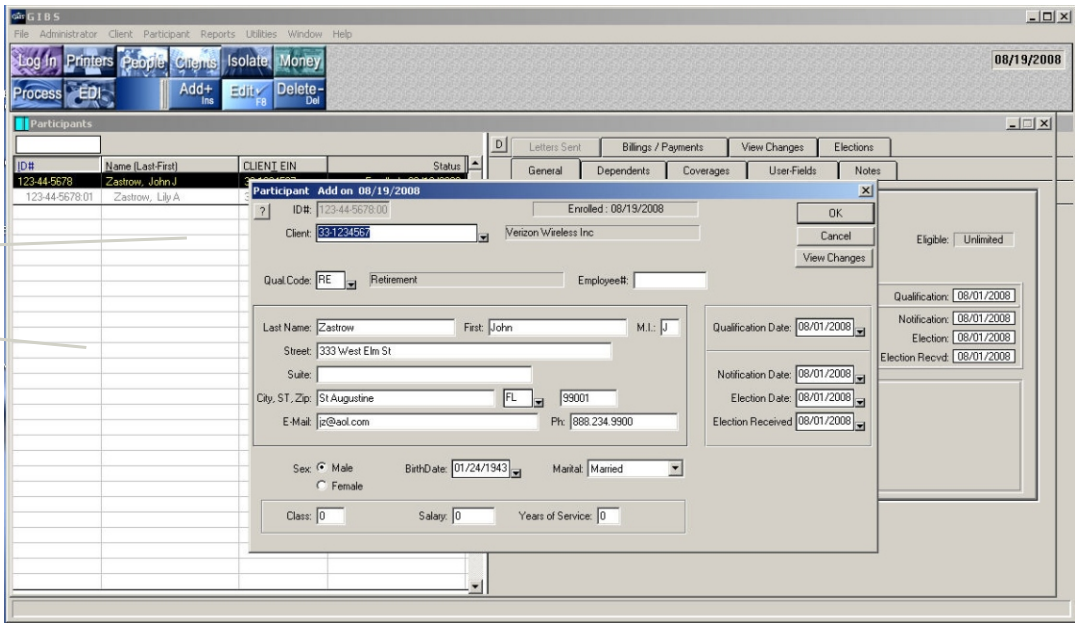



**Custom training is available at your site or at ours. We also have scheduled Webx interactive on-line training available.**

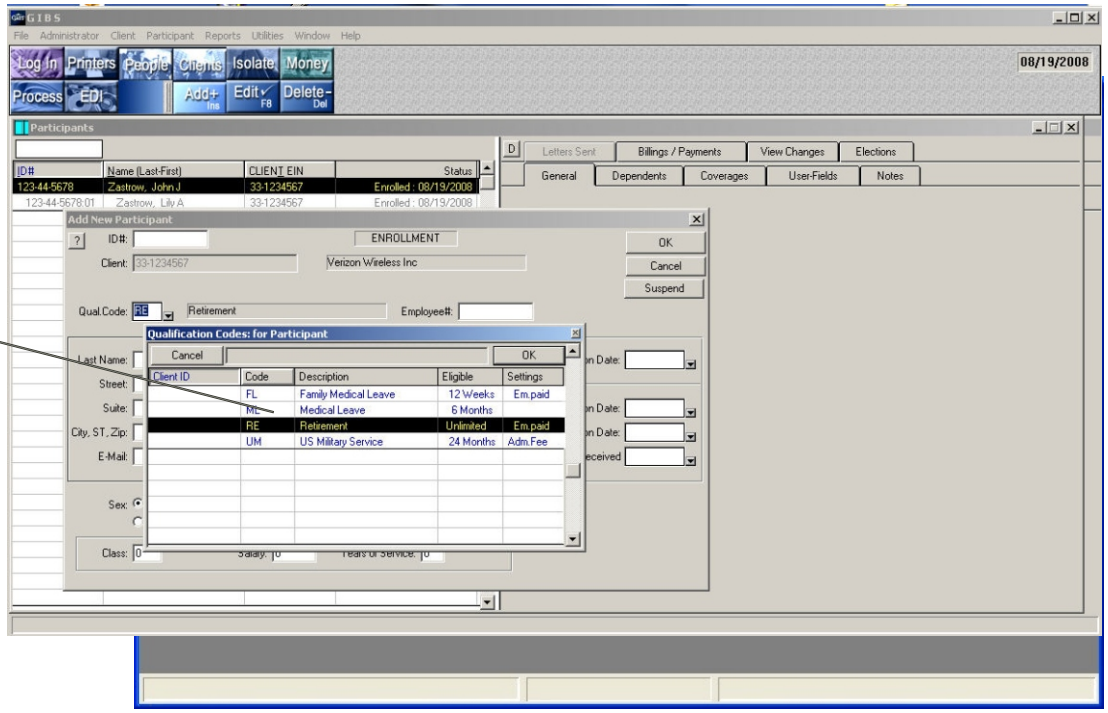
Easy data entry and inquiry features make it simple to provide the kind of right now response that your clients demand in this multi tasking world.

## Some Examples

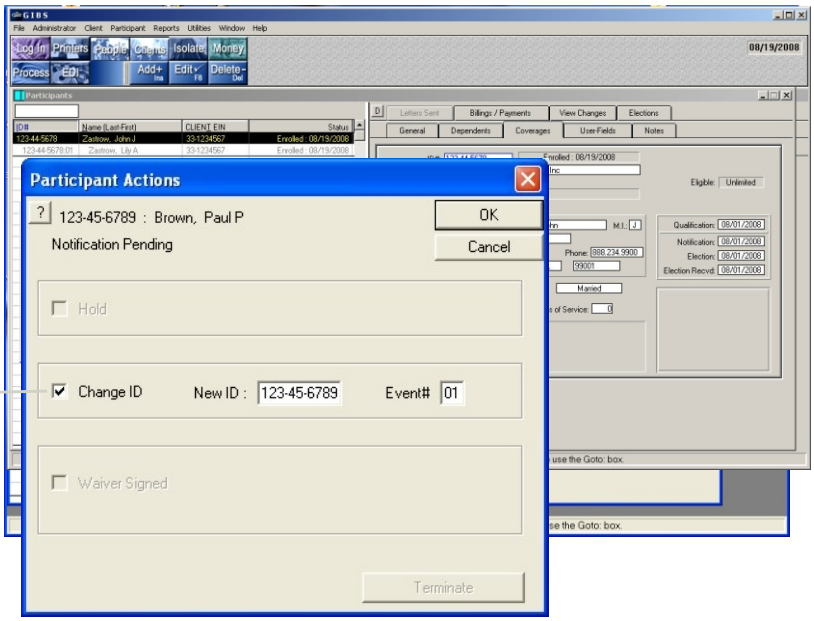
When entering data into date or other fields that use separation characters just type the data -- when you tab the separation characters are automatically inserted.




Minimize errors and speed entry by using the drop down selection windows to complete fields.



## GIBS Administrator includes hundreds of features that you won't really appreciate until you need to use them - features like:




**Event Sequencing**

People often experience more than 1 event. Exp: Leave, return then another leave. The system automatically sequences each event, allowing you to maintain multiple records for the same person.

**Change An ID**

Suppose that you add a person with an incorrect ID - then later need to change it to the correct one. The system lets you make the change in an orderly way, correcting all of the persons files. The only way to make this kind of correction in some of our competitors products is to delete the entire record - then rebuild it.

**Administration Categories**

Separating events by Category allows you to have separate setups, letter files, rates, time frames and more for each Category.

**Scripting**

You can further automate many processes, including participant imports, then automatically processing the data imported, outputting all required letters and even reporting eligibility to your carriers.

**Billing For Multiple Rate Periods**

Often, you will need to produce billings for periods that span multiple rate periods. For example, when you need to produce the next years coupons with a rate change starting with the 3rd coupon. The system automatically produces correct billings for both retro-active and prospective periods, even when multiple rate amounts apply.

**Reprint Letters or Payment Coupons.**

Just point to the person, then choose Reprint from the menu to generate an exact reprint of certain Letters or billing coupons for any from and to selected time period.

**Starting Coverage**

What about clients who have a Health Plan with coverage extending to the last day worked and a Dental Plan that ends the last day of the month? GIBS allows you to set a different start date for each coverage.

**Write Date Activated Reminders**

Automatically remind yourself to check or complete actions for both clients and people by writing memos that will automatically display on the future date you set.

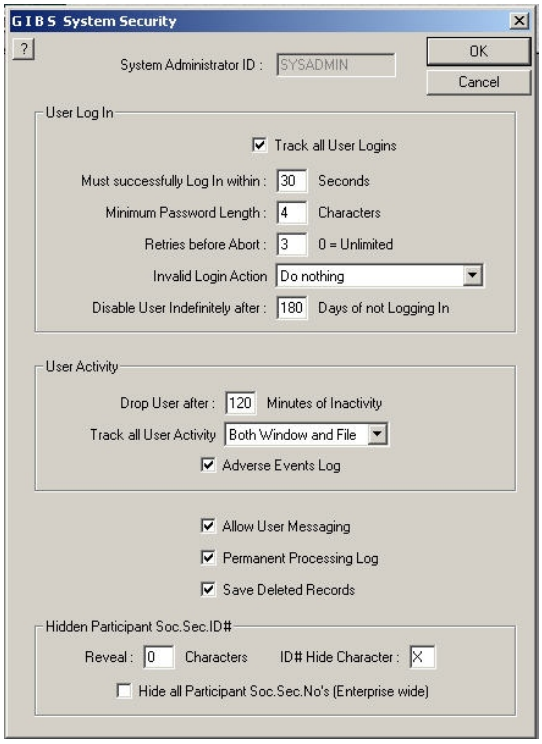
**Recurring Letters**

Suppose a client wants you to periodically check the continued full time student status of any student dependents on the plan.

Create a custom letter then set the interval at which it should automatically output.

**HIPAA Security**

HIPAA requires you to implement very specific security features to safeguard the protected healthcare information in your system. Features that are already in GIBS.




Standards for passwords and log in actions.

Adverse event logging.

Tracking of all user activity.

Optional 128 bit encryption of all data files.

Auto handling of invalid log in.

Auto program exit after an inactive period.

Number of log in retry attempts allowed.

Limit user to very specific activity and/or clients.

## Automatic Processing

GIBS has the logic built-in to *automatically* search through your data files and output whatever is needed for each participant.

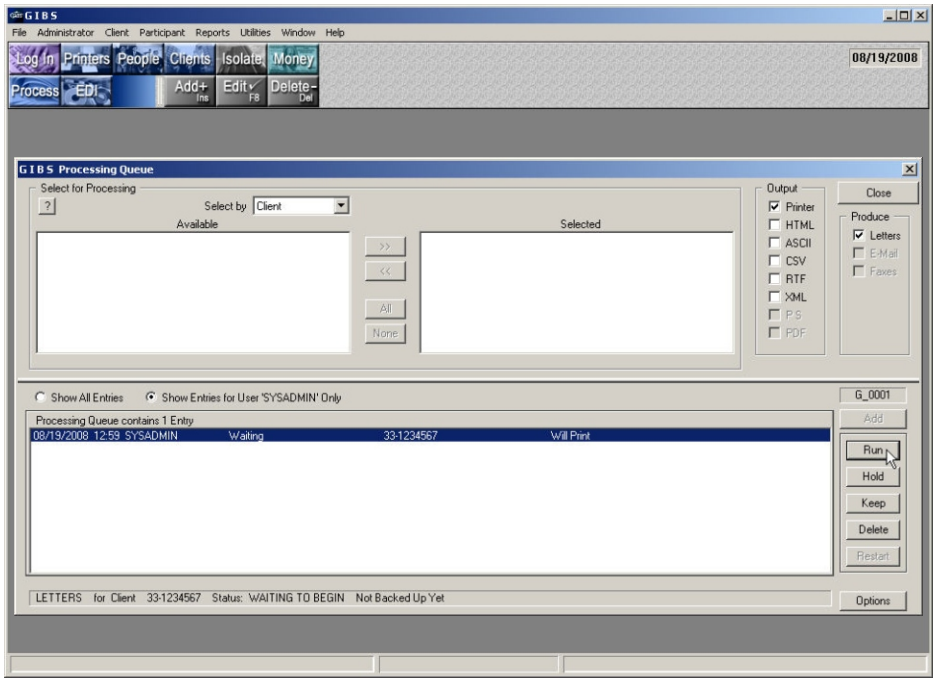
Coverage opportunity letters, rate change notices, grace period letters, partial payment letters, non-payment termination letters, conversion, billings, Certificates of Creditable Periods of Coverage and more than 30 other notices and letters are all output based on the participants or dependents current status.

You enter or import data - then let the system process it based on the parameters that you have set - no need for manual logs, reminders to process by item or any other operator activity required.

Choose to process just one person, one client, a group of clients or all people in your file - you can even schedule items to process at different times.

Output is automatically collated, with all items for each person, within each client, grouped and pre-addressed - ready for a window envelope.

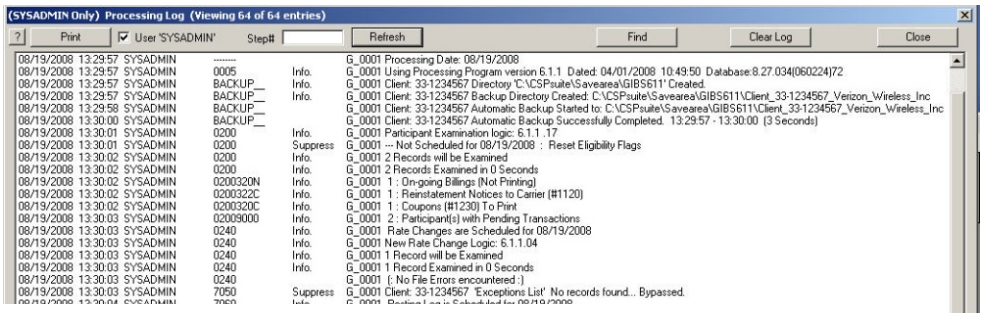
In addition to letters and notices the process outputs multiple logs and other documents that provide detailed audit trail records.




**The process runs in the background, allowing users to continue working while it runs.**

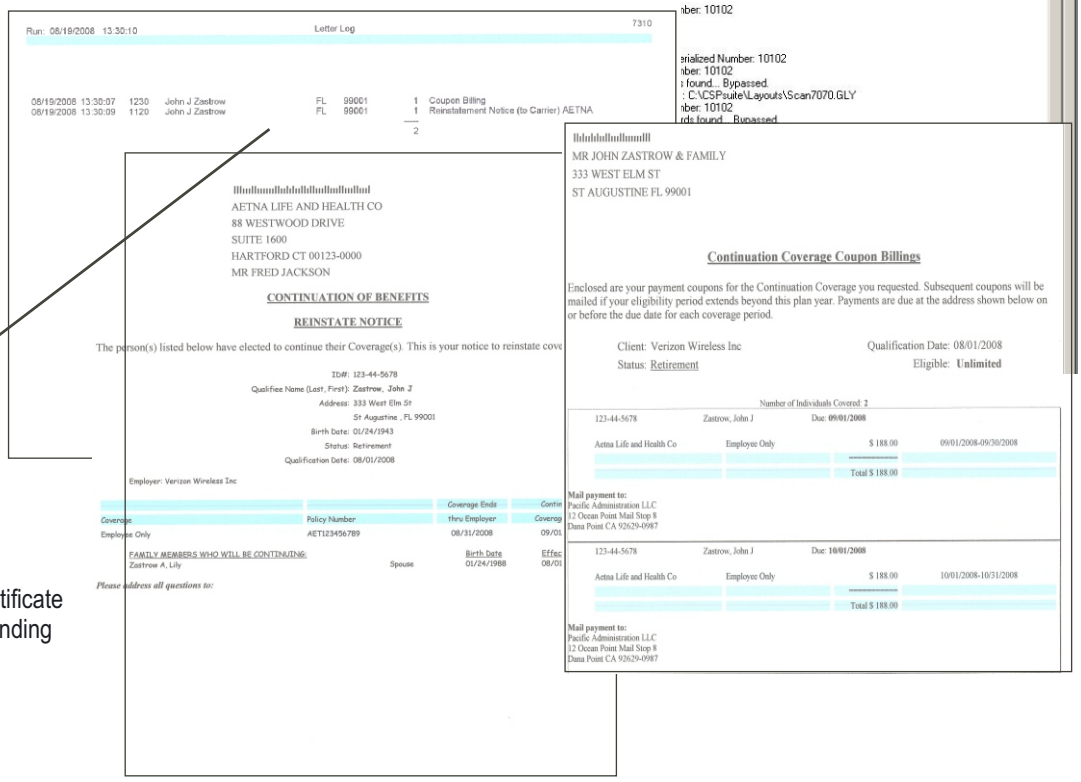
## Process Log

The processing log shows each step and all actions completed. Note that during this process a coupon billing and a reinstate notice to the carrier were output.




## Other Log Files

GIBS includes numerous other logs to provide a complete audit trail in the event proof of action might be required.

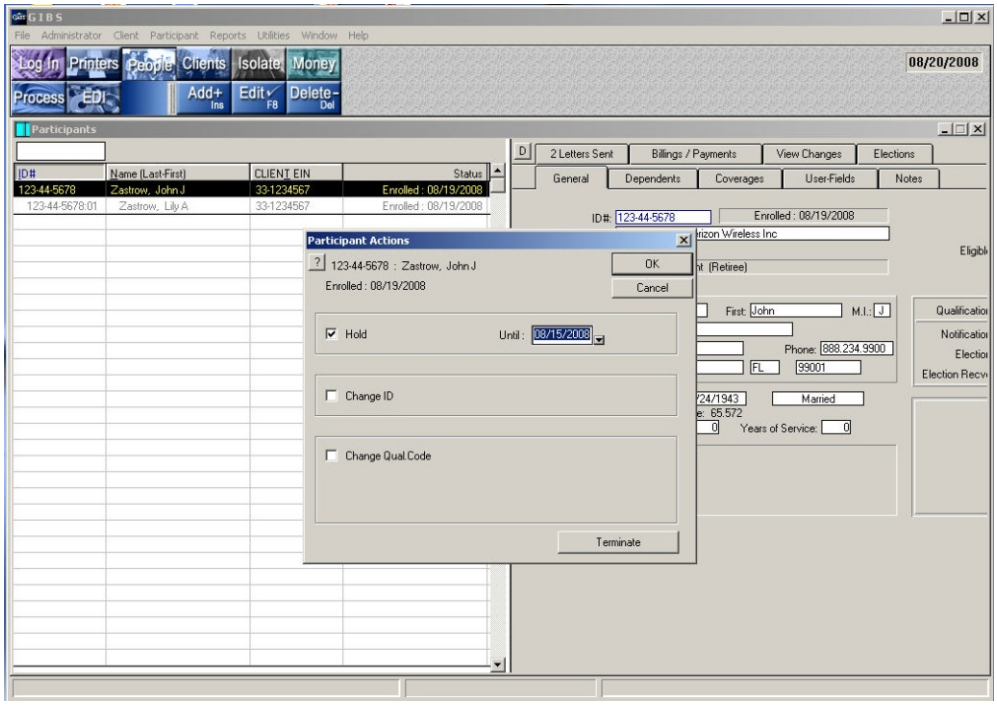



Letter Log — The Letter Log provides details on every letter or output during the proces

Certificate Of Mailing — Retain a copy of the Certificate of Mailing for proof of sending a notice or letter.

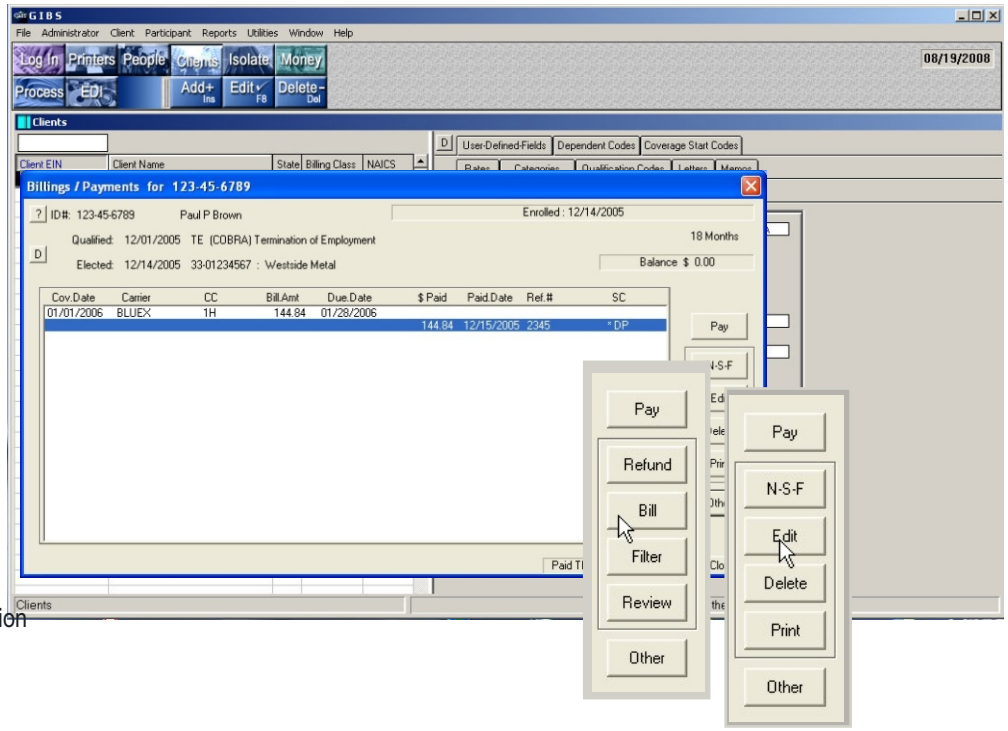
## On Hold Status

Often, you will find the need to put a participant in a "Hold" status until you get clarification or want to take some further action. The system lets you set a date on which the "Hold" will automatically be removed and further processing will continue.




## Billing/Payment Adjustments

In some competitor systems the only way to correct a billing or payment error is to delete the participant and payments - then re-enter both. GIBS recognizes that mistakes do happen and lets you easily correct any situation.



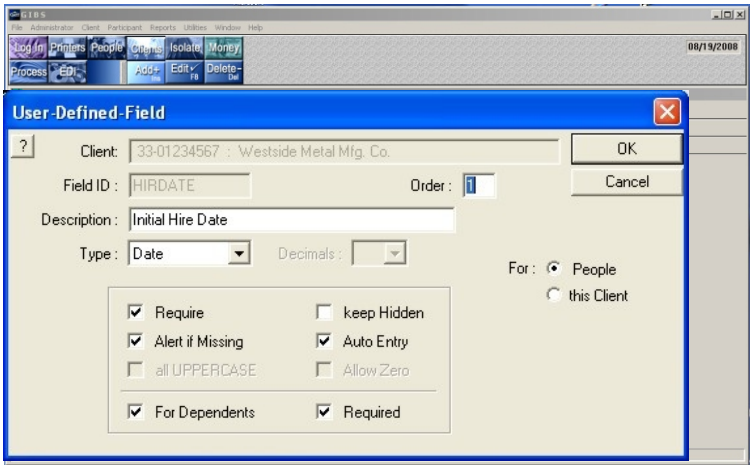

| | |
|---|---|
| Refund | Automatically refund posted amounts and generate a letter including the refund reason. |
| Manual Bill | Create a manual bill if you need to handle some special situation. |
| Retire Bill | Stop billing for an amount that may be uncollectible while maintaining an automatic audit trail. |
| Delete | Delete a billing or payment that was erroneously entered. The system automatically writes a detail note on this type of transaction to provide a complete audit trail. |

See the subsequent section on payments and billings for more money handling features.

## Add Your Own User Defined Fields

Create any number of Date, Character, Logical or Numeric fields to hold special data that may be required. You can add these fields to the regular entry screens.

There are an almost endless number of ways to use these special fields - from triggering special text to be included on specific letters if the Client or Person has a certain UDF assigned to just keeping special data that a certain client may want you to retain.

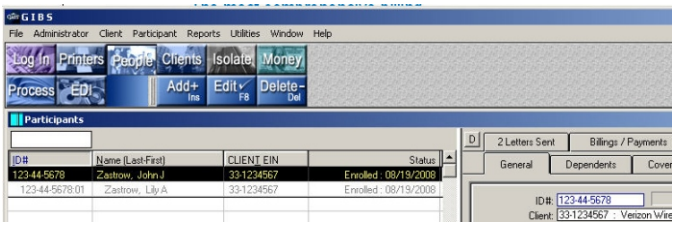


## The most comprehensive billing and payment posting features available in any direct bill software

### Create Bills & Post Payments

GIBS includes sophisticated premium handling features that make the money part easy. By client, choose from four billing methods:

1. Coupon Billing
2. Monthly Billing
3. All At Once Letter Bill
4. No Bill

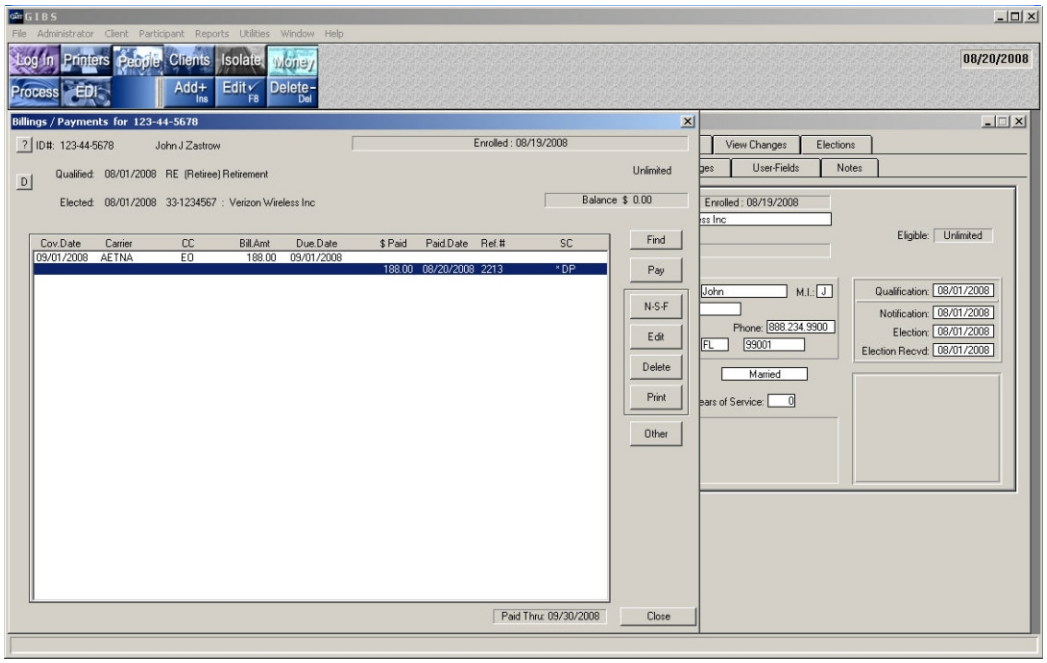



### Billings

The system creates a separate receivable for each coverage, for each period - payments are also specific to the coverage and period, providing a very accurate audit trail.

Some competing systems simply create all the bills due, then apply posted amounts to the last bill outstanding - giving you no way to later verify which payment was applied to which coverage and period.

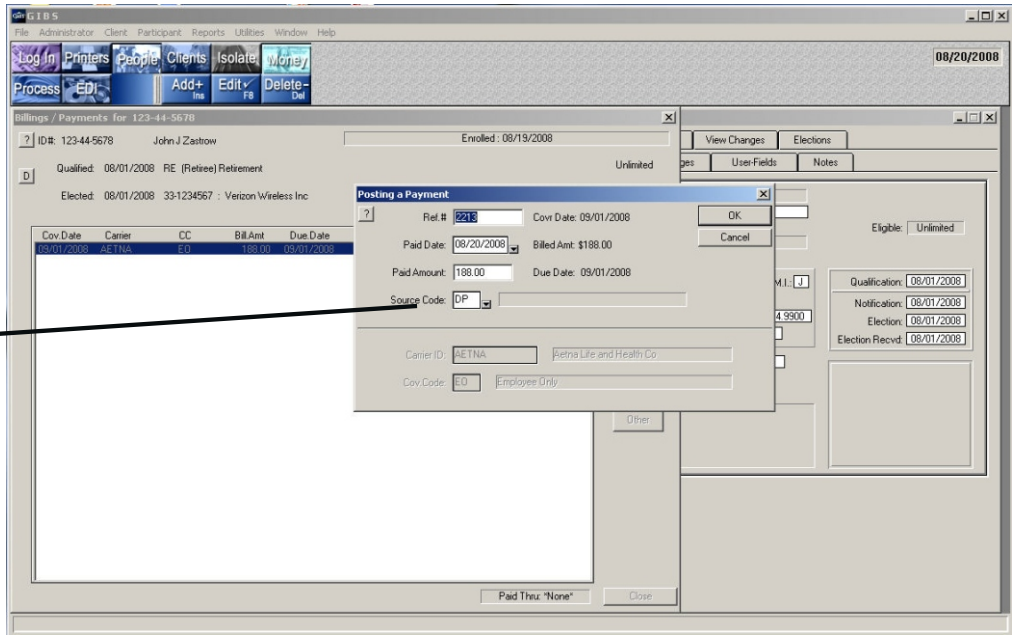
Billing periods can be defined in days, months, quarters, semi-annual or years.




### Payments

Payments can be posted individually or in a batch mode. The illustration on this page shows posting by individual. Batch mode posting is illustrated on the next page.

Note that the user can create a payment source code, in this illustration DP or Direct Pay to identify the source of each payment.

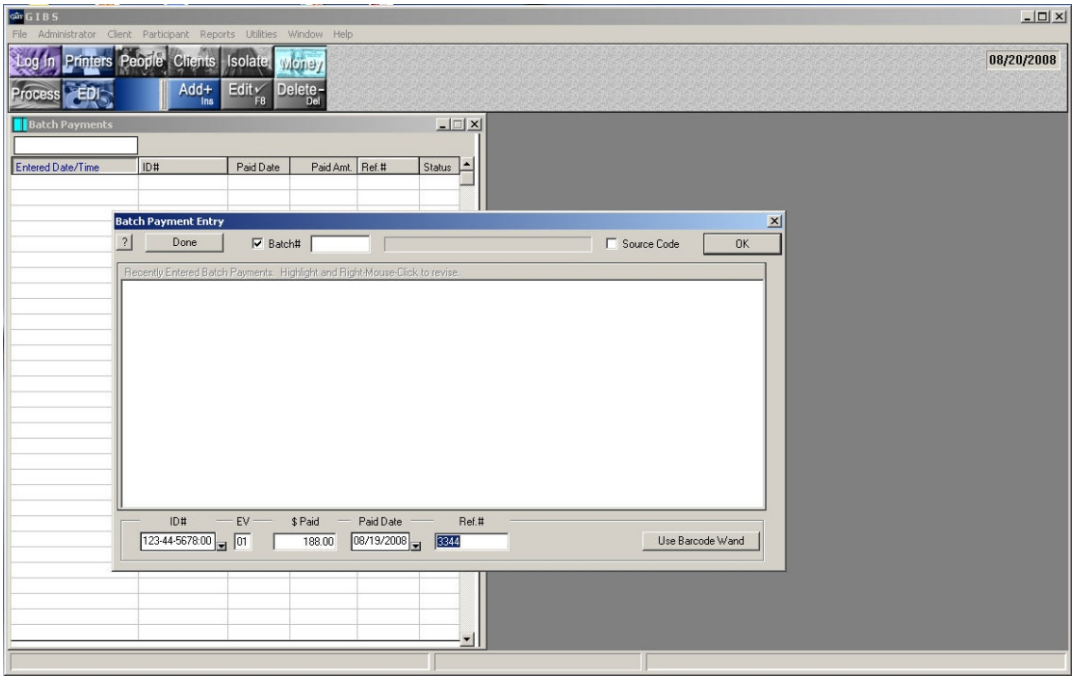



The system automatically handles NSF, advance, insignificant and significant under payments. Complete corrective features are provided that allow the user to easily correct payments that may have been erroneously entered. For example, when a payment was posted to the wrong coverage.

## Batch Mode Payments

Enter payments that meet system criteria using the batch mode process. Batch mode can handle the following payments:

1. Payment matches one billed amount;
2. Payment matches all amounts billed for one period;
3. Payment equals amount of all outstanding bills;
4. Payment equals amount of all outstanding bills for multiple periods.
5. When no billed amounts are outstanding the payment will post as an advance payment.



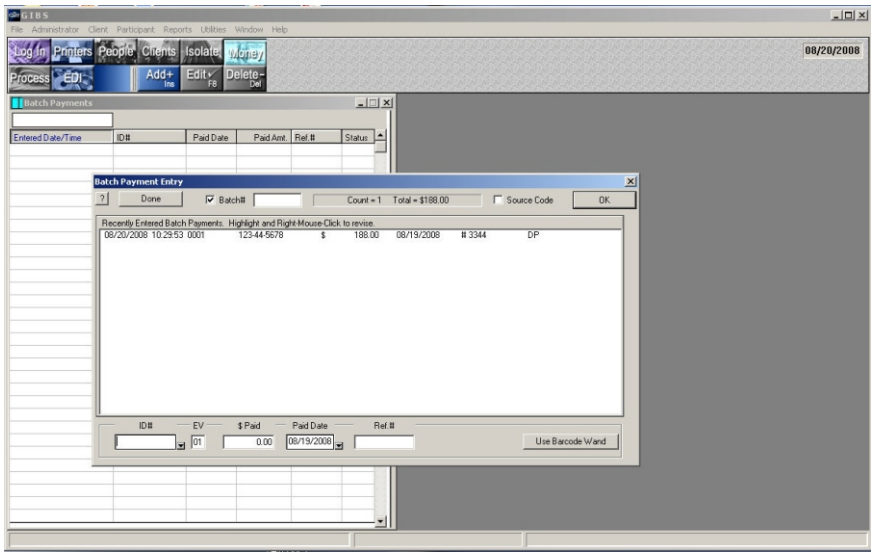

## Optional Bar Code Scanner

With the optional bar code scanner you can print a bar code on billing coupons - then scan payments into the batch file.

The reader attaches to your keyboard - then you scan the bar code with the pen scanner to automatically enter the payment data into the batch window.


## Import Batch Payments

Import ACH or other payment files.



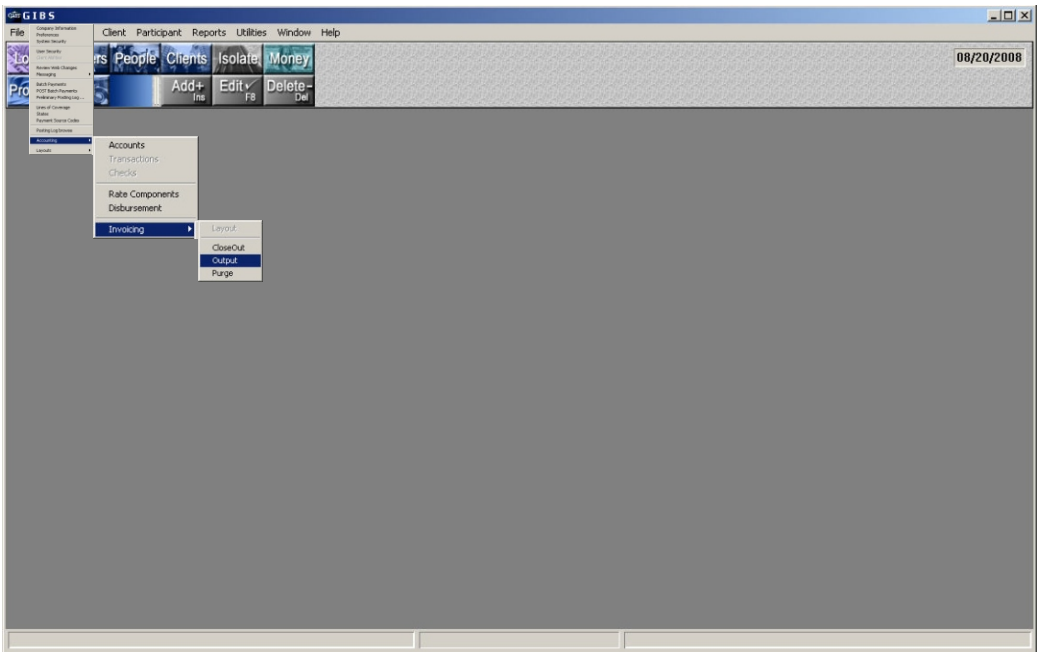
## Getting payments *into* the system is only half the job - you still need to disburse them *out* to clients, carriers or other accounts.

GIBS Administrator has the most functionality available in any system to automatically turn this normally *time consuming job* into an *ordinary task*.

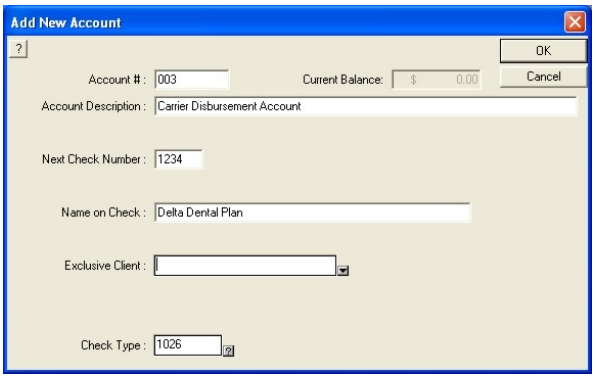
The Accounting module lets you set up client invoicing for your services and automatically disburse posted payments to multiple entities, even splitting a single posted premium into multiple parts for payment to multiple entities - providing very detailed audit reports, balancing everything to the penny.

For example, suppose that the Delta single premium of $22.00 from client ABC needs to be distributed like this:

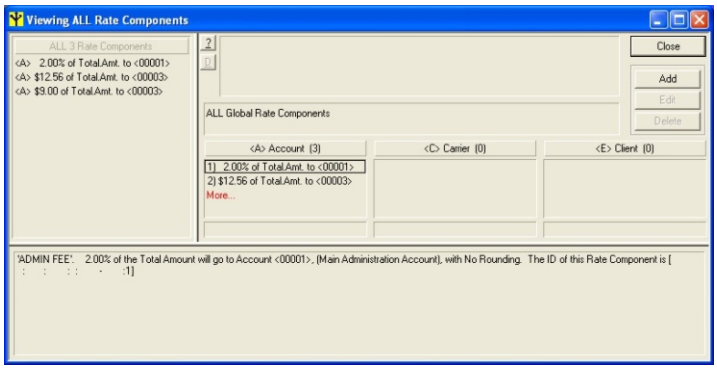
1. $9 to a stop loss carrier;
2. $12.56 to a claim account;
3. $.44 to your admin account.



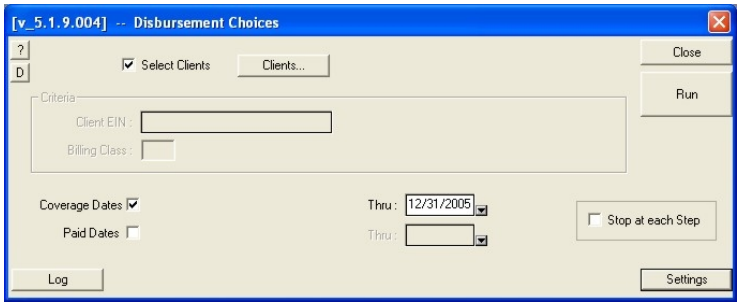

First, set up the 3 accounts...




Next, set up the components showing which parts of the rate to disburse to which entity. Using the example you will have three. 1. A flat $9 amount to the stop loss carrier, 2. A flat $12.56 to the claim account and the remaining 2% or .44 to your admin account.



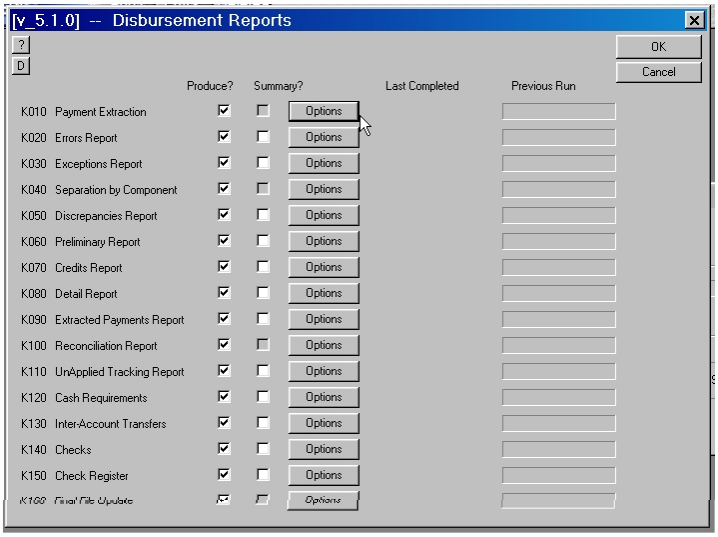

Then periodically run the disbursements process, normally once each month. The system sorts out which amounts should be paid to which entities, writes the checks and outputs the complete audit reports shown on the next page for distribution with the payments.

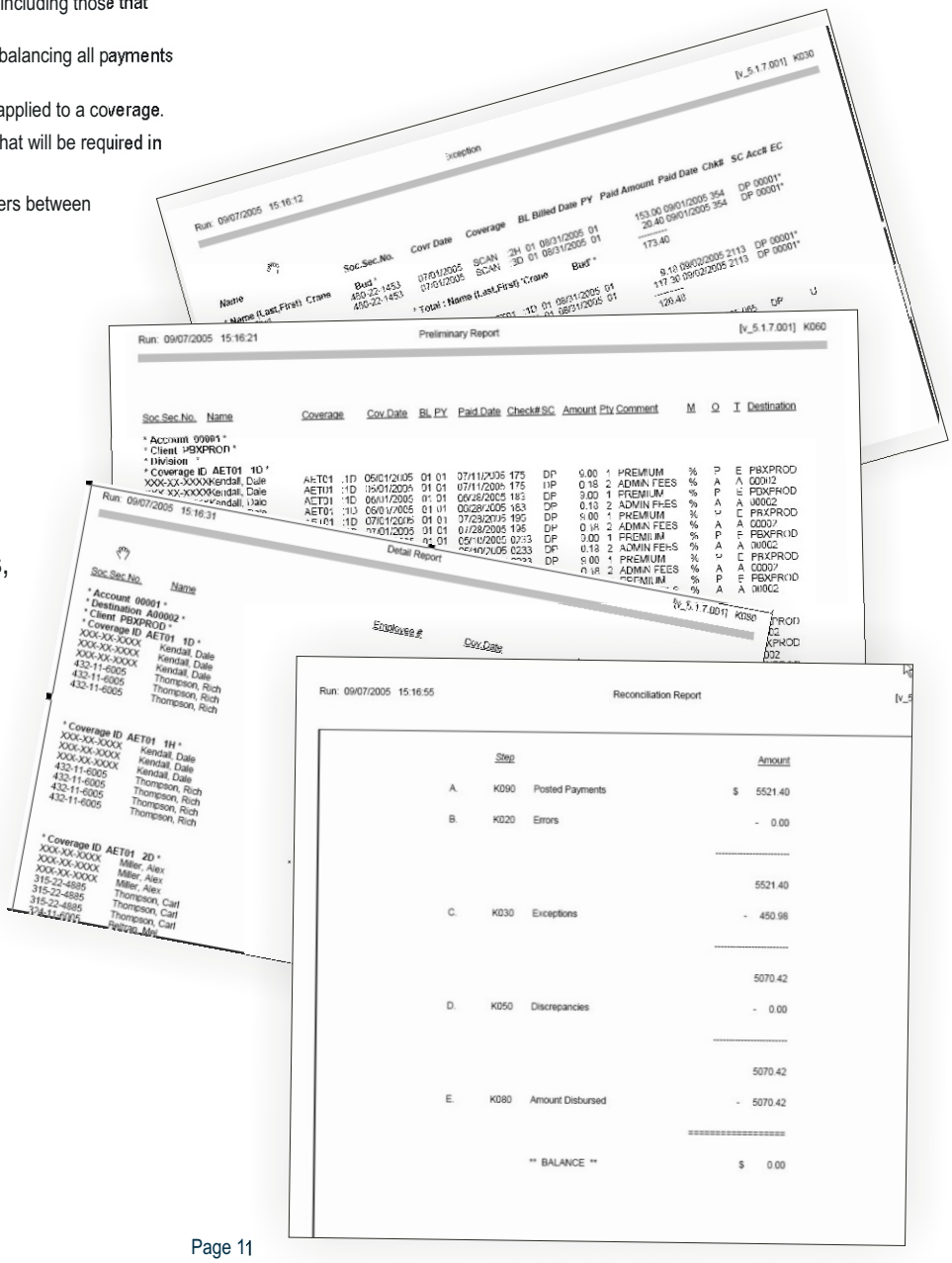


When the disbursement process is run the amounts are sorted out, detailed audit trail reports produced and the checks written to each applicable entity.

Disbursements are a very controlled, sixteen step process, handling retro-active amounts as well as current posted premiums.

1. K010 Payment Extraction Extracts all posted payments during the selected period that were not previously disbursed.
2. K020 Errors Report outputs a report of any payments that may have errors, such as a payment missing a client ID.
3. K030 Exceptions Report outputs detail about any payments that may be exceptions, such as a payment not yet processed..
4. K040 Separation By Component sorts out which amounts will be credited to which entity.
5. K050 Discrepancy Report shows any payments that cannot be disbursed such as a payment that does not have a valid rate component.
6. K060 Preliminary Report showing detail of payments that can be disbursed..
7. K070 Credits Report shows details of any credit amounts that will be in the disbursement.
8. K080 Detail Report of all payments that will be disbursed.
9. K090 Extracted Payments Report shows all payments, including those that will be disbursed and those that cannot be disbursed.
10. K100 Reconciliation Report shows all items reported, balancing all payments disbursed and those that cannot be disbursed.
11. K110 Unapplied Tracking Report shows amounts not applied to a coverage.
12. K120 Cash Requirements Report shows the amount that will be required in each account to meet disbursement totals.
13. K130 Inter Account Transfers makes any preset transfers between internal accounts.
14. K140 Check Printing.
15. K150 Check Register
16. Final File Update




The disbursement process fully automates distribution of all posted premiums, even when one premium must be distributed to multiple entities.

Detailed audit trail reports, balancing all posted and disbursed premiums to the penny are output for your clients and your internal audit trail.

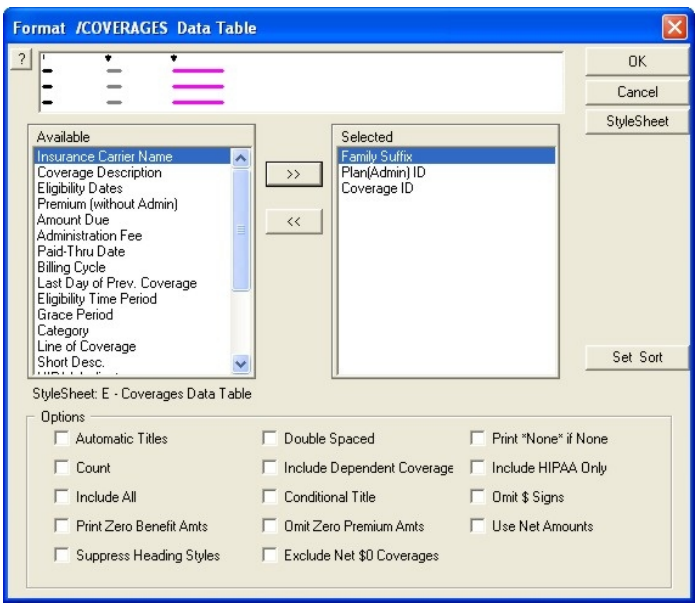
If you choose to output checks the system will output them using any check style.

Notices, Letters and Forms are a large part of Direct Bill administration - GIBS includes all of the functionality needed to modify correspondence to meet the most demanding client request.

Just point to the letter in the browse - then choose edit from the right button menu.

The RTF editor uses Notepad or Wordpad to let you make changes to any text.

You can embed fields, place customizable program data tables anywhere in the letter, use style sheets, include graphics and even add special text when certain conditions exist - for example, include additional text if the participant lives in a certain state or is a union employee.



GIBS automatically outputs all required Notices, Forms and Letters, based on the data in your file when you process, eliminating the need for manual logs, remembering when an item should be done or worrying about whether or not you completed some required action. The list below shows all of the letters in the system for the Retiree Category.

Letters

| Category | CLIENT EIN | Ltr.# | Description |
|---|---|---|---|
| Retiree | | 1000 | Open Enrollment Notice |
| Retiree | | 1001 | Missing Information Letter (with NOTE) |
| Retiree | | 1008 | HIPAA Notice |
| Retiree | | 1021 | Medicare Part D Notice (Creditable) |
| Retiree | | 1022 | Medicare Part D Notice (NON-Creditable) |
| Retiree | | 1100 | Coverage Fact Sheet |
| Retiree | | 111R | Retiree Notification |
| Retiree | | 1120 | Reinstatement Notice |
| Retiree | | 1170 | Certificate of Coverage |
| Retiree | | 1172 | Alternative Coverage Form |
| Retiree | | 1205 | Adjustment & Manual Billing |
| Retiree | | 1210 | Confirmation of Election Received |
| Retiree | | 1220 | Periodic On-Going Billing |
| Retiree | | 1230 | Coupon Billing |
| Retiree | | 1240 | All-at-Once Billing |
| Retiree | | 1250 | Credit Notice |
| Retiree | | 1252 | Refunded Payment Letter |
| Retiree | | 1310 | Expiration Of Election Period Letter |
| Retiree | | 1315 | Coverage Election Expiration Notice |
| Retiree | | 1320 | Coverage Termination Notice (Non-Payment) |
| Retiree | | 1328 | End of Eligibility Termination Notice |
| Retiree | | 1330 | Participant Termination Notices |
| Retiree | | 1340 | Loss-of-Coverage Notice |
| Retiree | | 1350 | Dependent Termination Notice |
| Retiree | | 1380 | Approaching End of Elig. Conversion Notice |
| Retiree | | 1410 | Non-Sufficient-Funds Notice |
| Retiree | | 1420 | Grace Period Letter |
| Retiree | | 1430 | Partial Payment Received Courtesy Notice |
| Retiree | | 1440 | Partial Payment Extension Notice |
| Retiree | | 1510 | Qualification Date Change Notice |
| Retiree | | 1515 | Qualification Code Change Notice |
| Retiree | | 1520 | Salary Change Notice |
| Retiree | | 1525 | 'Class' Change Notice |
| Retiree | | 1527 | Years-of-Service Change Notice |
| Retiree | | 1530 | New Rate Change Notification |
| Retiree | | 1570 | Coverage Change Notice |
| Retiree | | 1910 | On-Line Inquiries |
| Retiree | | 1920 | Printing Participant Statement |
| Retiree | | 1980 | Applicant Non-Response Termination File Information Sheet |

In addition, the system includes another 31 letters and notices that are used when the event is Family Medical Leave. You can also create any number of new notices, forms or letters - then use them for a specific client or group of clients.

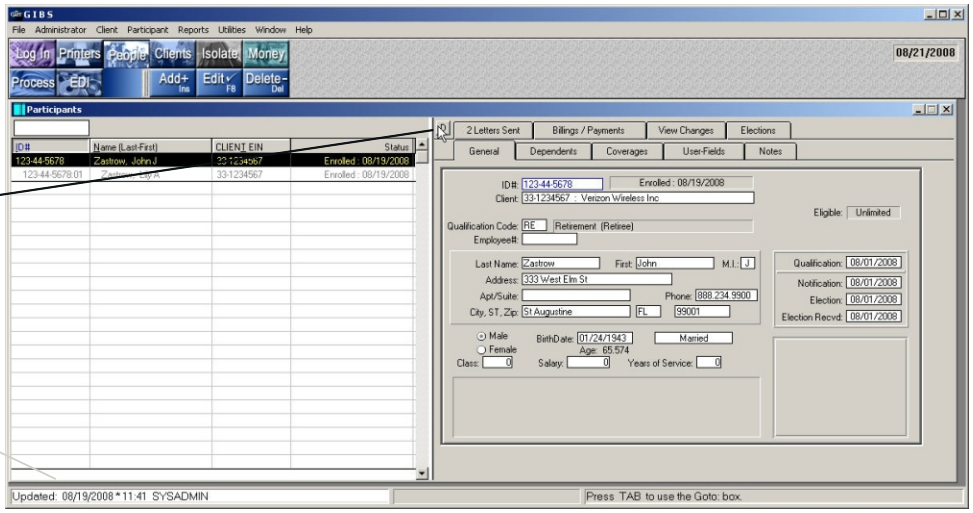
Some of the most extensive features of the system are those we hope that you will never use - permanent records of every action completed, every letter output, history and archiving.

Features that will provide the proof needed to withstand any challenge in the event that your administration practices are the subject of a lawsuit.

## Operator Tracking

The audit trail starts with full tracking of all operator activity. To see *who* made the last change to a record and *when* it was made just click on the D-details button on each screen.

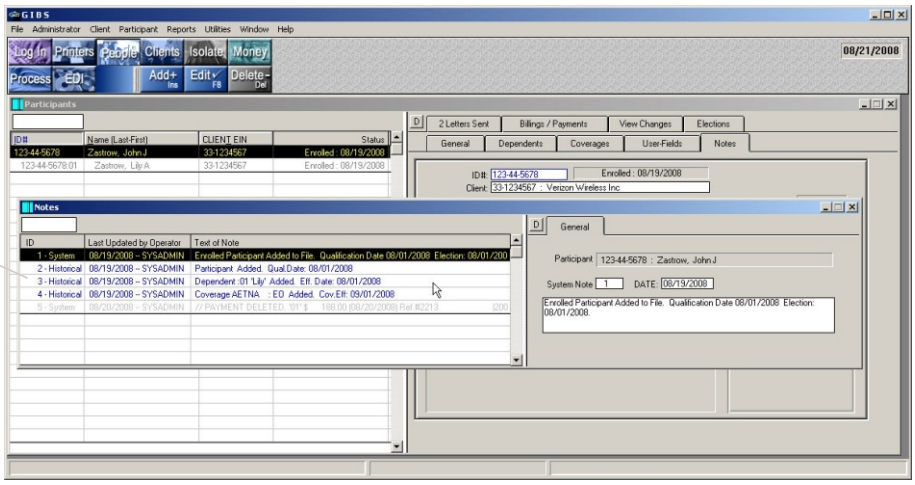
Then view the details at the bottom of the window.




## Permanent Notes

For more detail just choose NOTES from the right button menu to see a permanent record of all significant actions.

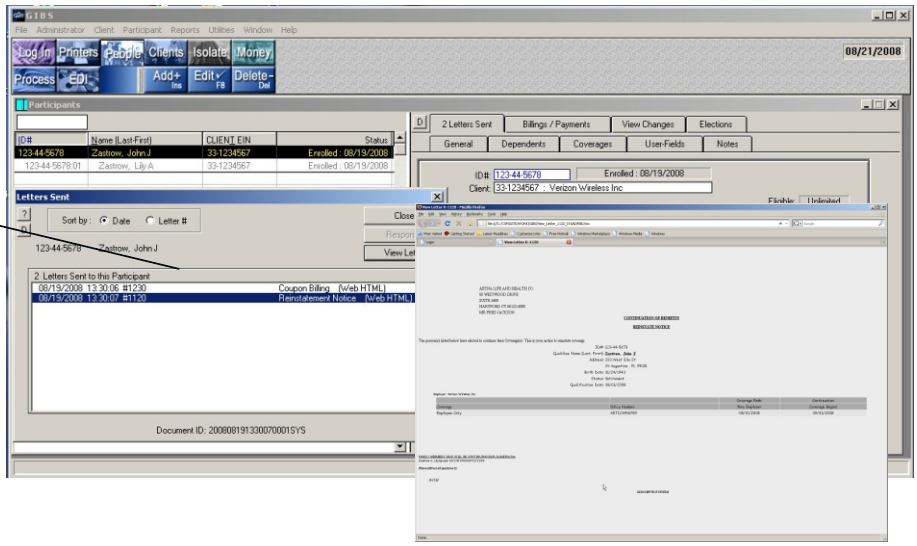
The system automatically keeps permanent notes that cannot be changed. The user can also write special notes that can only be changed by the person who created the note.




## Letter Archiving

All letters are imaged just as they were originally output. Click on the View Letters tab to see all letters output for any participant. You can point to the letter to view it or reprint the letter at any time.

Letters can be permanently archived to CD, Tape or other storage media. A built-in search function is provided to let you find any archived letter by name, ID or client. **Instead of keeping volumes of paper records you maintain only the imaged copies.**

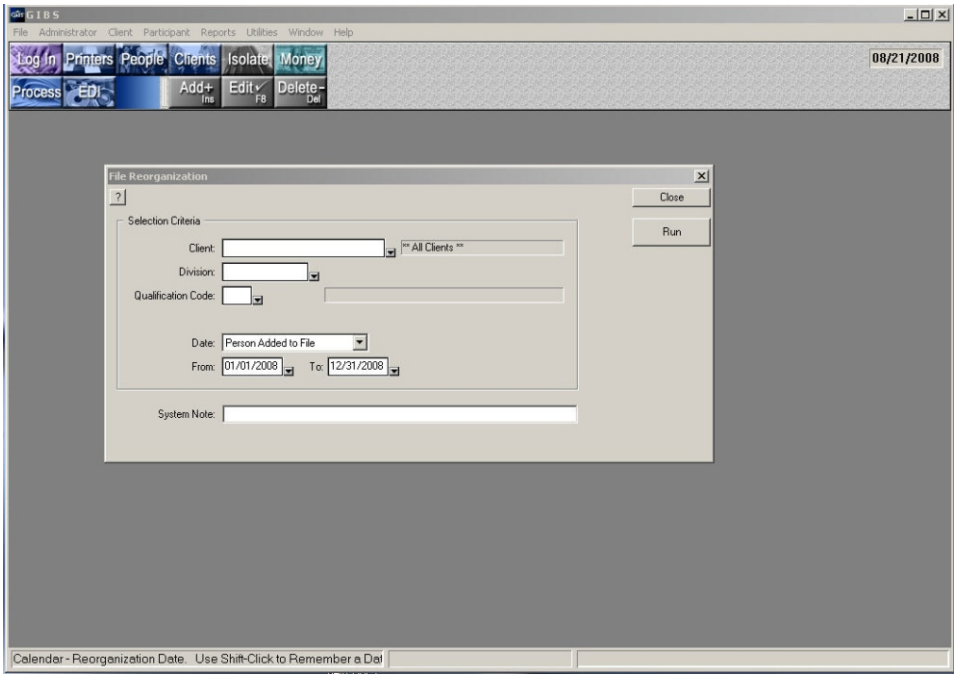


Your ability to save and recall a complete history of all actions is critical to success in a court of law. While some of our competitors don't have any history functionality - others simply remove data but don't provide any way for you to ever use it again. GIBS lets you view, recall or report on history at any time.

## Reorganization

The REORG utility lets you transfer records that are no longer active to a separate history file in an orderly way.

The REORG can be done by client, division, qualification code or by date range.

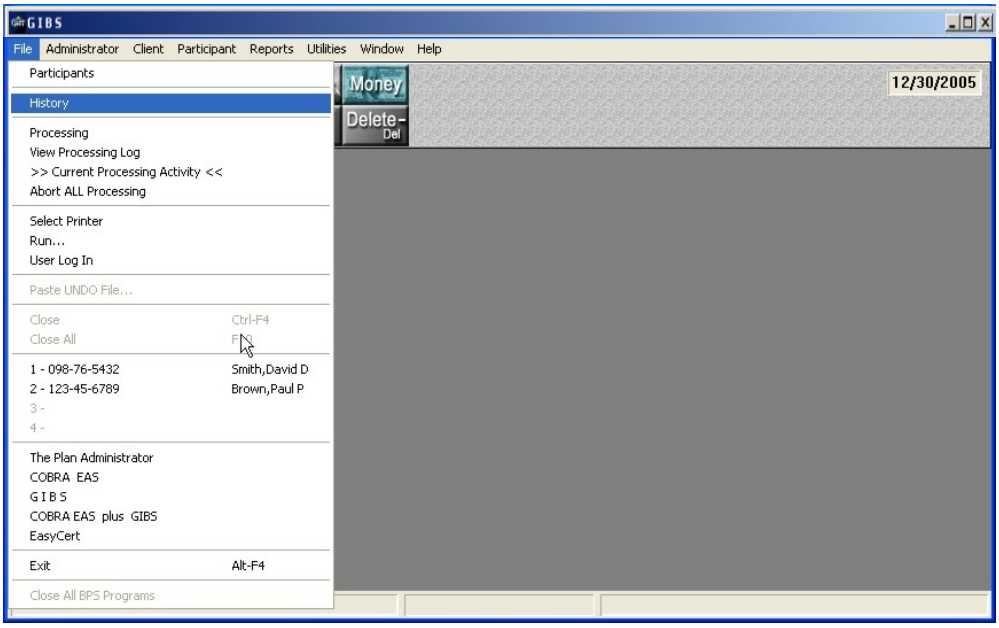



## History

Just select History from the File Menu to use History in place of the active file at any time.

You can view any history record or run reports on the file. History records cannot be edited while using the file.

You can recall a participant record from history to the active file and edit it - however, an audit trail note record will then be created for all actions on the record.



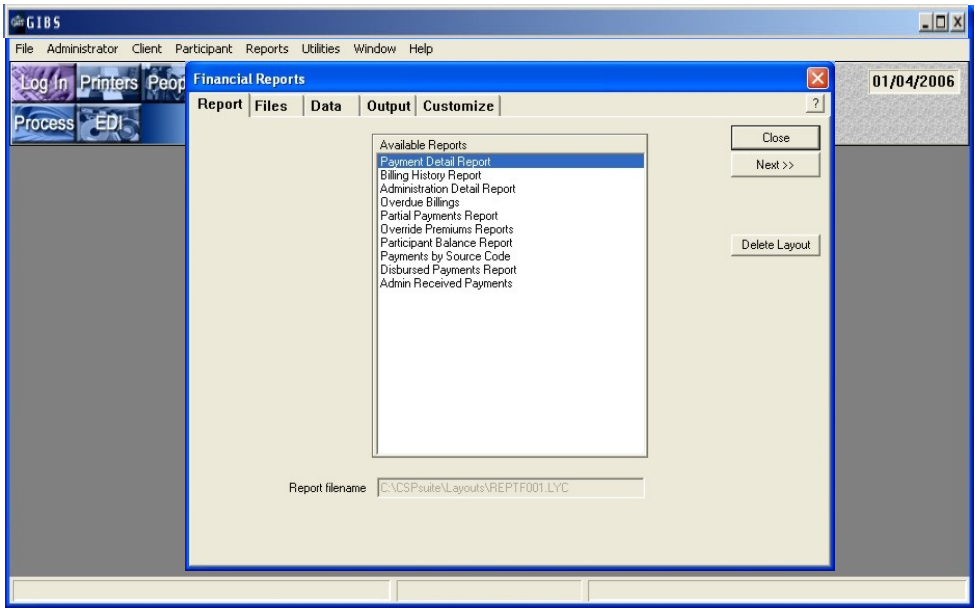

## History Files

The history file includes all participant, dependents, coverages, billings, payments, separate elections, notes and all letters sent. It's a complete audit trail record of every action taken during the time the person was in the active file, accessible at any time.

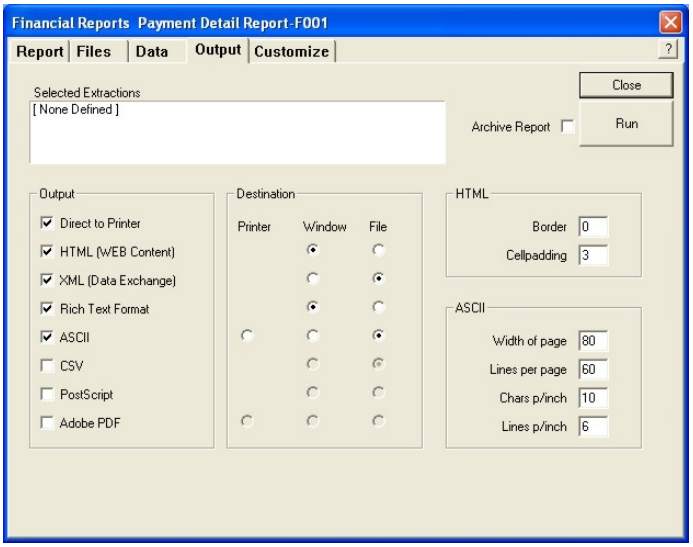
GIBS includes an extensive reports capability. The system includes over 45 prepared reports, allowing you to output data selecting time frames, filters and other extract criteria. You also have the ability to create a "set" of reports that you regularly produce - then simply run all of the reports that you include in the "set" as a group.

When our prepared reports do not meet your need you can create your own custom reports, with your selected files, fields, sorts and detail groupings using the new report functionality.

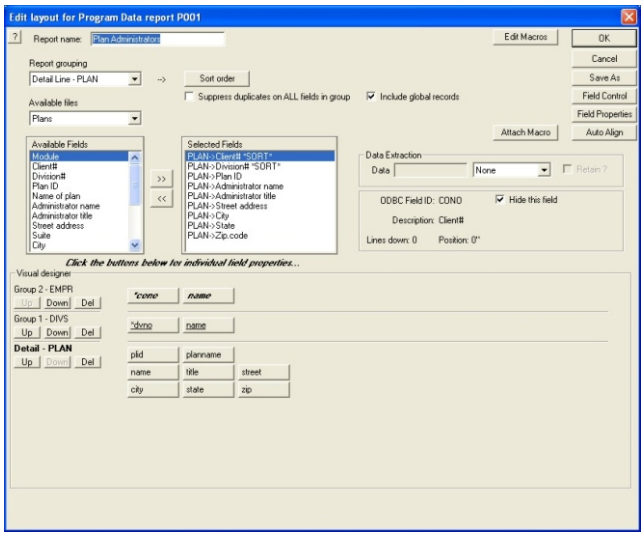
Just choose to output a financial, qualified person or program data report - select active or history file - select the report - type of output - then click on RUN.




Reports can be output to your printer, screen or a file, as HTML, XML, Rich Text or ASCII.




Use the custom report writer to create completely new reports including data from any applicable file or field in the program data dictionary.



# Sample Reports

F001 Payment Detail Report output to printer

Report F001: Run on 01/04/2006 at 10:11:33

## Payment Detail Report

| Soc.Sec.No | Name | | Employee# | Covg Date | Paid Date | Paid | Check # | Source Code |
|---|---|---|---|---|---|---|---|---|
| **PROV003 - Providence Health Plans** | | | | | | | | |
| Cov:1D | | | | | | | | |
| 123-44-9004:00 | Jenkins | Paul | | 07/01/2005 | 07/15/2005 | $ 10.20 | 1332 | DP |
| | Jenkins | Paul | | 08/01/2005 | 08/25/2005 | $ 10.20 | 1356 | DP |
| Cov:1H | | | | | | | | |
| 123-44-9004:00 | Jenkins | Paul | | 07/01/2005 | 07/15/2005 | $ 91.80 | 1332 | DP |
| | Jenkins | Paul | | 08/01/2005 | 08/25/2005 | $ 91.80 | 1356 | DP |
| | | | | | | **$ 204.00 Coverages** | | |
| **MAXI001 - MaxiCare HMO Plans** | | | | | | | | |
| Cov:1D | | | | | | | | |
| 187-33-2997:00 | Smithson | Edward | E21496 | 06/01/2004 | 02/23/2004 | $ 8.16 | 614 | DP |
| | Smithson | Edward | E21496 | 07/01/2004 | 02/23/2004 | $ 8.16 | 614 | DP |
| | Smithson | Edward | E21496 | 08/01/2004 | 02/23/2004 | $ 8.16 | 614 | DP |
| | Smithson | Edward | E21496 | 09/01/2004 | 08/15/2004 | $ 8.16 | 824 | DP |
| | Smithson | Edward | E21496 | 10/01/2004 | 08/15/2004 | $ 8.16 | 824 | DP |
| | Smithson | Edward | E21496 | 11/01/2004 | 08/15/2004 | $ 8.16 | 824 | DP |

P004 Rate Detail Report output to HTML

Report P004 - Microsoft Internet Explorer

Address C:\CSPsuite\Reports\P004_SYS.htm

Report P004: Run on 01/04/2006 at 09:50:07

## Rate Details

| Division# | Carrier id | Eff start date | Eff end date | Rate | Admin fee |
|---|---|---|---|---|---|
| **33-01234567 Westside Metal Mfg. Co.** | | | | | |
| | BLUEX | 01/01/2006 | 12/31/2006 | $ 142.00 | 2.0000 $ 0.00 |
| | | 01/01/2005 | 12/31/2005 | $ 125.00 | 2.0000 $ 0.00 |
| | DELTA001 | 01/01/2006 | 12/31/2006 | $ 16.90 | 2.0000 $ 0.00 |
| | | 01/01/2006 | 12/31/2006 | $ 29.00 | 2.0000 $ 0.00 |

*For further information contact....*
*Benefit Service Corporation*
*622 East Financial Way*
*Suite 600*
*Lincoln NB 02344-0987*
*607 211 1212*
*Internet:@bsc.com*

GIBS has an extensive Import/Export capability, allowing you to easily exchange data with any other system.

Just click on the Electronic Data Interchange button to open the EDI program.

We include all of the tools needed for you to import any ascii, csv, composite or MS Excel file.

Maintain a catalog of layouts that you can recall as needed.

Select which fields to import/export from the drop down list.

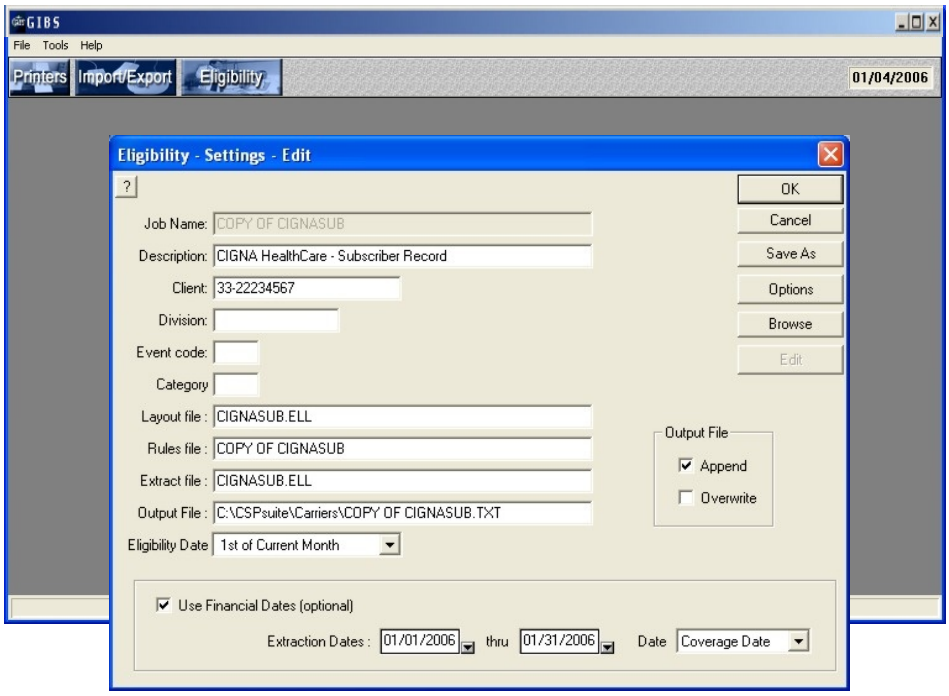
Add any translation tables that may be needed.

Select special parameters and options - then run your layout as a test - when it's correct simply run.

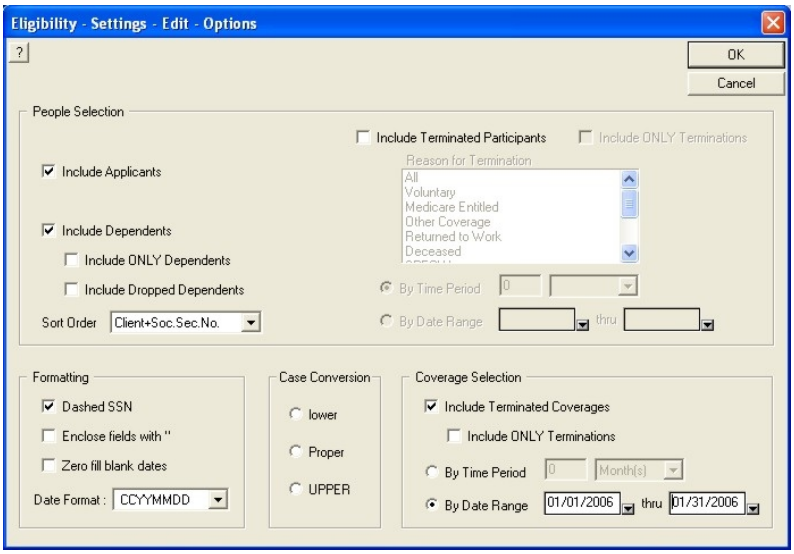
A special scripting capability lets you schedule layouts to run unattended at set times and dates.

# Reporting Eligibility

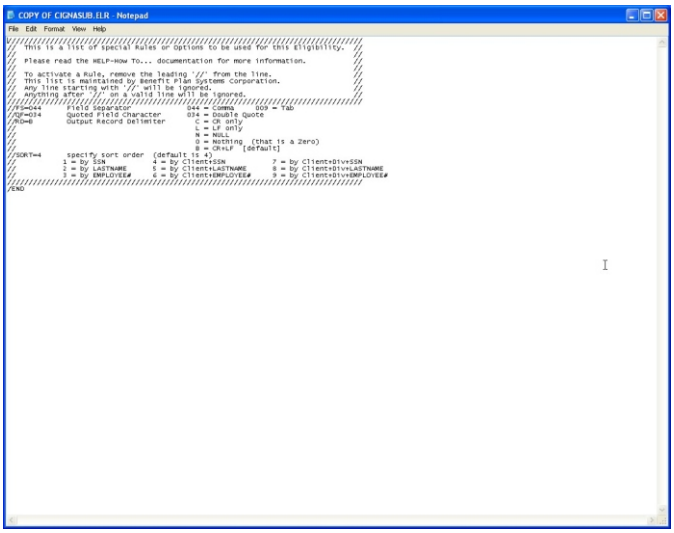
Report eligibility electronically to any insurance company in any format. Use the system tools to create a layout file - then just recall the layout to output the current file.




Use the option selections to customize the data required.




Create translation and rules tables to meet any special requirements.



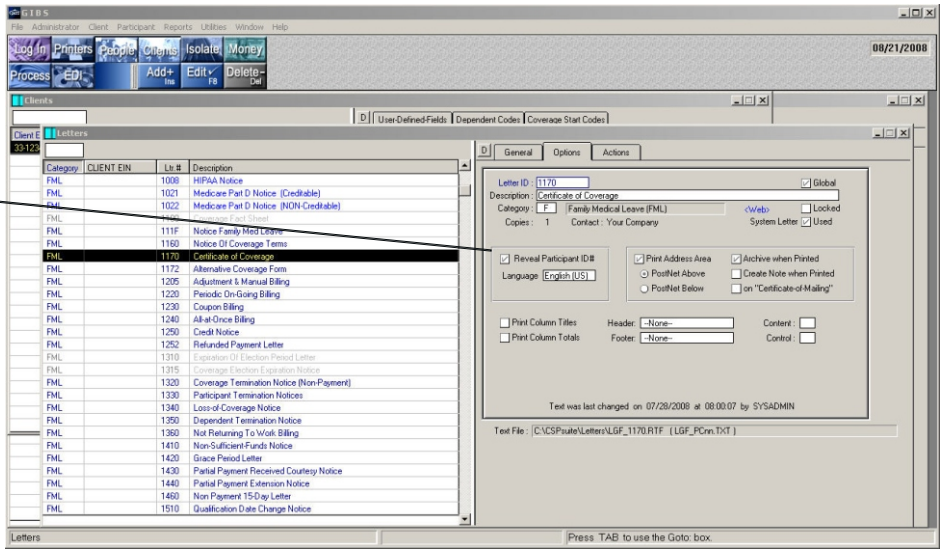
GIBS includes very complete archiving functionality that will let you move from paper to paperless storage of all letters, notices and reports produced by the system.

## How It Works

User selects which letters and/or reports to permanently archive.

Just before documents are printed an exact duplicate is placed in the archive file.

When you are ready to archive items for long term storage just follow the 3 easy steps below to electronically retain all selected items.




1

Identify which data to archive by client, time period or other parameters.

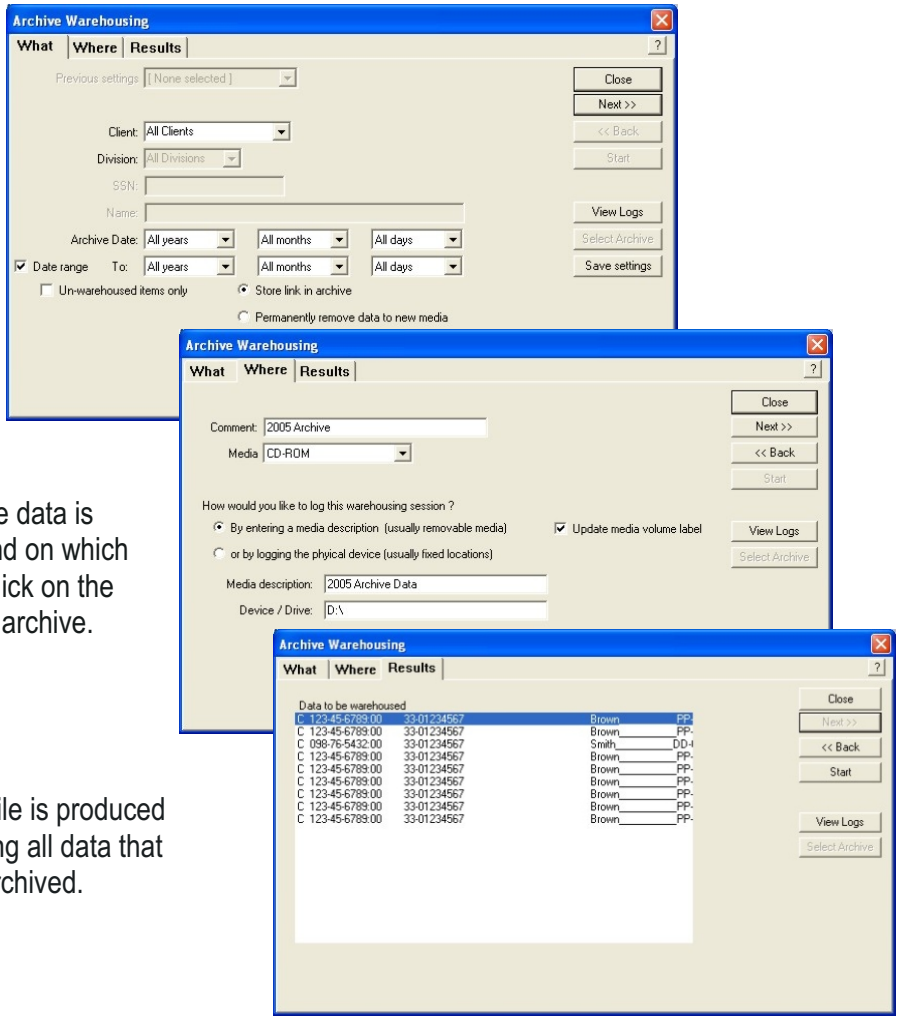
System automatically will create an index so that data can be easily found later.

2

Identify where the data is to be archived and on which type of media - click on the START button to archive.

3

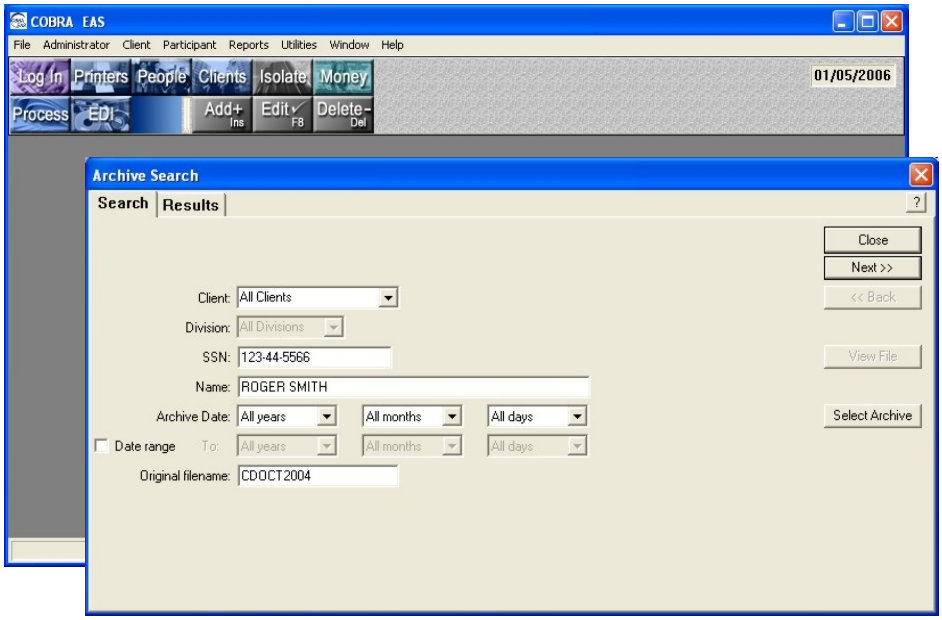
A log file is produced showing all data that was archived.



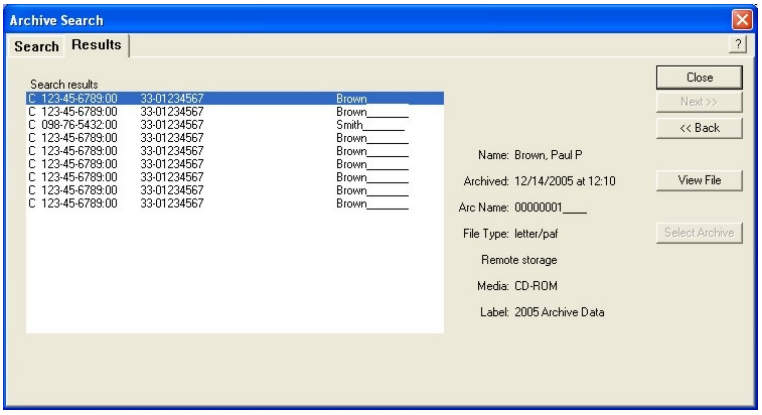
# Locating Archived Data

Find archived documents fast using the built-in archive search function.

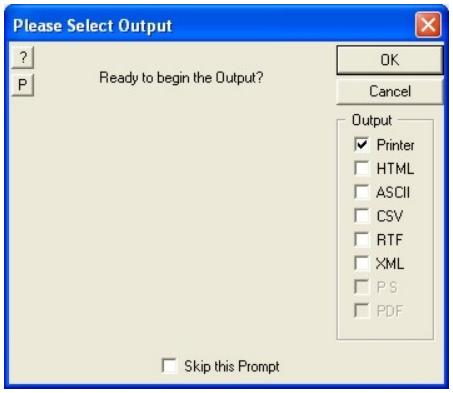
Search by client, participant ID, Name, date range or division. The index will tell you where the data is stored.




Insert the storage media, point to the desired document, click view.




To reproduce it simply select desired output and click OK.



We can put your Direct Bill business on the web in about 2 hours!

CSPWeb lets you handle more clients without increasing costs


CSPWeb provides anytime access from anywhere to any CSP Suite application, including COBRA EAS, GIBS, EasyCert and The Plan Administrator through any computer with an internet connection and a browser.

## Advantages

- Your clients, brokers and other authorized parties can enter new participants into the system, reducing labor costs and allowing you to offer up to date service options at the most competitive cost.
- Plan participants can view their payments, coverage, dependents and other data, reducing customer service calls.
- Your data stays on your server, always under your control.
- You control who can access what data.
- There are no "per person" or other monthly fees charged for using CSPWeb.

## Security

- CSPWeb includes the latest 128 bit encryption technology to assure that data will not be compromised. While a certain amount of rish is inherent in any internet exchange of data all currently available safeguards are included.
- Secured Socket Layer certificate technology is utilized.
- Automatic logging is always maintained to give you a complete record of who logged in, time and date.
- System limits retry attempts to 3 - automatically shutting out user for 5 minutes after 3 failed attempts.
- An "adverse event" log is automatically maintained, keeping you informed of unusual activity.
- Log in requires both a 4-11 character User ID and a 4-11 character password.
- The administrator has full control over which type of user can access which functions.

## Easy To Use

Special care was taken to make the CSPWeb user interface as simple and easy to use as possible. It has been "user tested" to assure that virtually any user can perform all functions without any written instruction.

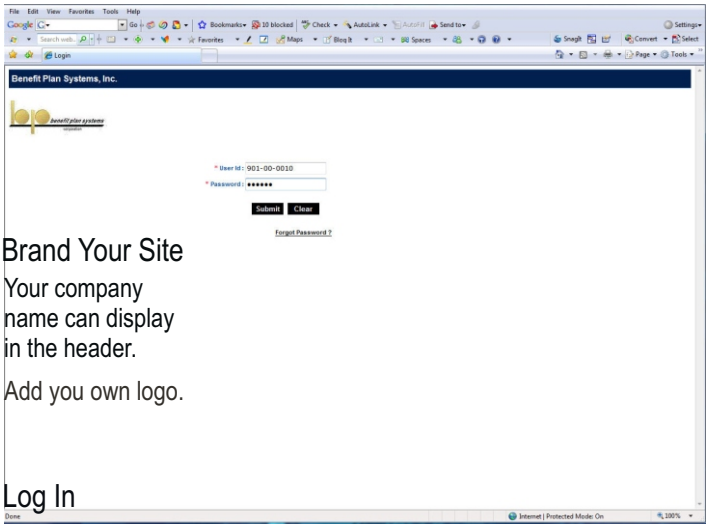
- All functions are available from a user friendly navigation panel.
- Where special formats are required, such as for dates, a sample format is displayed.
- Wizards are utilized for functions such as adding a new participant to insure that all data will be complete and correct.
- Simple error messages are provided when entered data is not correct or complete.

## Easy To Set Up

- CSPWeb is installed on your own server. The setup is completed using an install that automatically configures the system, with you providing only the locations of the various components.
- The setup process is designed so that people with limited hands on server experience can successfully complete it.

## Illustrations

The illustrations below and on the other side of this page are actual screen shots of CSPWeb.



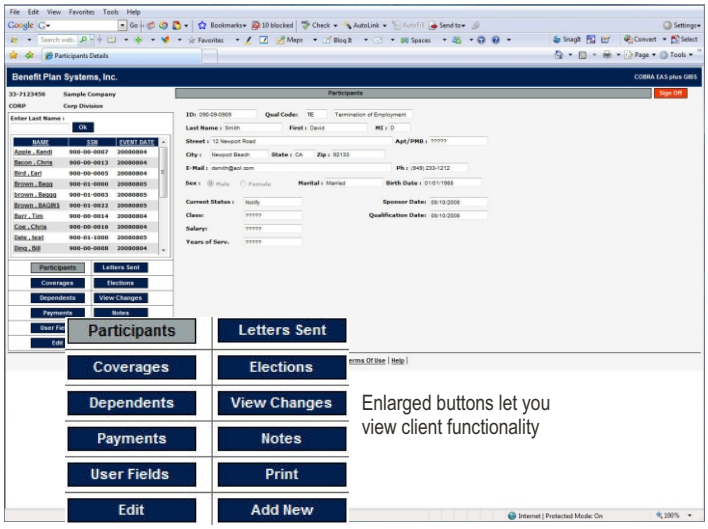

### Brand Your Site

Your company name can display in the header.

Add you own logo.

### Log In

The User ID and Password identify the type of user and functionality that can be accessed. Four levels are provided - Administrator, Broker, Client or Participant. A participant can be limited to viewing data and requesting an edit, while a client can add new participants and view any of their own participant data.

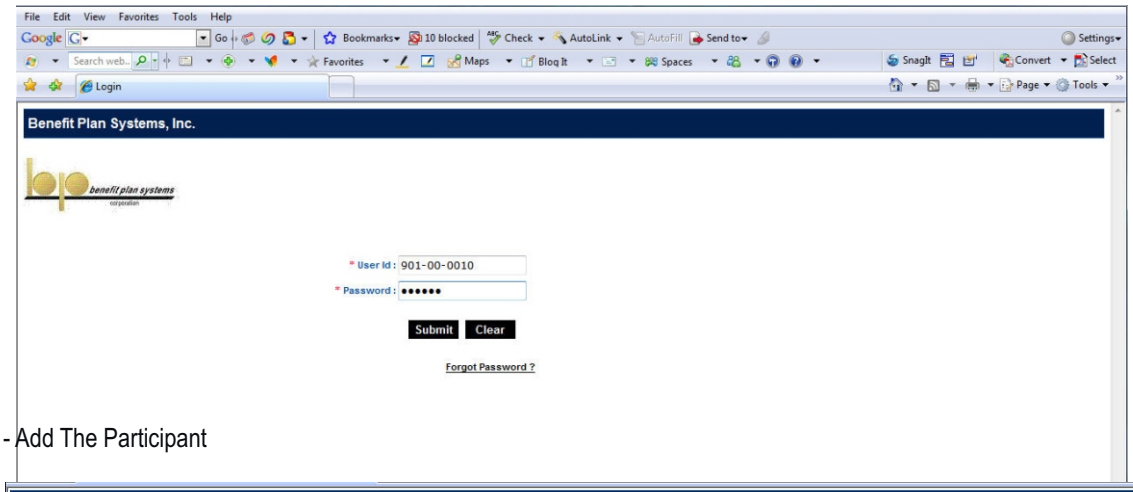



Enlarged buttons let you view client functionality

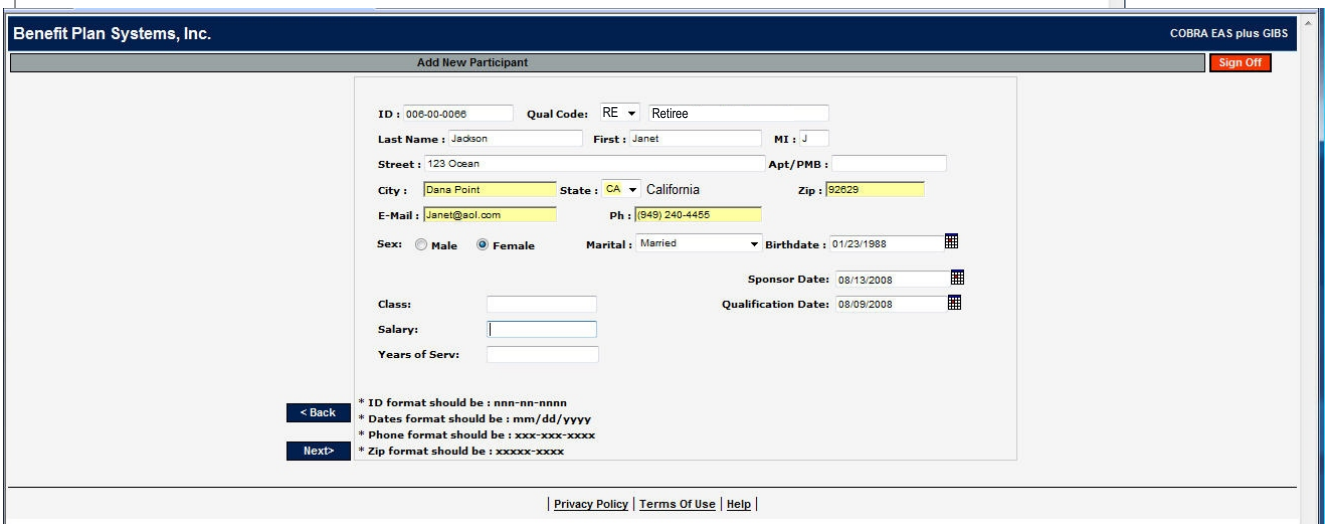
## Add New Retiree Participant

The illustrations below show you all required steps for a broker or client to add a new retiree participant using CPSWeb.

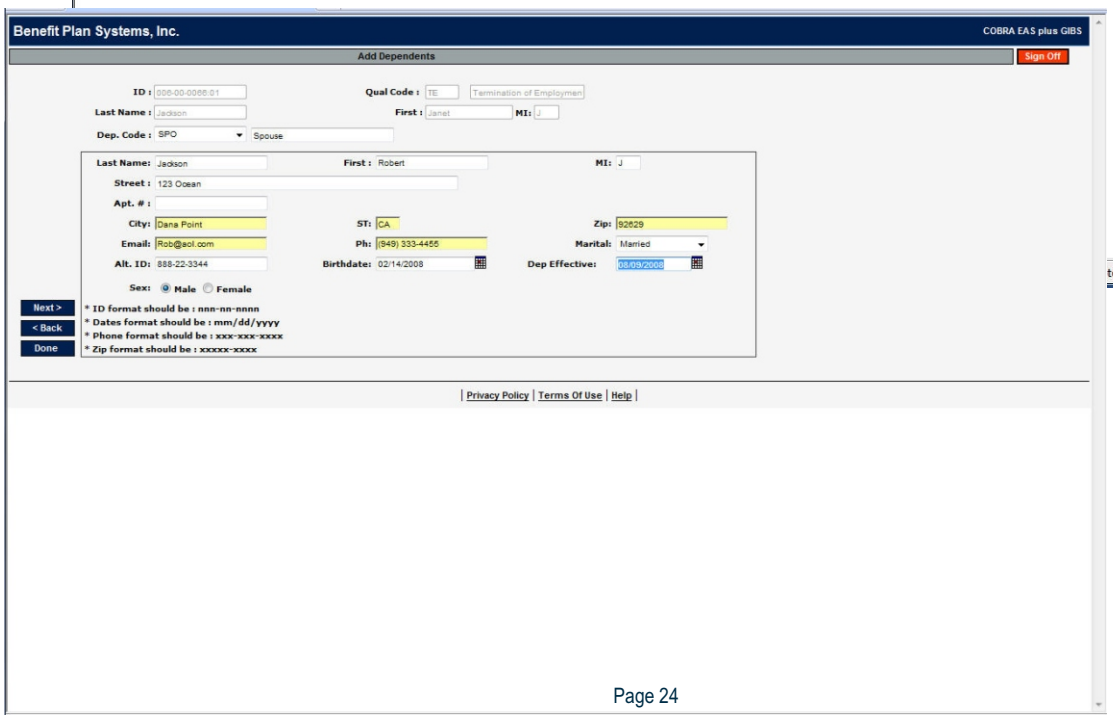
Step 1 - Log In




Step 2 - Add The Participant




Step 3 - Add Any Dependents



Step4 - Add Plans

Benefit Plan Systems, Inc. COBRA EAS plus GIBS

Add Coverage Sign Off

ID : 006-00-0066:00 Qual Code: TE Termination of Employment

Last Name : Jackson First : Janet MI : J

Please select coverages for this participant

| Select | Carrier | Name | Code | Description |
|---|---|---|---|---|
| ☐ | AHC | Aetna U.S. Healthcare | 1H | Employee Only |
| ☑ | AHC | Aetna U.S. Healthcare | 2H | Employee plus 1 |
| ☐ | AHC | Aetna U.S. Healthcare | 3H | Employee plus 2 |
| ☐ | AHC | Aetna U.S. Healthcare | 4H | Employee Family |
| ☐ | DEL | Delta Dental | 1D | Employee Only |
| ☑ | DEL | Delta Dental | 2D | Employee plus 1 |
| ☐ | DEL | Delta Dental | 3D | Employee plus 2 |
| ☐ | DEL | Delta Dental | 4D | Employee Family |
| ☐ | METLIFE | MetLife | 1L | Employee Only |
| ☐ | METLIFE | MetLife | 2L | Employee plus 1 |
| ☐ | METLIFE | MetLife | 3L | Employee plus 2 |
| ☐ | METLIFE | MetLife | 4L | Employee Family |
| ☐ | VSP | Vision Service Plan Insurance | 1V | Employee Only |
| ☐ | VSP | Vision Service Plan Insurance | 2V | Employee plus 1 |
| ☐ | VSP | Vision Service Plan Insurance | 3V | Employee plus 2 |
| ☐ | VSP | Vision Service Plan Insurance | 4V | Employee Family |

< Back

Next >

| Privacy Policy | Terms Of Use | Help |

Step 5 - Submit The Record

Benefit Plan Systems, Inc. COBRA EAS plus GIBS

Confirm Information Sign Off

Please confirm the following information before clicking the Submit button

Participant

ID : 006-00-0066:00 Qual Code: RE Retiree

Last Name : Jackson First : Janet MI: J

Street : 123 Ocean Apt/PMB :

City : Dana Point State : CA Zip: 92629

E-Mail : janet@aol.com Ph: : (949) 240-4455 Birth Date: 01/23/1988

Sex: Male Female Marital : Married

Sponsor Date: 08/13/2008

Class: Qualification Date: 08/09/2008

Salary: Notification Date:

Years of Serv: Election Date:

Election Received:

< Back

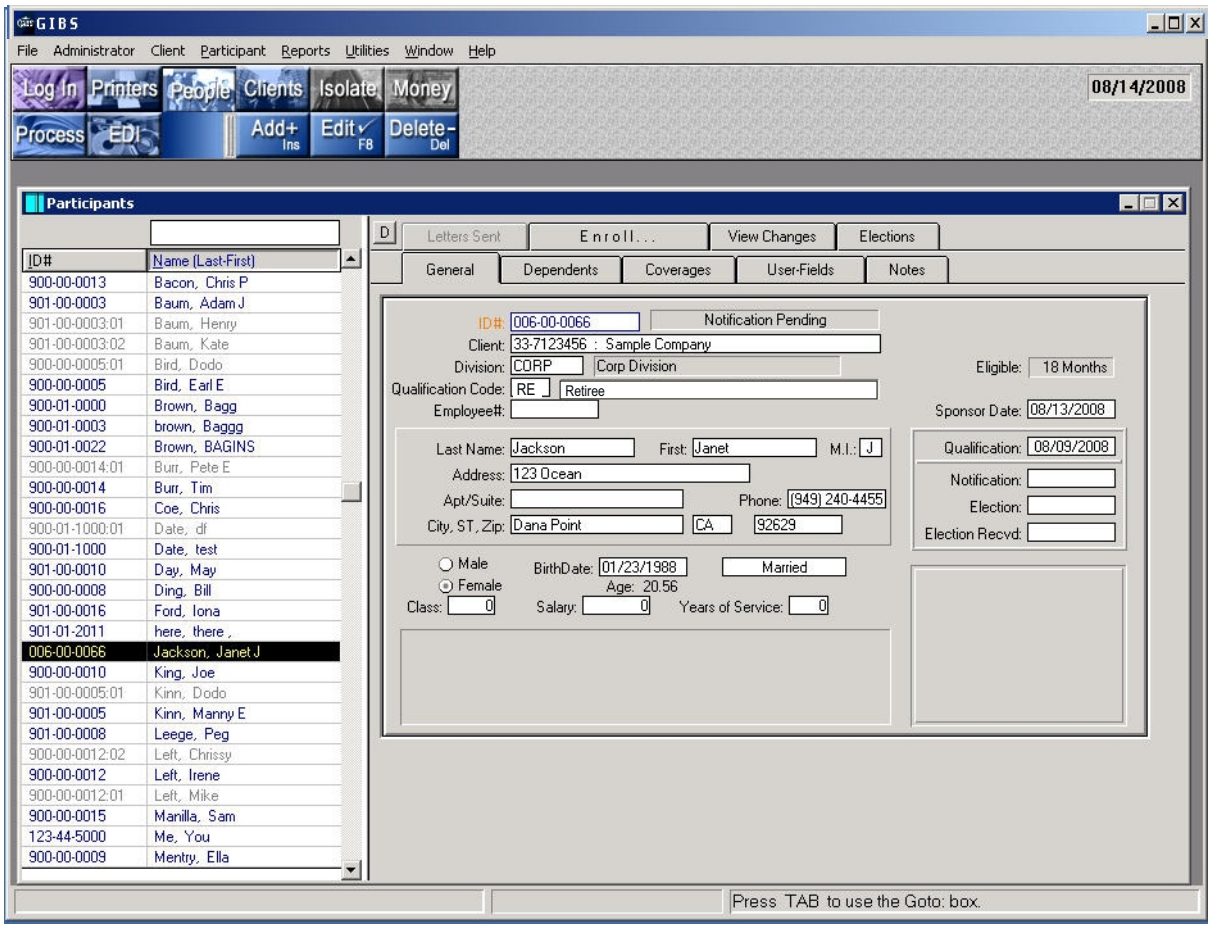
Coverage

| Carrier | Name | Code | Description |
|---|---|---|---|
| AHC | Aetna U.S. Healthcare | 2H | Employee plus 1 |
| DEL | Delta Dental | 2D | Employee plus 1 |

< Back

Submit

## Within Seconds The New Record Displays In The Desktop Data




## CSPWeb Technical Requirements

Pentium IV, 2.0 GHz+, dual processor server
1 GB Ram, Min 50 GB Storage
Fast DSL /T1 Internet Connection

Windows Server 2000+
IIS V5+
CSPWeb
CSPWeb Applications

## Development Language

| | |
|---|---|
| CSPSuite Applications | Visual C |
| CSPWeb | .Net 1.4 |

# System Requirements

## Hardware/Software Requirements

| File Server Network Management System | Workstation Operating Systems |
|---|---|
| * Windows NT/2000 Server/Server 2003<br>* 512 MB RAM (1GB RAM Recommended)<br>* 125 MB Disk Space<br>* Super VGA or better monitor<br>* CD-ROM<br>* Compatible mouse and keyboard<br>* USB Port Required For Bar Code Reader<br>* Windows Supported Printer | * Windows 98 or higher, Windows NT 4.0 or higher Windows 2000, XP<br>* 256 MB RAM (512 RAM Recommended)<br>* 125 MB Disk Space<br>* Super VGA or better monitor<br>* CD-ROM<br>* Compatible mouse and keyboard<br>* USB Port Required For Bar Code Reader<br>* Windows Supported Printer |

## Data Storage

| File Format | Reporting and 3rd Party File Access via ODBC |
|---|---|
| * Faircom Version 8.14 C-Tree/ISAM database with balanced trees.<br>* 18 Terabyte file size limit<br>* Fully cross platform compatability<br>* http://www.faircom.com | * Built-in Report Writer for access to most data from the data dictionary.<br>* Fully ODBC/SQL accessible via Faircom 32 bit ODBC driver. Supporting all core level functions. http://www.faircom.com/products<br>* All data accessible for Import/Export |

## Security

| User Access |
|---|
| * Network users must have full "rights" to program directory and subdirectories, including, but not limited to Read, Write, Search, Create and Delete.<br>* System Administrator can create system users, granting or revoking abilities to complete over 100 different tasks by user or by Client/User.<br>* System Administrator may remotely force any existing users off the system to perform exclusive operations.<br>* 128 bit data encryption available with Client Server. |

## Development Language

The development language used is Visual C using the Win32 API to perform the communication with Windows Internals.

## Other Considerations

* Installation of the program (on a network) is completely contained in the specified directory, i.e. no program files are installed in the C:\WINDOWS\SYSTEM path, therefore, installation does not have to be run on each individual workstation.
* No modifications are made to any windows INI files, and no registry keys are changed.
* All files are stored within one directory structure.
* Application and Data File locations can be customized.