



# The Plan Administrator

## Enrollment, Eligibility Maintenance And Consolidated Group Billing

calculate waiting periods, effective dates, premiums based on variables, pro-rate, retro-active charges and more. This system will change these functions from people tasks to system automated.

### Integration

All CSP Suite products are fully integrated, working together to form a powerful benefit administration system. You can easily relate the system to legacy or outside systems using ODBC/SQL, CSV or ascii.

### Data Archiving

All system output can be electronically archived on CD, tape or other storage media. These permanent records are available at any time for reprint or review using the built-in search engine.

### HIPAA Secure

Best practice HIPAA security is built in. Set time to log in, retry attempt limit, auto drop an inactive user, adverse event log and more.

### Audit Trail

Legal actions often arise in the course of benefit administration. Your ability to provide proof of action is critical. The TPA includes full automatic tracking of all system activity, by operator. Clear, detailed, permanent records of who did what and when it was done.

Combine these records with those in the archive to produce the proof required to support your actions.

### CSPWeb

Add the module for the fastest and most cost effective way to get your clients to the cloud. Built to include the highest recommended security standards.

### Introduction

The TPA automates the processes required to manage plan, participant, dependent, enrollment and eligibility data. It can output both detailed or summary billings, in a format designed by you, by plan within a client or consolidate all of the clients plans on one bill.

Extensive correspondence features that let you increase productivity and reduce costs. The system is a central clearing point, streamlining the flow of data and money between your company, your clients and their insurance carriers - with you retaining complete control of all data.

### Administration

Benefit administration starts with information and the TPA is very accommodating. It gives you instant access to every detail on people, coverage, premiums, enrollment dates and more.

Click on the Notes tab for a complete history of the participant from initial date to today - click on the Letters Sent tab to see an exact copy of any letters sent to the participant - or click on the Elections tab to view all coverage elections and change dates for each family member. It even shows you any letters returned as "undeliverable."

Minimizing errors and increasing productivity requires a system with enough logic built-in to automatically



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# Features That Turn The *Tedious Jobs Of Plan Administration Into Ordinary Tasks*

## Event Code Driven

The user can set up any number of Event Codes, then attach a whole set of correspondence and rules to automatically trigger actions whenever the event code is used.

For example, one client may want you to forward an Initial COBRA notice, Summary Plan Description and a Welcome Letter to each new hire.

Another may want to include a pre enrollment packet and all of the application forms.

Accommodate both by creating the documents and attaching them to the NH or New Hire Event Code. Whenever a new person is entered with the NH code the attached documents automatically output - addressed, collated and ready for the envelope.

## Flexible

The TPA is very flexible, allowing the user many ways to customize the system to a specific need:

Customize entry windows to include only the fields that you want.

Easily create an unlimited number of custom User Defined Fields to hold date, character, numeric or logical data - place them on the entry window.

The user can create any number of waiting periods that will automatically be used to determine effective dates.

Use the Pended feature to place a coverage increase or new enrollment on hold until required data is received.

Create your own custom letters, including those requiring a response. Automatically send multiple follow-up letters if response not received.

Automatically calculate rates that are based on one or more variables, such as age, length of service, health risk factors, etc.

## Complete Functionality

The TPA includes all of the functionality that you need to do the whole job:

Create a separate receivable for divisions within a client.

Set which coverages are Creditable and which are not. Use the regular Certificate or the Alternative Form.

Create custom recurring letters that are automatically output at pre set intervals to confirm special situations such as student status or medicare eligibility.

Report eligibility electronically to any carrier - in the format required by their specifications.

Custom report writer allows you to create any report using any system file or field in the data dictionary.

Easily get data in or out using ascii, csv, xml or ODBC/SQL.

Use Scripting to set up automatic file imports/exports at the time and frequency scheduled.

Completely layout the look and data that you want displayed on billings, including sub totals, totals, employer contributions, etc.

System accommodates the two most common process cycles, Pay As Billed or Client Adjusted Billing.

Automatic processing allows you to process just one client, a select group of clients or all clients. Output is automatically sorted by your selections and collated - ready for the envelope.

Bill for any time period - days, weeks, months, quarterly, semi-annual or annual.

# Sample TPA Output



Use the system editor to create billing layouts that meet your need. The samples below are included to illustrate the types of layouts that can be created.

**Name List Billing** Current participants by name, coverage, premium and other fields that you choose to display. Insert any subtotal and total columns desired.

**Summary And Reconciliation** Shows current and retro charges or credits, including previously unpaid balances. It can also be used as a return coupon and a change report form.

**Changes Report** Detailed list of each change made during the current billing period.

**Transaction Audit** Audit trail report of any premium changes, including retroactive debits and credits.

**Summary Billing** Summary of current period numbers covered, volume, premium and other selected data.

**Non Response List** Report of individuals who have not responded to a request for information.

The Name List Bill can be customized to meet your requirements. Add or delete columns, sub total, total any groupings desired, draw boxes, use shading, insert your logo to give it your own identity.

## Sample Name List Billing

GROUP INSURANCE PREMIUM STATEMENT											Page 1
ID# SMTH000034 Smith Tool Mfg. Co. Suite G100 1224 West Crescent St. Milwaukee WI 54476-0978		Pacific Administration Corporation									
		Billing Period 04/01/2001 To 04/30/2001 Premium Due Date 04/01/2001									
YOUR PREMIUM MUST BE RECEIVED BY THE DUE DATE SHOWN ABOVE											
Please Make Your Check Payable To: Pacific Administration Corporation											
											EO = Employee Only E1 = Employee + 1 EF = Employee + Family 0050 03/25/2001 17:40:21
Social Security	Name	Life Benefit	Cost	Health	Cost	Vision	Cost	Dental	Cost	Payroll Deduction	Total Due
xxx-xx-5566	Richards Keith	10000	\$1.00	EO	\$125.95	EO	\$4.00	EF	\$34.50	0	\$165.45
xxx-xx-8899	Johnson Robert	15000	\$1.50	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.75
xxx-xx-4533	Able John	18000	\$1.80	EF	\$455.10	EO	\$4.00	EF	\$34.50	\$329.15	\$495.40
xxx-xx-7766	Parsons Mary	10000	\$1.00	EO	\$125.95	EO	\$4.00	EO	\$ 9.50	0	\$140.45
xxx-xx-0999	Kline Tom	10000	\$1.00	EO	\$125.95	EO	\$4.00	EO	\$ 9.50	0	\$140.45
xxx-xx-7722	Zastrow Henry	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-0912	Jarl Peter	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-4532	Zorowski Paul	25000	\$2.50	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$500.10
xxx-xx-3322	Weitzle John	50000	\$5.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$502.60
xxx-xx-1212	Smith Joan	19000	\$1.90	EF	\$455.10	E1	\$6.00	E1	\$16.25	\$329.15	\$479.25
xxx-xx-1122	Carter Bob	10000	\$1.00	EF	\$455.10	E1	\$6.00	E1	\$16.25	\$329.15	\$478.35
xxx-xx-1234	Hendricks Eugene	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-1212	Sister Mary	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-3344	Amonson Carl	5000	\$ .50	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-8822	Eskeldson Chris	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$262.75
xxx-xx-6677	Sigford Steve	10000	\$1.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$498.60
xxx-xx-1212	Johnson Francis	25000	\$2.50	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$500.10
xxx-xx-2211	King Bernard	50000	\$5.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$502.60
xxx-xx-4422	King Delphine	50000	\$5.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$502.60
xxx-xx-2314	Reichert Tom	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-1234	Parker Jim	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-4422	Heath Kay	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-6009	Olivera Salvatore	10000	\$1.00	EO	\$125.95	EO	\$4.00	EO	\$ 9.50	0	\$140.45
xxx-xx-2299	Amigo John	12000	\$1.20	EO	\$125.95	EO	\$4.00	EO	\$ 9.50	0	\$140.65
xxx-xx-8899	Lacy Beth	23000	\$2.30	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$499.90
xxx-xx-3456	Heil Carol	10000	\$1.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$498.60
xxx-xx-5565	Helman Denis	10000	\$1.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$498.60
xxx-xx-0912	Wolinski John	50000	\$5.00	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$114.05	\$502.60
xxx-xx-5566	Eichman Robert	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-4312	Jensen Terry	10000	\$1.00	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$263.25
xxx-xx-0990	Latham Carl	25000	\$2.50	E1	\$240.00	E1	\$6.00	E1	\$16.25	\$114.05	\$264.75
xxx-xx-0123	Westerman Keith	32000	\$3.20	EF	\$455.10	EF	\$8.00	EF	\$34.50	\$329.15	\$500.80
Totals	32	579,000	\$57.90		\$10,121.15		\$202.00		\$730.25	\$5,875.65	\$11,111.30





The change report is designed to provide a detailed record of all changes in the current billing period.

## Sample Change Report

### GROUP INSURANCE PREMIUM STATEMENT

Page 1

ID# SMTH000034  
Smith Tool Mfg. Co.  
Suite G100  
1224 West Crescent St.  
Milwaukee WI 54476-0978

Pacific Administration Corporation

CHANGE REPORT  
Billing Period 04/01/2001 To 04/30/2001

0080 03/25/2001 17:40:21

Social Security	Name	Changes	
xxx-xx-1234	Parker Jim	Participant Added. Hire Date 02/15/2001	*ADD*
		Coverage BCX100:E1 Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Coverage DEN100:E1 Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Coverage VIS100:E1 Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Coverage STD004:L1 Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
xxx-xx-0912 xxx-xx-0123	Parker Kathy Westerman Keith	Dependent Added.	*ADD*
		Participant Added. Hire Date 02/18/2001	*ADD*
xxx-xx-0912 xxx-xx-1212 xxx-xx-7222 xxx-xx-0123 xxx-xx-2758	Westerman Jane Westerman Tom Johnson Francis Kline Tom Latham Carl Castro Felipe	Coverage BCX100:EF Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Coverage DEN100:EF Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Coverage VIS100:EF Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Coverage STD004:L1 Added. Effective Date 03/01/2001 Starts 03/01/2001	*ADD*
		Dependent Added	*ADD*
xxx-xx-6114	Collins Chris	Participant Date Of Birth Changed From 01/24/1943 To 01/14/1943	*CHG*
		User Field {CLASS} Data Changed From: '00005' To '00007'	*CHG*
		Dependent:03 'LORAN' Added. Effective Date: 04/03/2001	*CHG*
		Participant Terminated. Date: 03/11/2001	*TERM*
		Coverage STD004:L1 Terminated On 03/31/2001	*TERM*
xxx-xx-6116	Jackson Robert	Coverage BCX100:EO Terminated On 03/31/2001	*TERM*
		Coverage DEN100:EO Terminated On 03/31/2001	*TERM*
		Coverage VIS100:EO Terminated On 03/31/2001	*TERM*
		Participant Terminated. Date 02/12/2001	*TERM*
		Coverage STD004:L1 Terminated On 02/28/2001	*TERM*

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The Transaction Audit Report provides a permanent audit trail of any changes in premium amounts.

## Sample Transaction Audit Report

### GROUP INSURANCE PREMIUM STATEMENT

Page 1

ID# SMTH000034  
Smith Tool Mfg. Co.  
Suite G100  
1224 West Crescent St.  
Milwaukee WI 54476-0978

Pacific Administration Corporation

TRANSACTION AUDIT REPORT  
Billing Period 04/01/2001 To 04/30/2001

0040 03/25/2001 17:40:21

Name	Social Security	Event	Effective	Coverage	Premium
Parker Jim	455-77-1234	NH	03/01/2001	BCX100:E1 Health	\$240.00
Westerman Keith	723-98-0123	NH	03/01/2001	BCX100:EF Health	\$455.10
Jackson Robert	127-17-6116	VT	02/28/2001	BCX100:EO Health	(\$125.95)
					-----
Parker Jim	455-77-1234	NH	03/01/2001	STD004:L1 Life	\$569.15
Westerman Keith	723-98-0123	NH	03/01/2001	STD004:L1 Life	\$1.00
Jackson Robert	127-17-6116	VT	02/28/2001	STD004:L1 Life	\$ 3.20
					-----
					\$3.20
Parker Jim	455-77-1234	NH	03/01/2001	DEN100:E1 Dental	\$16.25
Westerman Keith	723-98-0123	NH	03/01/2001	DEN100:EF Dental	\$34.50
Jackson Robert	127-17-6116	VT	02/28/2001	DEN100:EO Dental	(\$9.50)
					-----
					\$41.25
Parker Jim	455-77-1234	NH	03/01/2001	VIS100:E1 Vision	\$6.00
Westerman Keith	723-98-0123	NH	03/01/2001	VIS100:EF Vision	\$8.00
Jackson Robert	127-17-6116	VT	02/28/2001	VIS100:EO Vision	(\$4.00)
					-----
					\$10.00
					**\$623.60**

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The Summary or Negative billing method is used for insurance companies who only require a carry forward total of numbers covered and volume for each billing period.

## Sample Summary Billing

### GROUP INSURANCE PREMIUM STATEMENT

Page 1

ID# SMTH000034  
Smith Tool Mfg. Co.  
Suite G100  
1224 West Crescent St.  
Milwaukee WI 54476-0978

Pacific Administration Corporation

Billing Period 04/01/2001 To 04/30/2001  
Premium Due Date 04/01/2001

YOUR PREMIUM MUST BE RECEIVED BY THE DUE DATE SHOWN ABOVE

Please make your check payable to: Pacific Administration Corporation

0060 03/25/2001 17:40:21

Coverage	Number Covered	Last Month	Volume	Volume Last Month	Current Premium	Payroll Deductions	Retro Debits	Retro Credits	Net Due
STD004:LI	32	33	579000	547000	\$57.90		\$4.20	(\$1.00)	\$61.10
BCX100:EO	5	8			\$629.75			(\$125.95)	\$503.80
BCX100:E1	13	12			\$3,120.00	\$1,482.65	\$240.00		\$3,360.00
BCX100:EF	14	13			\$6,371.40	\$1,763.30	\$455.10		\$6,826.50
DEN100:EO	4	7			\$38.00			(\$9.50)	\$28.50
DEN100:E1	15	14			\$243.75		\$16.25		\$260.00
DEN100:EF	13	12			\$448.50		\$34.50		\$483.00
VIS100:EO	6	9			\$24.00			(\$4.00)	\$20.00
VIS100:E1	15	13			\$90.00		\$6.00		\$96.00
VIS100:EF	11	10			\$88.00		\$8.00		\$96.00
	32				\$11,111.30	\$3,245.95	\$754.05	(\$140.45)	\$11,724.90

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The Non Response Letter Report automatically shows you which participants have not responded to a request for additional information.

## Sample Letter Non Response Report

ID# SMTH000034  
Smith Tool Mfg. Co.  
Suite G100  
1224 West Crescent St.  
Milwaukee WI 54476-0978

0020 03/25/2001 17:40:21

Name	Social Security	Date Sent	Date Received	Letter
Kline Tom	213-34-0099	03/02/2001		2100
Lacy Beth	533-87-8899	02/12/2001		1215

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