

## Use EasyCert to output correct Certificates of Creditable Periods of Coverage, New Hire Initial COBRA Notices and more.

It's event code driven, allowing you to create and attach a whole series of forms, notices and other correspondence to automatically output whenever a specific event is recorded. For example, an NH or new hire might be designated to get a welcome letter, description of benefit options, initial COBRA notice and information about waiting periods or other notices. An RC or Requested Change could automatically cause a confirmation notice to output. A TE or Termination event could cause a Certificate Of Creditable Coverage to automatically output.

Current information can easily be entered or imported, making transaction record keeping simple. A complete compliance audit trail is automatically maintained by the system.

EasyCert is designed to maintain a transaction oriented database on all active employees and their eligible dependents. It automatically outputs Certificates Of Creditable periods of coverage and much more.

- Enter or import current information to easily keep benefit plan transactions up to date.
- Complete, automatic handling of probationary or waiting periods.
- Category specific correspondence sets.
- No limits to the number of plans, coverage levels, carriers and other system definitions.
- Complete built-in reports module. Modify existing reports or create new reports.
- Automatic output of regular certificate or the alternative form.
- Add any number of user defined fields that can be date, character, logical or numeric - embed the field in correspondence.
- Reprint Certificates Of Creditable periods of coverage anytime.
- Automatically track dependent age, student status and other relative items.



**EasyCert**  
Employer

Follow the literal, illustrated instructions in this guide to see what this application can do in the quickest way possible.

- A** Setup
- B** Add Data
- C** Process

### Benefit Plan Systems Corporation

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## **Introducing EasyCert Administrator**

In widespread use since 1996, EasyCert Administrator has earned a reputation as the most reliable and complete administration system available for handling the initial new hire COBRA notice, accurate Certificates Of Creditable Periods of Coverage and other plan letters and documents.

EasyCert can automate the process of periodically sending out letters to check various conditions such as continued student status, dependent eligibility, Medicare entitlement and more.

### **Quick Start Guide**

The step by step literal instructions in this guide are designed to take you through all major functions in the shortest amount of time possible. Following the guide you will be able to set up and start processing people in about 30 minutes.

After completing all of the steps feel free to return to any menu choice to investigate the system further or add more data. You will be able to access the demo system for about 30 days, after which it will stop working.

### **System Features**

#### **Easy To Learn And Use**

EasyCert is intuitive, with easy to use menus. Just move your cursor to any browse area (white data area) then click once on your right mouse button for a menu that lets you select any currently available item.

#### **Flexible**

Enter any number of insurance companies, rates, divisions and plans. You can add new or edit any system correspondence and even control whether or not to use it. You can create unique letters for each category or event type.

#### **Complete**

EasyCert is designed to do the whole job. A complete report generator, upload and download utility are included in the base system. You can create special user-defined fields to hold numeric, date, character or logical data; you can maintain any number of plans and rates and create your own custom letters, employee notices, or other documents that can be sent at will or on a recurring schedule.

#### **Supported**

EasyCert is supported by highly trained telephone support representatives. Extended support customers enjoy unlimited toll free 800 phone support, free upgrades and newsletters. We also offer training, data conversion and consulting services - at your site or ours.

#### **Complete Audit Trail**

EasyCert automatically maintains a complete audit trail including who, what, when and how actions were completed. Full history is kept for as long as you need it. View or output reports on history files at any time.

**EasyCert Administrator** is part of the **Employer Administration Suite** of products from **Benefit Plan Systems Corporation**. Our web-enabled applications can be used alone or fully integrated with other suite members to form a powerful benefit processing system...

## **OTHER EMPLOYER ADMINISTRATION SUITE PRODUCTS**

### **The Plan Administrator (TPA)**

Complete enrollment, eligibility maintenance and consolidated group billing system.

### **COBRA EAS**

Complete COBRA compliance system - automatically handling every detail - from Notification through Conversion.

### **GIBS**

Group Insurance Billing System handles direct bill retirees, leave or any other non-COBRA continuing coverage.

**The Above Suite Members Are Included On  
The Demo CD You Received - Go to Start -> Programs ->EAS Suite**

## **OTHER EMPLOYER ADMINISTRATION SUITE ADD-ON PRODUCTS**

### **ODBC/SQL Driver**

The ODBC/SQL driver makes integrating our systems with any others easy. Provides full access to any file or field in the data dictionary. Useful anytime there is a need to easily export data to any other ODBC or SQL product for reports or other purpose.

### **Bar Code Module**

Increase productivity by printing a bar code on election forms - then use a stationary or pen held scanner to simply scan elections. The Reader attaches to any keyboard for quick and easy installation.

### **CSPWeb**

The web module is a real time interface allowing secured exchange of data between your server and your authorized operators and your participants. Using .Net technology the module allows authorized users to add new participants, view data and request edit. You have complete control of your data, on your own server.

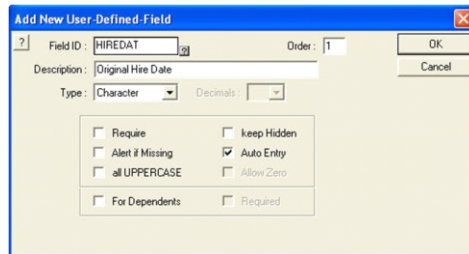
## User-Defined Fields

The problem with "off the shelf" systems is that they often don't meet the requirements of your company. This isn't a problem in EasyCert. We literally give you hundreds of ways to modify the system to meet your company's requirements.

One of the most powerful features in EasyCert is the ability to create User-Defined Fields (UDFs); Use UDFs to set up new fields to meet your specific data needs.

To create a UDF, go to the Menu Bar. Click on Maintenance, Options; select User-Defined Fields.

In the Add New pop-up, define your new User-Defined Field.

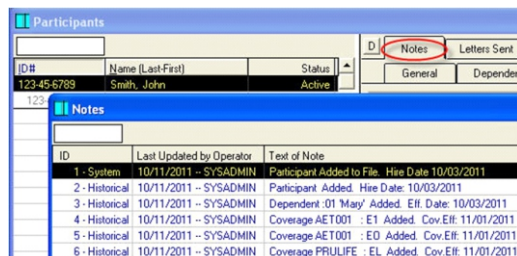


UDFs can be character, date, numeric or logical and can be displayed on your entry windows to add to or replace fields that you are not using. In addition to storing the data you need, UDF's can be used in the reporting tool and with the logical /IF function in letters to customize text.

## THE AUDIT TRAIL

Many times correspondence to your participants regarding benefits is required by federal regulations. When questions arise as to your actions in providing your participants the required documents, EasyCert provides you with tamper proof features that let you prove who did what, when and why. If you look closely at competitor systems you will find that when data is edited the new data simply overwrites the old, putting your company in a completely defenseless position. When you are called to court you will appreciate the care our software engineers exercised to give you all of the back up data you will need - data that is automatically logged in the background.

The audit trail starts from the moment a record is imported or entered. The system keeps several types of notes, such as **User Notes** (special notes that an operator can enter for any purpose. User Notes can be edited by the original operator at any time) and **System Notes** (permanent records of all system activity. System Notes cannot be modified in any way).



ID	Last Updated by Operator	Text of Note
1 - System	10/11/2011 - SYSADMIN	Participant Added to File. Hire Date 10/03/2011
2 - Historical	10/11/2011 - SYSADMIN	Participant Added. Hire Date: 10/03/2011
3 - Historical	10/11/2011 - SYSADMIN	Dependent '01 Mary' Added. Eff. Date: 10/03/2011
4 - Historical	10/11/2011 - SYSADMIN	Coverage AET001 : E1 Added. Cov.Eff: 11/01/2011
5 - Historical	10/11/2011 - SYSADMIN	Coverage AET001 : EO Added. Cov.Eff: 11/01/2011
6 - Historical	10/11/2011 - SYSADMIN	Coverage PRULIFE : EL Added. Cov.Eff: 11/01/2011

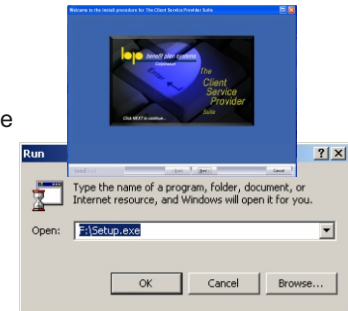
Highlight any person in the participant browse and select the Notes tab to the right to see the detailed audit records which are automatically kept by the system.

Strict standards are maintained to create an offsetting entry for any activity in the system. For example, if a significant date is modified, the original date is kept in the record along with the date the change was made and who made it.

## Installing EasyCert Administrator

Insert the CD in your CD Rom drive and it will automatically start the install process. If autorun is disabled on your computer use the RUN command.

The setup program will step through the installation; follow the instructions on the subsequent pop-ups to complete the installation



## Log on to EasyCert

To start EasyCert go to Start -> Programs -> EAS Suite -> EasyCert or use the desktop shortcut if one was created during installation.

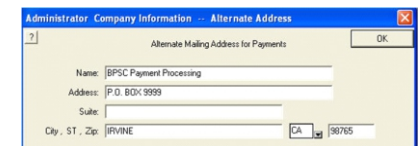
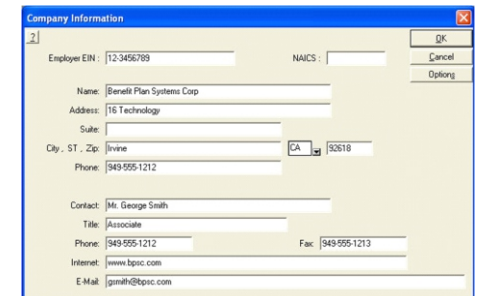
Via the login screens:  
Log in as SYSADMIN with  
password of PASSWORD.



## A Setup Your Company

### Step 1 - Company Information

1. Upon your first login into the EasyCert system the **Company Information** input window will Appear. You must complete this window before you can proceed any further.
2. Enter your company EIN and name, address and other data, including contact information.  
*Note: This contact information can be used on correspondence sent to carriers or participants.*
3. Click **Options** to enter an Alternate Address for inquiries Or other correspondence. Click OK.



## Company Setup

To setup other important parameters, go to **Maintenance** in the Menu Bar and select Setup.



Review the settings in the SETUP pop-up:

#### A. Entry Status:

Participants can begin as **Enrolled** or awaiting enrollment (**Pending**); Select **Choice** here to choose the participant's status when entering them into the system.

#### B. Address Salutation:

Choose from 8 different styles - click on the See Samples button to view.

#### C. Waiting Periods

Choose **Print All Waiting Periods** to show all Waiting Periods for each coverage listed on Certificates; choose **Print if Terminated During Waiting Period** to show the Waiting Periods if an employee terminates during the coverage waiting period.

#### D. Lead Times:

The amount of time for the system to "look ahead" when determining when to send out the Maximum Dependent Age notification.

#### E. Calendar Offset

For the Quick Start, leave this in the default setting of January.

#### F. Suite on Separate Line:

Check here to put the address Suite number on a separate line when printing correspondence.

#### G. At Termination, Transfer:

If you have other EASSuite products that handle COBRA, Family Medical Leave and Retirement administration, you can transfer a person to the product upon their termination. Select **Automatic** or **with Confirm** to do this. Select **Never** if you do not have other products.

Click OK to save your Employer Setup. Your company setup is now complete. You can modify the Company Information and Setup at anytime by returning to **Administration -> Company Information** and **Maintenance -> Setup**.

## Step 2 - Add ERISA Plan Data

ERISA Plan information is required on Certificates of Coverage. This information is always available in the Summary Plan Description.

1. Go to the Menu Bar; click on Maintenance; select Plans.
2. The Plans browse will appear; click on **Add+** or right click in the browse; select Add.

3. In the Add New Plan pop-up: Leave Division ID blank; Add the Plan ID, Name and Administrator Information.

Click on OK and repeat 2 and 3 for each Plan you wish to add.

## DATA HANDLING (Continued)

### Data Archiving

One of the major problems faced by benefits administrators is what to do with the enormous amounts of paper that must be stored to be able to prove that an action was completed. This system solves the problem using electronic archiving. The system automatically creates an archive copy of every document it prints and *these archived copies can be viewed at any time or saved on CD or other storage media*. A built-in search engine allows you to find stored documents by social security, name and date with ease.

You can reprint any document output by the system, at any time, exactly as it was originally printed.

### History

Archiving, described above, is used for system output, but the individual records of each person, his dependents and coverages must be retained as well. The system includes a very comprehensive capability for retaining historic data.

Any system records that are not needed in the active files can easily be placed into history by doing a very orderly file reorganization process. You can also send individual records to history. Simply highlight any terminated or inactive person, right click and select *Send to History Files*.

History records can be viewed at any time, and reports can be run on the records in the history files. To maintain a proper audit trail, records in history cannot be edited. However, people in history can be reinstated to the active file. When this is done, a detailed audit trail record is automatically maintained in the note file.

### Archive and History Utilities

You can create and access the archived and historic records quite easily using the system's Archive Search and Reorganization utilities.

To explore these tools go to Utilities in the main program window.

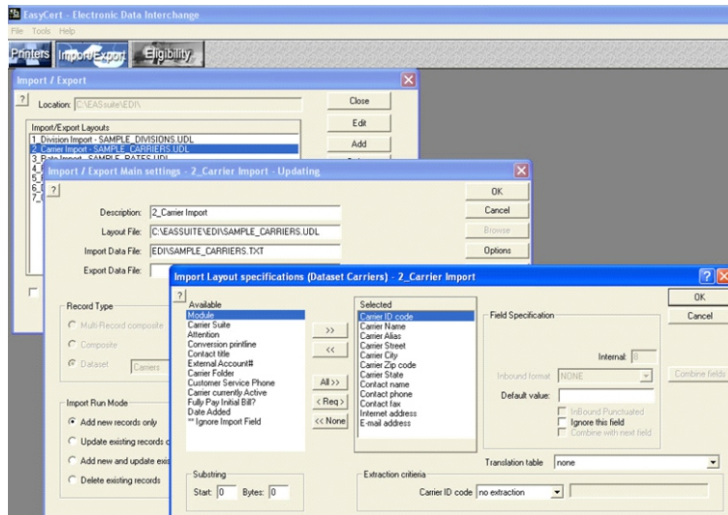
## DATA HANDLING FEATURES

### Electronic Data Interchange (EDI)

The EasyCert EDI tool provides you the means to import and export multiple records when you have a large amount of data to input or transfer. To open the tool, click on the EDI button.

#### Importing Data

The EDI module includes up to date features that let you easily import data from any .csv or sdf file. Click on the Import/Export button in the main EDI window. Import anything from Divisions, Carriers and Rates to Participants, Dependents and Coverages.

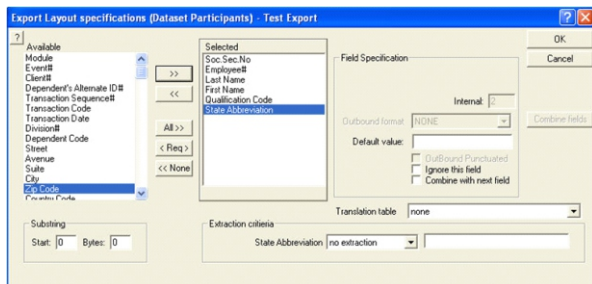


#### Exporting Data

The EDI module also allows you to export data from any table shown in the system's data dictionary. Click on Import/Export in the main EDI window. Export Divisions, Carriers, Rates, Participants, Dependents and Coverages.

Just select the dataset you would like to export and which fields should be included.

Export data to .csv or .txt formats.



### Step 3- Categories

Using categories, you can uniquely administer any number of different types of continuing coverage. Separate letter sets, parameters and more can be assigned by category.

The EasyCert system comes with some pre-defined, common categories: Active Employee and Family Medical Leave. These categories should meet your needs for most standard administration tasks, but you can use the ADD+ button to add your own special categories should there be special processing or situations that the EasyCert pre-defined categories do not address.

For the purposes of the quick start, let's use the pre-defined categories.

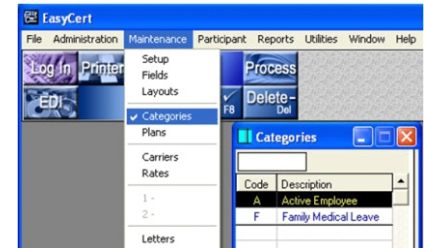
Let's look at the category settings:

Go to the Menu Bar; click on Maintenance; select Categories.

You will see 2 categories in the Categories browse:

Active and Family Medical Leave.

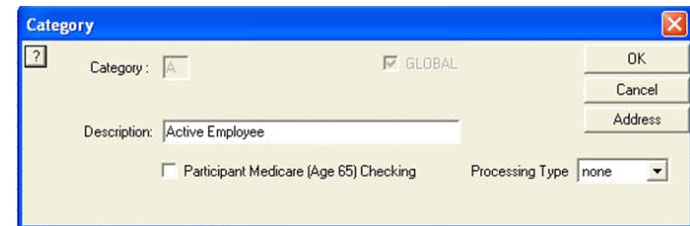
Settings for the Family Medical Leave category are based on federal laws. Settings for Active Employee are based on standard industry practice.



To see the settings for the pre-defined Active Employee category, highlight Active Employee in the Categories browse and click the EDIT button (or right-click on Active Employee and select Edit).

In the Category pop-up, you can enter a description and choose a processing type. The defaults for the Active Employee category are sufficient for the Quick Start.

You can check **Participant Medicare (Age 65) Checking** to automatically display the person on the data exceptions list just prior to reaching Medicare age.



Click the Address button to maintain a separate contact address for this Category.

Click OK or Cancel to close.

## Step 4- Add Carriers

Next, add the insurance companies or CARRIERS.

Carriers will include insurance companies providing coverage for Health, Dental, Vision and Life.

To add a new carrier, go to **Maintenance** in the Menu Bar; select Carriers.

The Carriers browse will appear. Click **Add+** or right click in the browse and select Add.

In the Add New Carrier pop-up, input the Carrier information.

Let's add Health carrier Aetna - enter AET001, the unique Carrier ID.

Enter a **Carrier Alias** if plan participants are familiar with a plan name that differs from the actual name.

For example, the AETNA Life & Casualty Plan 1000 may commonly be known as the AETNA Low Option Plan.

If you might use the alias name on correspondence then enter a Carrier Alias.

Complete the name, address and contact information.

Repeat the steps above to add PRULIFE, a life insurance carrier, and as many other carriers as you need to.

Your Carrier browse should now look similar to the one shown here:

## REPORTS (Cont)

### Automated Reports

EasyCert also has an Automated Reports utility that can run a variety of predefined reports immediately or on a recurring schedule. Close all other windows in EasyCert and go to Reports and click on Automated Reports. This will bring up the Automated Reports queue. Click on Add to create a new automated report.

In the Add New pop-up, select Rights and Report Type; enter a brief Description and input your Report Options. Use the Parameters button to define even more settings.

Use the Schedule button to set up a recurring run time for the report.

After you have set your parameters and schedule, click OK in the Add New window and your report will appear on the queue. If you did not set up a scheduled run time, the system will attempt to run the report immediately.

Note: Before you can run an Automated Report, the Automated Reports Engine must be running. If you submit a report before launching the engine, the program will ask you if you wish to start the Automated Reports Engine - click Yes.

To launch the Automated Reports Engine, right click in the Automated Reports queue and click on start the Automated Reports Engine.



## REPORTS

The system includes a variety of standard reports accessible from the Reports Menu. Using parameters such as date ranges you can produce professional reports from our pre-defined list or you can create your own custom reports. To explore the extensive reporting tools you must first close all other windows in EasyCert. Go to the Reports menu.

Select a report set like Program reports or reports on Qualified Participants...

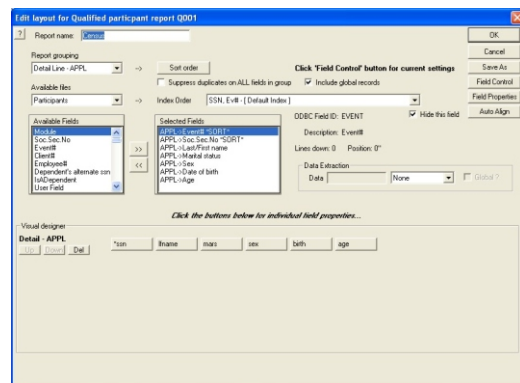
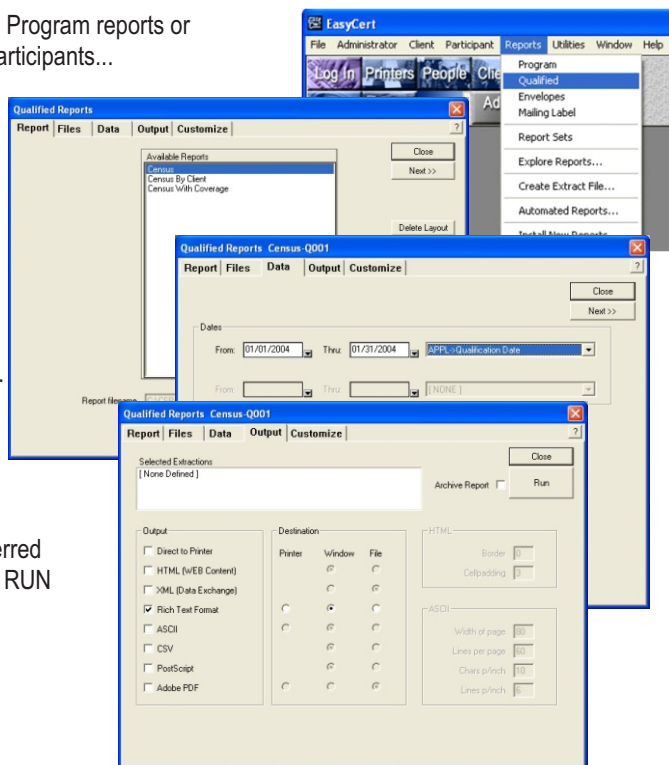
...next, select one of the standard default reports...

...add any special selection criteria such as date ranges...

...select your preferred type of output and RUN the report.

Use the report designer to create completely new reports with titles that display on the regular menus. Format the report just the way you want it.

Reports can be run either from the active or history files.



## Step 5 - Add Rates

The EasyCert program helps you keep track of an employee's coverage for use on HIPAA Certificates. HIPAA Certificates only require the level and description of each coverage rate; specific dollar amounts are not maintained.

Rates are added to the system for each Carrier.

To add a rate, go to the Menu Bar and click on Maintenance; select Rates. Click Add+ or right click in the Rates browse and select Add.

The Add New Rate pop-up will appear:

### Coverage Code:

Rates are entered for each level of coverage - for example, you may want three tier health coverage rates for "Employee", "Two Party" and "Family". Use the 2 character coverage code to designate the coverage levels, such as:

"EO" - Employee Only

"E1" - Employee and one dependent

"EF" - Employee and family.

### CREATE NEW RATES:

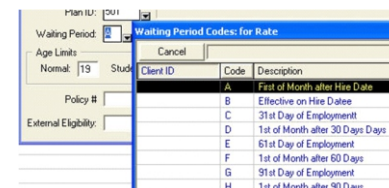
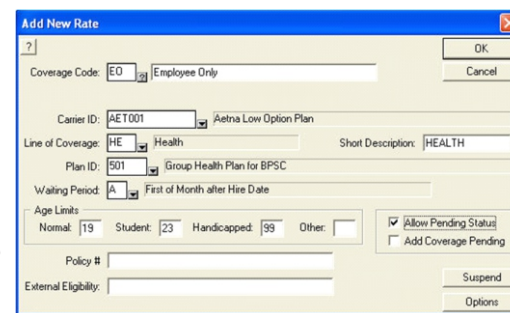
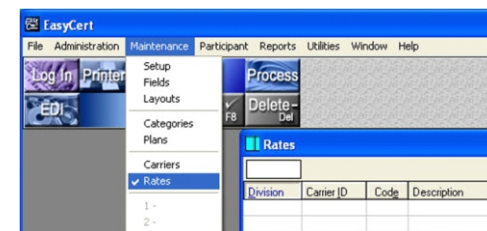
Enter "EO" and "Employee Only" as the **Coverage Code**; choose the Carrier ID added in Step 4, the Plan ID added in Step 2 and HE as Line of Coverage with Short Description of HEALTH.

There are various **Waiting Period** codes; for the Quick Start we will use Code A (First of Month after Hire Date) - meaning coverage will start the first day of the month following the person's hire date.

See other settings in the Waiting Period pull down list.

When only **Allow Pending Status** is checked, the 'pending' box will display when adding coverage to participants, providing option to check box. If **Add Coverage Pending** box is also checked, then coverage will automatically be tagged 'pending' when coverage is added.

Leave the **Allow Pending Status** unchecked.



## Step 5 - Add Rates (Cont)

Click on **Options** to set the coverage end time and other HIPAA related items.

For purposes of the Quick Start, leave the default settings in the Options window and click OK.

Click OK to save your new rate.

NOTE: if you are interrupted when adding a rate, use the **Suspend** button. Any information that you have entered for the new rate will be saved. When you are ready to continue adding the rate, go back to the Rates browse, right click in the General tab and select RESUME...

## PROCESSING OPTIONS

The processing functionality is the central point of the system. When you process, the system evaluates all of your file data, looking for any action that needs to be completed.

A newly entered person may need a initial COBRA notification, another may need a HIPAA Certificate.

All of the details of administration, with the exception of inputting the data, are handled by the process. You can process one person at a time, one category or your entire population. You can also control processing by limiting each operator's process abilities.

Click on the **Options** button at the lower right of the process window to view the selections shown here.

### Data Exceptions

The first item produced by the process is the Data Exceptions report. This report shows which data in your files is not complete and may not process.

For example, the report will show a person with missing data or persons approaching the policy limiting age or Medicare age.

You can set the process to pause, after outputting the report so that you can go back and make any necessary corrections before continuing. You can also select which items will be reviewed prior to outputting the report.

### Letters & Certificate Of Mailing

You can choose to output a report of all letters that were produced by the process and even a Proof Of Mail report, ready for the post office.

### Log Files

Detailed log files of various process activity can be selected - these files can be saved for review.

### Default Sort Order

The user can set the process output order. For example - set up the sort order to output documents by Social Security Number so that all items for one person will be output together. You can also set up the output to print by letter type, so that all certificates are printed together and all notifications are printed together, etc. Being able to set the output order is significant in saving you the time involved in sorting through the output by hand. Click on Default Sort Order to view all your options.

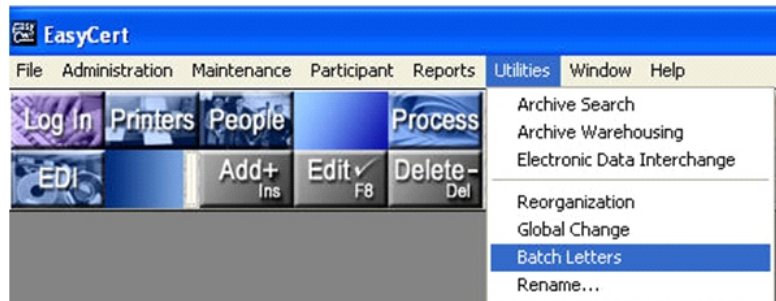


## LETTERS & NOTICES (Continued)

### Batch Letters

When circumstances call for your participants to receive special notifications, the Easy Cert system provides you the BATCH LETTERS tool. For example, use batch letters to send out Open Enrollment notices or Change of Address notices.

To access the Batch Letters utility you must first close all other windows in EasyCert. Go to Utilities and select Batch Letters.



In the Batch Letters input window, input your settings for your batch letter:

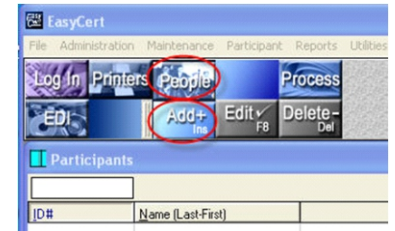
As you can see, the Batch Letter utility can handle any circumstance that requires notices or letters to be sent to particular group based on division, coverage, event code or category. See Options for more settings. Use current or historical data and use System Note to add any special text to appear each addressee's note file; select the output format that is appropriate for your purposes.

## Step 6a - Add a Qualified Person

The system is now set up to add People.

Click on the **PEOPLE** button and then click on **Add+** or right click in the Participants browse and select Add.

**Let's add a person.**



In the Add New Participant window, input the information about the new Person:

**ID#:** Use Social Security Number or any other unique numeric identifier. Do not input dashes -these will be added for you.

**Status:** Select Pending if the person has not elected coverages yet or is awaiting approval for a coverage; select Enroll if the participant will be enrolled automatically.

**Event Code:** In the drop down menu, select the applicable event code. The system handles a variety of situations but for the Quick Start, select NH, New Hire.

Input Name, Address and other data. Employee# is optional and you can skip it for the Quick Start.

**Hire Date:** Enter the Event Date in the format MM/DD/YYYY or use the drop down calendar to choose a date;

**Notice Date:** If an initial new hire Cobra notice was sent, enter the date sent in the format MM/DD/YYYY or use the drop down calendar to choose a date;

Click OK.

**NOTE:** if you are interrupted when adding a participant, use the **Suspend** button. Any information that you have entered will be saved. When you are ready to continue go back to the Participants browse, right click in the General tab and select RESUME...

## Step 6a (Cont) - Add a Qualified Person

The Add New Dependent window will appear. Add the new participant's dependents now.

**Dep. Code:** In the drop down menu, select the applicable dependent code. For the Quick Start, add a spouse, SPO.

Input the spouse's first name, (last name, if different); enter address, if different.

Complete the remaining items (Sex, Birth Date, Marital status) and input spouse's Social Security Number as Alternate ID.

Leave the Dep. Effective date as the default value.

Click Next and then Done.

You will see the newly added dependent in the Adding Dependents pop-up.

If you need to add more dependents, click Back; to change the new dependent, click Edit or Delete - otherwise, click Finish to complete adding new dependents.

The first screenshot shows the 'Add New Dependent of John Smith' window. It contains fields for Dep. Code (SPO), Dep. Effective date (10/03/2011), Last Name (Smith), First (May), M.I., Street (123 Main Street), Suite, City, ST, Zip (Irvine, CA, 92618), E-Mail (jsmith@aol.com), Pk (949-333-1414), Sex (Male), Birth Date (11/10/1977), Marital (Married), and Alternate ID (987654321).

The second screenshot shows the 'Adding Dependents' window. It displays a table of dependents:

Relationship	Name	Birth Date
SPO	May	11/10/1977

Buttons for Back, Edit, Delete, and Finish are visible.

## LETTERS & NOTICES (Continued)

### Edit & Output

From the Letters browse, the user has complete control over both the text and file data for all letters. Rich text editing and visual controls allow anyone to create very attractive letters.

To edit a letter -

- Highlight a letter in the Letters browse.
- Click Edit or right click and select Edit Letter Text.

This will bring up the Letter Editor, in which you can change the letter text and add or delete any file data to/from the letter contents.

The 'Letters' window shows a list of letters with columns: Category, CLIENT EIN, Ltr #, and Description. The list includes various notices like HIPAA Privacy Notice, Medicare Part D Notice, Initial COBRA Notice, etc. The 'Edit' button is highlighted.

### Embed Fields

You can insert (embed) any appropriate program field into your letters or notices by placing your cursor in the desired place and choosing the field from the Embed drop down list; you can manually add the field by enclosing it in brackets at the desired place in the letter.

For example, below we have embedded the {SAL} salutation and {LNM} last name.

The letter template shows the salutation 'Dear {SAL} {LNM}' and the first paragraph of text. The fields are circled in red.

### Logical Ifs

You can insert logical /IF criteria in your letter that will cause special paragraphs to print in place of or in addition to the normal text when the participant record meets the criteria.

For example, the letter below uses a logical if, then statement to include additional text when the state part (embedded field {STA}) of the participant address is California.

The letter template shows the title 'TITLE NOTICE OF RIGHT TO ELECT COBRA CONTINUATION COVERAGE' and the first paragraph of text. The logical if, then statement is circled in red.

The EasyCert Letter Editor provides these and many other tools to help you create custom professional letters and documents for all your administration needs.

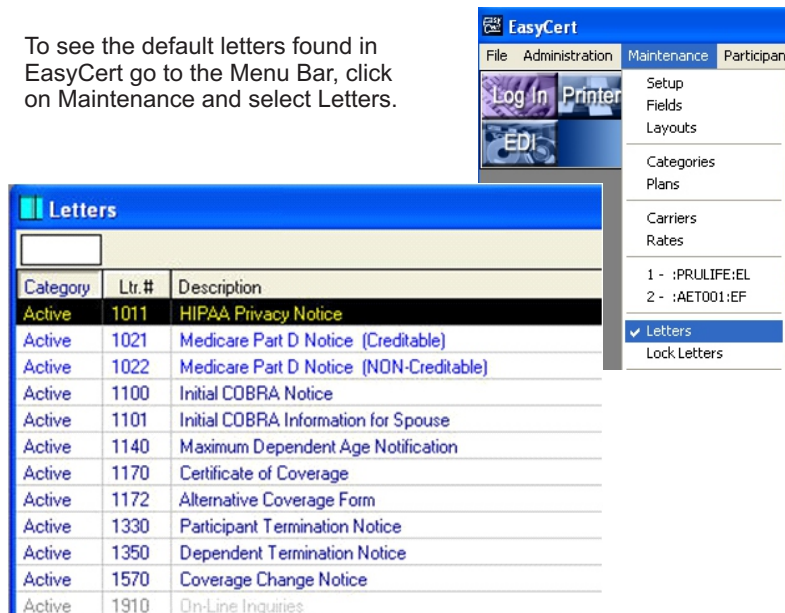


## LETTERS & NOTICES

This type of administration is very correspondence intensive. The system includes a complete set of letters and forms that you will need in the course of normal administration.

The default letters file contains a set of letters and forms that you will need in the administration of Active employees. You can also add any number of custom letters to be used for special purposes.

To see the default letters found in EasyCert go to the Menu Bar, click on Maintenance and select Letters.



The above letters and notices are or can be produced automatically by the EasyCert system based on the participant Event Codes. The system is programmed to calculate the effective dates based on hire dates and waiting periods and produce the correct HIPAA certificates.

You can add letters and notices for Family Medical Leave, Retiree, Leave of Absence (LOA) and any other user defined category to the system. These letters can be set up to be issued based on industry standards or any other settings that you specify.

All system notices and letters can be used in their default formats or you can create custom documents that include text and information specific to your administrative organization. Set up custom letters and documents to be sent out as a batch job to disseminate information to specific groups of participants.

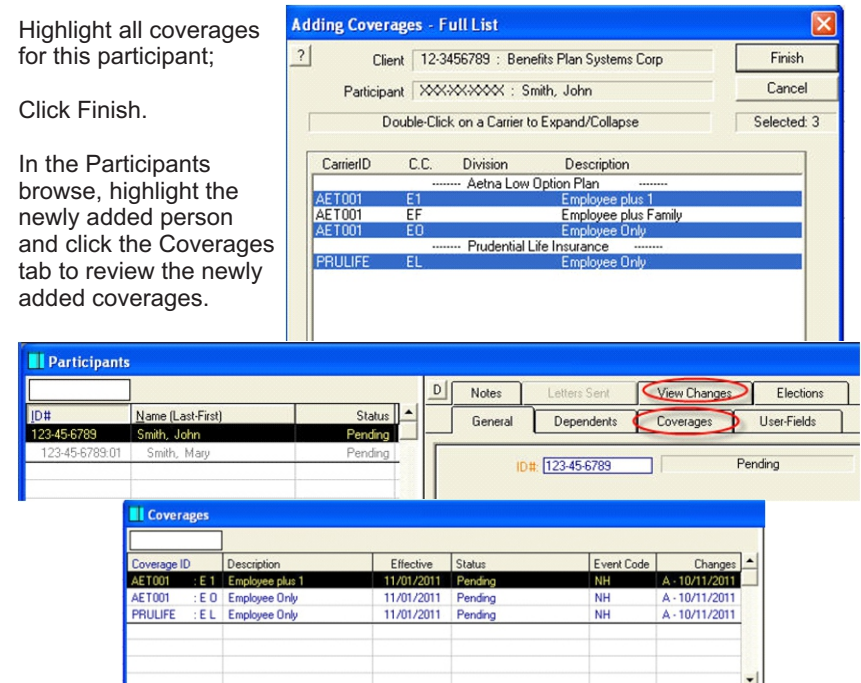
## Step 6b - Adding Coverages

Once you finish adding dependents, the Adding Coverages pop-up will appear listing any coverages available for the newly added participant, which will include the coverages you added in Step 4 and 5.

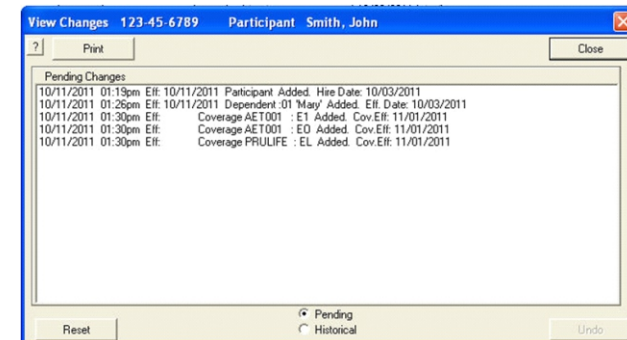
Highlight all coverages for this participant;

Click Finish.

In the Participants browse, highlight the newly added person and click the Coverages tab to review the newly added coverages.



Click on the View Changes tab in the Participants browse to review the changes for the newly added person.



**Repeat steps 1-6 above to add more participants into the system.**  
See the SPECIAL FEATURES AND FUNCTIONS section in the back of the guide regarding the import of large numbers participants.



## C Processing

Once you are done inputting Participants, you will want to *Process* the data. During Processing, the system evaluates all of your file data, completing required items. For example, if your file contains a new hire an Initial COBRA Notice would print, if there is an employee who has been terminated, then a Certificate Of Coverage would print.

You can process all the records in the system at once or process all the records for one Category or even process just one participant's records.

You can also organize the processing to perform specific items on a given day. For example, schedule Notification Letters to print on a specific day of the week and schedule the process to print Terminations on the last day of the month.

### Step 7- Start the Processing

**Before we start Processing,** let's select a printer for your EasyCert output. In the main program window, click the **Printers** button.

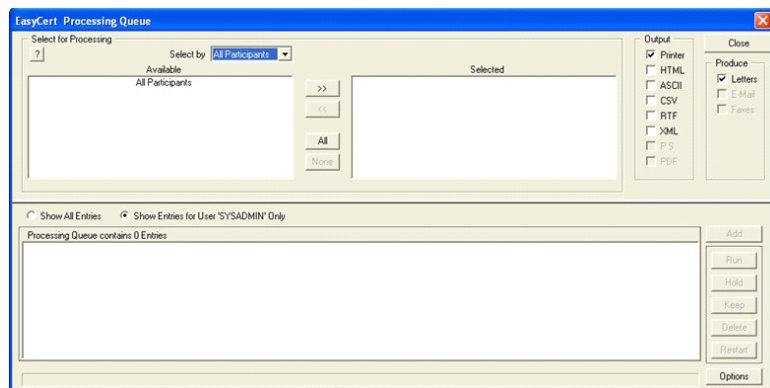


This will bring up the Printer Select window.



Choose your printer in the pull-down (If it is not listed, select *AVAILABLE* and Add New). Select the right printer, click *Set as your Default Printer* and OK.

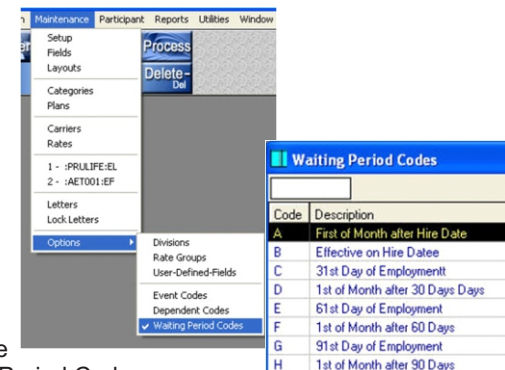
**To start Processing,** make sure all other windows in the program are closed. Click Process. This will bring up the Processing Queue.



## Waiting Periods

Waiting or probationary periods must be reported on Certificates of Coverage. EasyCert can automatically calculate any waiting period and the system is shipped with a number of standard waiting periods.

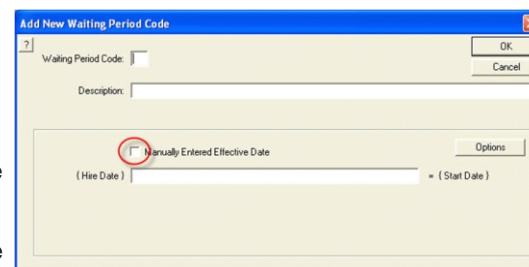
To see the codes go to the Menu Bar; click Maintenance and Options; select Waiting Period Codes.



You can also add your own Waiting Period Codes, if the pre-defined codes do not meet your needs.

To add your own code, open the Waiting Period Codes browse and click on the Add+ button or right click in the browse and select Add.

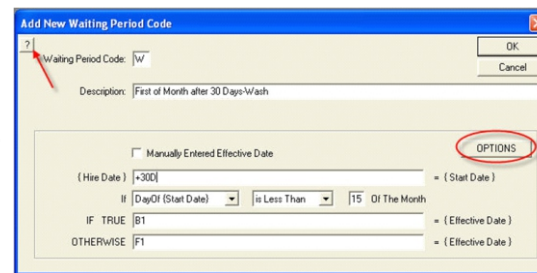
The Add New Waiting Period Code window allows you to set the parameters for your new code.



You can check the box to Manually Enter the effective date when using this code or use the system's special date operators to customize waiting period calculations.

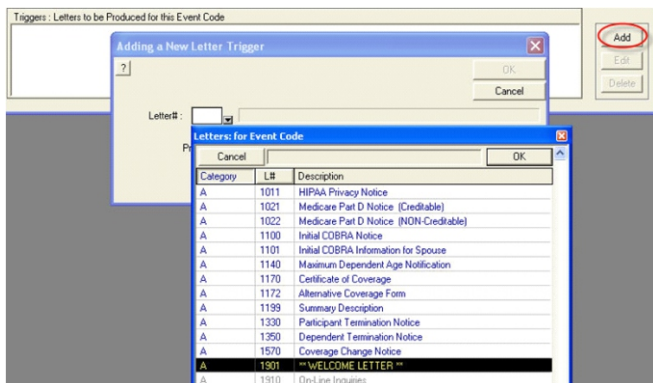
For example, suppose a new hire does not qualify for benefits until they are in their second month and you want to use a "wash" method to calculate their effective date. Thus, when the start of benefits date falls before the 15th of the month, the effective date will be the first of the same month (use operator B1). If start date is after the 15th, the effective date will be on the first of the next month (use operator F1). *Click on Options and ? for help on using operators.*

Custom Waiting Period Codes allow you to define a wide variety of waiting period calculations, from manually entered dates to complicated "wash" methods.

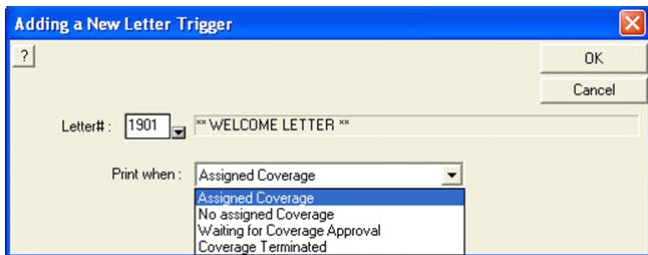


## Event Codes (continued)

Note how the NH code is defined - it is **Used As** an Enter Code (when a person enters the company); the system will **Use Waiting Periods** when processing this person; this code applies to **Active Employees**. This New Hire event code will **Automatically Produce** the letters checked.



In the Adding a New Letter pop-up, select the letter to add and **when** in the processing to print the letter. Click OK to save the letter and click OK to save your changes to NH.



The next New Hire (with NH code) will be sent an Initial Cobra Notice, a Welcome Letter and a Summary Description when processed.

Using the pre-defined event codes or by creating your own event codes, it is easy to administer all the letters and notices required for almost any situation.

Event codes assure that every proper notice or form is automatically output, to every affected person, at just the right time. A full audit trail is automatically maintained so you have a record of all items sent to your participants.

The Processing Queue window is divided into 3 sections:

**Available** section displays groups ready for processing;

**Selected** section displays groups selected for processing;

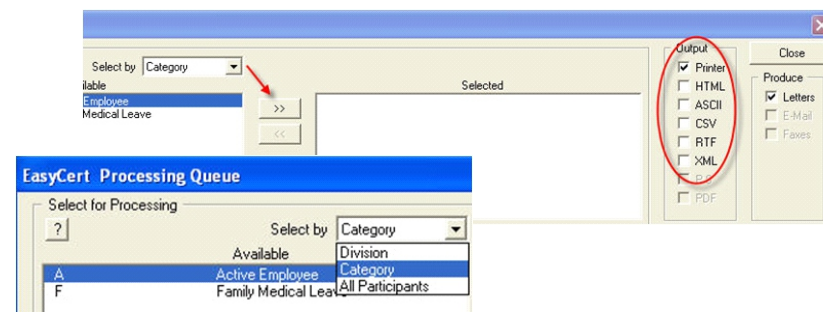
**Processing Queue** section lists processing jobs that are ready to begin or that are currently being executed.

First, pull down the **Select by** menu and choose -

**Division:** to process all the data records for 1 division.

**Category:** to process data records for 1 category (Active, Family Leave, etc)

**All Participants:** to process all the data records in the system.



**NOTE:** You can also process a single individual through the People browse. Highlight the participant, right click and select **Process this Participant...**

Select Category for now; you will see all the Categories listed in the **Available** box. Highlight "Active Employee".

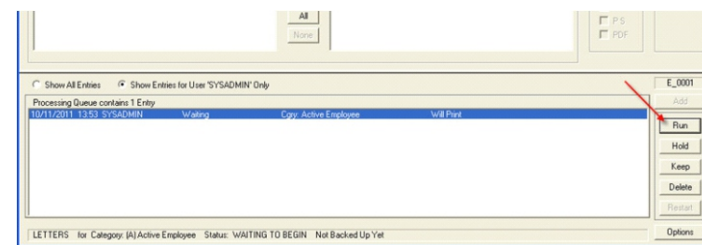
Click the >> button to move the selection to the **Selected** box.

Under **Output**, you can select the format of your letters and documents; send them directly to the printer or create any of the file types listed. Select Printer for now.

Click Add to move the "Active Employee" to the **Processing Queue**.

You are now ready to process all of these participants; since the person was added in the "Pending" state, the process should produce an Initial Cobra Notification Letter.

Click Run; click OK in the Processing Date pop-up to process.



The process will complete in a few seconds; once complete, the entry will be removed from the Processing Queue. Your printer should have produced a Initial COBRA Notice ready to be sent to your participant. You can now Close the Processing Queue window.

Note: The letters and forms produced for the Quick Start are the default formats. See the SPECIAL FEATURES AND FUNCTIONS section in the back of the guide for more on Processing and Letters & Notices.

You can now enroll the participant for coverage or use any of the various utilities EasyCert provides, including administering the records for employees who are terminated or who take Family Leave.

## Other Administration Utilities

To enroll a participant for coverage, click on the People button; highlight the participant that was just processed. Note that the participant's status is "Pending" and that the tabs show other information about the participant such as how many letters have been sent to the person.

ID#	Name (Last-First)	Status
123-45-6789	Smith, John	Pending
123-45-6789-01	Smith, Mary	Pending

NOTE: In the Letters Sent tab you can view or reprint any of the participant's letters.

### Let's enroll the participant:

Right click on the participant and select Enroll...

The Participant Enroll window will display the participant's dependents and a list of coverages to choose from.

Highlight the dependent and then, in the COVERAGES list, highlight the coverages (you can select 0 or more) for this participant and the selected dependent.

Select AET001:E1 and PRULIFE :EL for this participant and spouse. Click OK. Confirm if you would like to delete the unselected coverages or leave them alone. Click OK.

Notice that the Participant and Coverages are now Active.

## SPECIAL FEATURES AND FUNCTIONS

*You have completed the Quick Start Instructions!*

The remainder of the guide highlights other special features and functions in *EasyCert*.

## Event Code Driven

The EasyCert system is driven by user definable "Event Codes". The system already contains several pre-defined Event Codes - to see these, go to the Menu Bar; click on Maintenance and Options. Select Event Codes.

Every person entered into the system is given an Event Code which determines the administrative tasks that must be completed by the system.

Code	Description	Category	Used As	Waiting?
NH	New Hire	Active	Enter	Y
OE	Open Enrollment	Active	Enter	N
RC	Requested Change	Active	Exit	N
RH	Re-Hire	Active	Enter	N
RW	Re-Hire w/ Waiting Period	Active	Enter	Y

For example, if you assign a new hire the predefined event code NH (New Hire), then that person will receive an Initial Cobra Notification.

This is the default setup for the NH event code. But suppose that you also want each new hire to receive a Welcome Letter and Summary Description of the available plan choices. You can either modify the NH event code to issue these items as well, or you can create a new event code that issues all three, leaving the default NH code intact.

(Whether you modify the NH code or create your own event code, the Welcome Letter and Summary Description must be created first. See the **Letters and Notices** section to see how you can create custom documents).

To attach the Welcome Letter and Summary Description to the NH event code, Edit the NH Event Code and click the Add button in the Event Code pop-up.