Group Electronic Onboarding (GEO)

FREQUENTLY ASKED QUESTIONS

FEBRUARY 2023

Contents

Plan Administrators

How do I access the Electronic Onboarding tool?

If your organization has chosen to offer Electronic Onboarding, our Client Experience Team will enroll your policy in the electronic onboarding tool and send Plan Administrators an email with the subject **"Gain access to your dashboard".** Open this email and click the **"Continue"** button to set up access to the member enrollment dashboard.

My one-time passcode expired, what should I do?

Return to the first email you received with the subject line **"Gain access to your dashboard"**. Select the **"Continue"** button. After the one-time passcode window opens, click **"Get Passcode Email"** to generate a new one-time passcode Each passcode is only valid for 5 minutes**.**
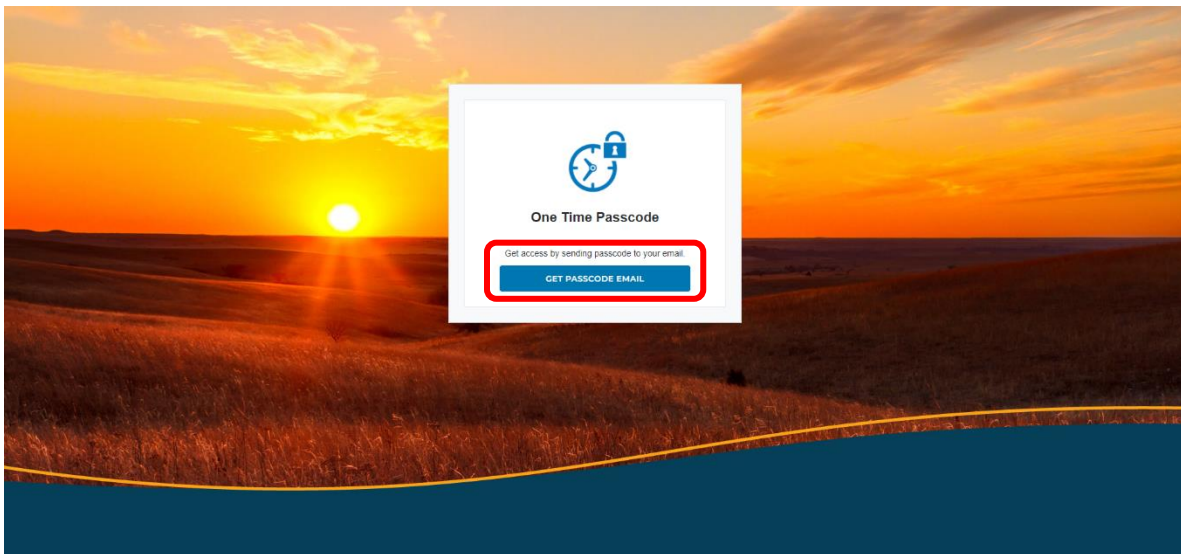
I lost the link to the dashboard. What should I do?

Go to your email inbox. Open the email with the subject **"Gain access to your dashboard".** This is the same email used to gain access to your dash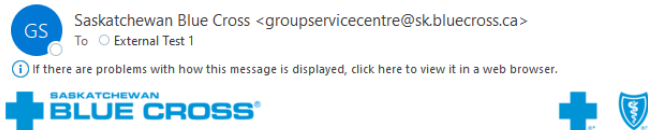board the first time. Click **"Continue"**, request a new one-time passcode and validate. After completing the validation, you will regain access to your dashboard.

What happens if my link to the dashboard expires?

If your link to the member enrollment dashboard expires, you will be redirected to the following page. Please follow the instructions on this page to regain access.
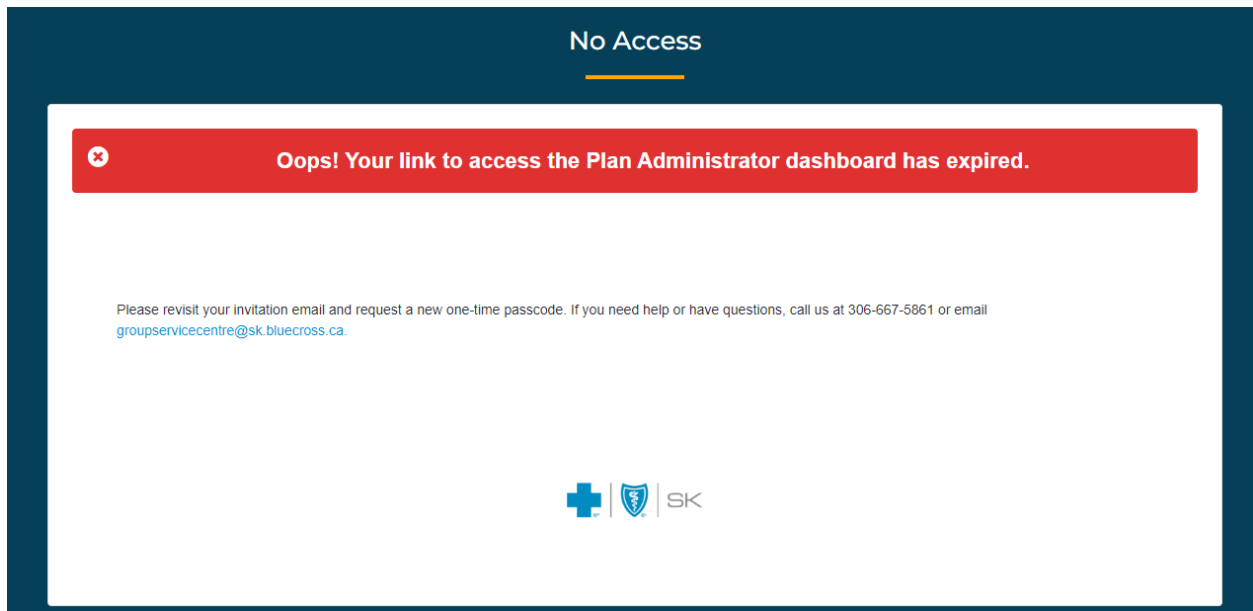
What file formats can I use to upload multiple employees at once?

You can use either an Excel file or a .CSV file to bulk add employees to the member enrollment dashboard. The system will default to Excel files.

What are the required formats for employee information?

When entering employee information, the required formats are as follows.

- Dates: DD/MM/YYYY
- Decimal places: the following fields allow for decimal places
    - Earnings
    - Hours Worked per Week
    - PSA Bank Load
    - HSA Bank Load

Example: When entering data for Hours Worked, you can include up to two digits after the decimal point: 37, 37.5, or 37.25.

How do I know if I entered all of my employee data correctly?

Once all data for the employees have been entered in the correct format and there is no missing data, each employee line will show the status as **"Validated"**, and the status notification will show "…validation complete with 0 errors.". If an error exists, the employee line will show the status as **"Error"**, and list the number of errors that require a fix. Select **Edit** beside the corresponding employee to review and correct the required information.

How do I search for an employee?

Using the search bar at the top of the upload list, you can search for an employee by adding a first name or last name (but not both).

Do my employees have to submit their application through the Electronic Onboarding tool?

If your organization has chosen to offer the Electronic Onboarding option for your employees, they can submit their applications using the online tool or with a paper application. If you have chosen not to offer the Electronic Onboarding option, employees will need to submit using a paper application.

How can I locate the overall enrollment status?

The number of employee emails and completed applications will appear at the top of the dashboard to assist with monitoring the enrollment status within the organization.

How do I know if my employees have completed their application?

After an email has been sent to the member with their application, the employee status will show as **"Sent"**. Once an employee has submitted their completed application, their status will show as **"Complete."**

Can I edit the employee's information after they have submitted their application?

If an employee's employment information on an application needs to be corrected, select **Details** beside the corresponding employee to review and correct the required information.

How do I resend an enrollment invitation email?

If an employee has lost the link to the application and requests a new email, click the **"Resend"** button for that employee. **Note:** The system will create a copy of the original application and requires that the employee now use a one-time passcode since some information may already have been entered. The employee will receive instructions to follow to use their one-time passcode to retrieve and continue their application.

How do I remove an employee?

If you need to remove an employee from your enrollment dashboard, click the red **"X"** on the corresponding employee's record. On the confirmation popup, click **"Yes"** and the employee will be removed from the dashboard.

How do I submit my final list of employees to complete the enrollment?

When all employees have submitted their applications, the **"Submit Final List of Employees"** button will appear for plan administrators. At this point, you can click the **"Submit Final List of Employees"** button to complete the onboarding of your employees to your group benefits plan.

Can I register new employees using the electronic onboarding process after our plan is active?

At this time the electronic onboarding tool is only available for employee set up during the initial creation of the policy.

Plan Members

How are error messages handled when information is missing or invalid?

If one or more required fields contains an error or is blank, and the **"Next"** button is clicked, the corresponding field-level errors as well as a page-level error are displayed.

I lost the link to my application. What should I do?

Return to your inbox and find the email with the subject **"Complete your benefits application."** Open this email and click the **"Let's get started"** button to resume your application.

If you've accidentally deleted this email or the link has expired, please ask your plan administrator to resend your invitation email. You will need to obtain a one-time passcode and validate it to access your profile again. When the invitation arrives, the subject line will read **"Make modifications to your benefits application"**. Open the email and click the **"Continue"** button.
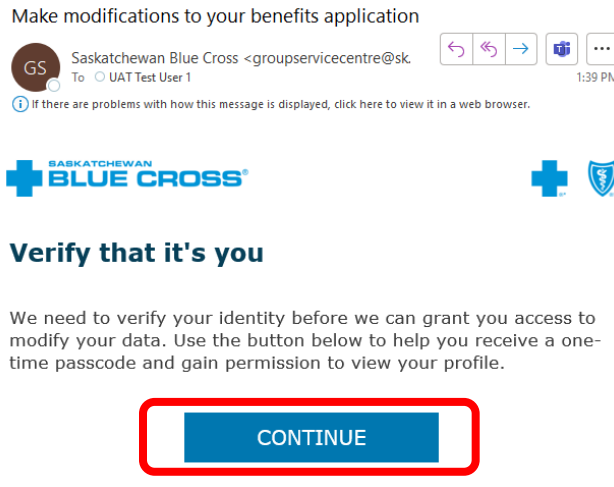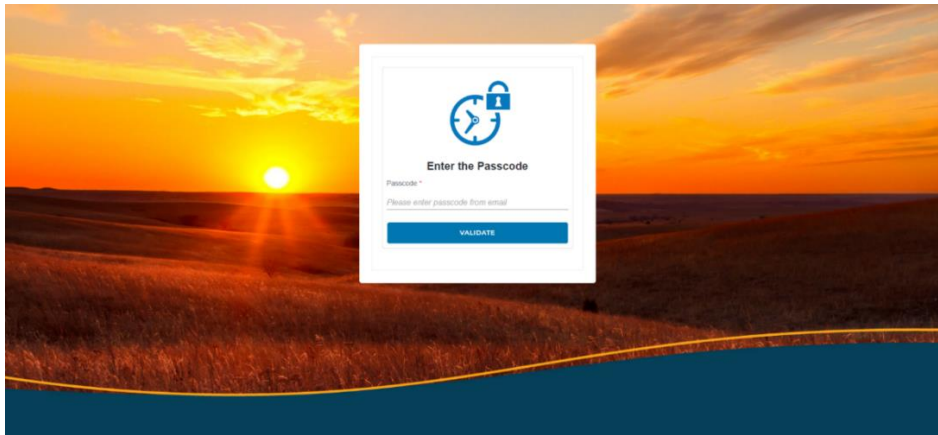

A one-time passcode window will open. Click **"Get Passcode Email"** to generate a one-time passcode to open your application.
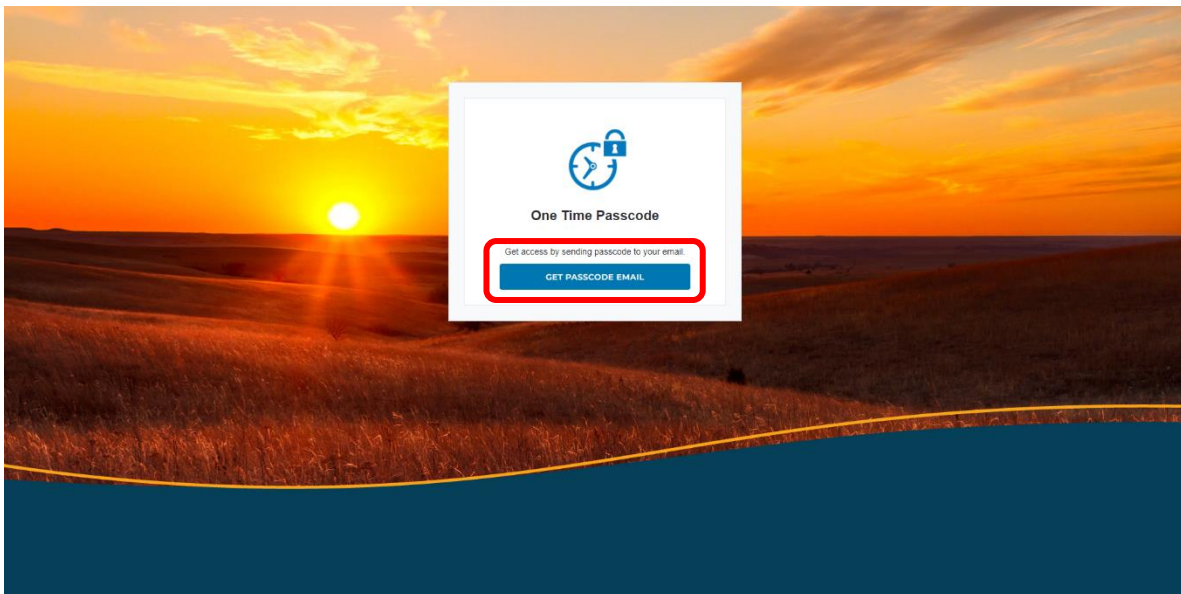
On the validation screen, you'll be asked to enter your one-time passcode. Leave this tab open and return to your email inbox to retrieve your one-time passcode.

Return to your email to find your one-time passcode. Open the email with the subject **"Your one-time passcode to view the dashboard"**. Copy the 6-digit passcode from the email.

Return to the one-time passcode validation screen. Paste the passcode in the input field and click the **"Validate"** button. Upon successful validation, you'll be redirected to view your member enrollment application.
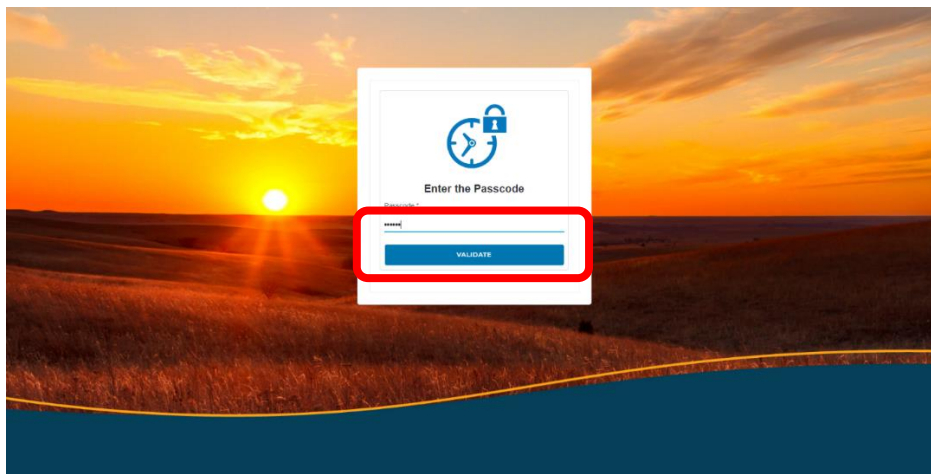
I'm not able to complete my application right now. Can I come back another time to finish?

At any time, you can return to your inbox and find the email with the subject **"Complete your benefits application."** Open this email and click the **"Let's get started"** button to resume your application.

If you've accidentally deleted this email or the link has expired, please ask your plan administrator to resend your invitation email. Continue by following the instructions in the above **I lost the link to my application. What should I do?** section.

Receiving a reminder email

If you don't return to complete your benefits application within 24 hours, you will receive an email reminding you to complete your application. The email will include a replacement link to complete your application and a notice about the number of hours remaining to submit your application. Click the "Complete Enrollment" button in the reminder email to pick up your application where you left off.

How do I add or remove a dependent?

After completing your information, the system will provide the Dependents page to enter any dependent details. To add a spouse or dependent to your application, select **Add Spouse / Dependent** and enter the corresponding information in the required fields. Select **Save** to add the family member to the application. Multiple dependents can be added to an application. If a dependent needs to be removed from the application, select the red **"X"** beside the corresponding dependent line.

How is a dependent child classified?

In order to be listed as a dependent on your plan, dependent children must:

- Be dependent upon the employee for financial care and support, and
- Not legally married or in a common-law relationship that is one full year or more in duration, and
- Be less than 21 years of age; or if 21 years of age but less than 26 years, they must be attending an accredited educational institute, college or university on a fulltime basis

Unmarried children over 21 years of age can also qualify as dependents if they are dependent upon the member by reason of a mental or physical disability and have been continuously disabled prior to turning 21 years old. Unmarried children who became totally disabled while attending an accredited educational institution, college or university on a full-time basis prior to their turning 26 years old and have been continuously disabled since that time shall also qualify as a dependent.

How do I add or remove a beneficiary?

If your group plan provides life benefits, the system will provide an option to add beneficiaries. After adding the Dependent information, a Beneficiaries page will be displayed. Select **Add Beneficiary** and complete the required fields. After selecting **Save Beneficiary**, the beneficiary will be added to the application. If the beneficiary needs to be removed from the application, select the red **"X"** beside the corresponding beneficiary line.

How do I adjust the percentage allocation for a beneficiary?

If the percentage allocation for a beneficiary needs to be adjusted, enter the new percentage amount in the corresponding beneficiary line and select the **"Save"** button beside the percentage to record the changes.

How can I choose to waive my benefits?

If you listed your marital status as **Legally Married** or **Common-Law** and your spousal coverage is already in force, you will have the option to waive any of your benefits. The option to waive your benefits will appear on the last screen before your final acknowledgement and consent. If you choose to waive a benefit, the application will request you specify which benefit you would like to waive and which dependents you would like to waive the benefits for.

How can I correct my information after I have submitted my application?

Once you have completed your application, please contact your Plan Administrator for any corrections that need to be made.