Electronic Onboarding

PLAN ADMINISTRATOR GUIDE

VERSION 4.0
NOVEMBER 23, 2022

Contents

Logging into the member enrollment dashboard

Plan administrator receives invitation to manage a newly created policy

After the Group Administration team has enrolled the policy, the plan administrator will receive 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.

Request a one-time passcode to login to the member enrollment dashboard

Upon choosing the Continue button, you'll be redirected to the login page to generate a one-time passcode to access your member enrollment dashboard. The page allows you to request and validate a one-time passcode for secure access.

Click **"Get Passcode Email"**. An email will automatically be sent to your email address to provide your one-time passcode. This page will redirect to the validation screen.
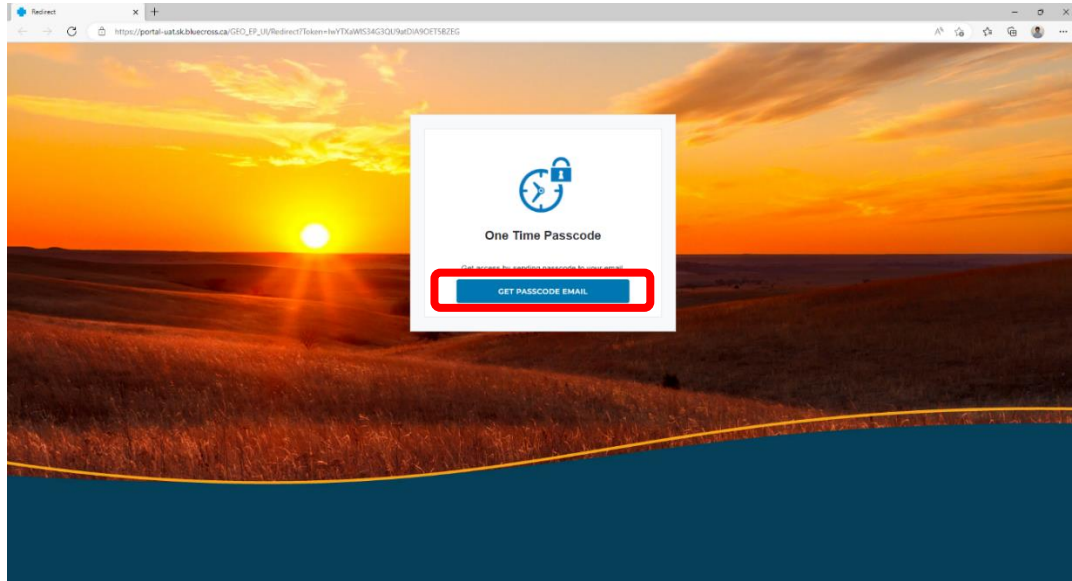
On the validation screen, you'll be asked to enter your one-time passcode. Leave this tab open and return to your email inbox to retrieve your one-time passcode.
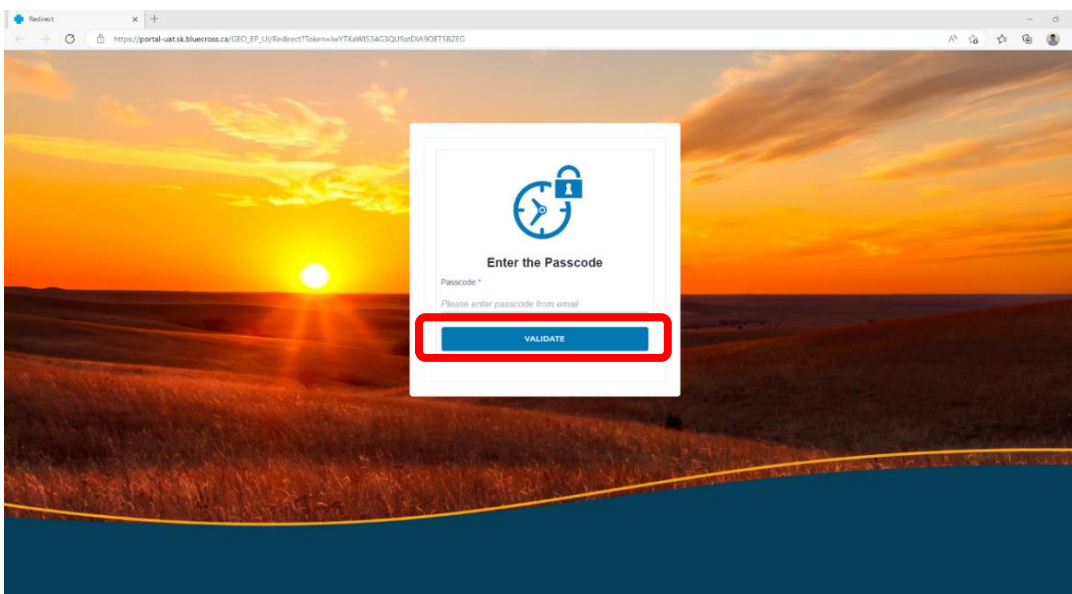
Return to your email to find your one-time passcode

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

Your one-time passcode to view the dashboard

GS Saskatchewan Blue Cross <groupservicecentre@sk.bluecross.ca>
To ○ External Test 1

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

SASKATCHEWAN BLUE CROSS®

Use the passcode to view your dashboard

652078

NOTE: This passcode will expire within 5 minutes.

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We're here to make it easy. Need help or have questions?
Call us at 306-667-5861 or email groupservicecentre@sk.bluecross.ca

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SK

Return to the one-time passcode validation screen. Paste the passcode in the input field and click the **"Validate"** button.
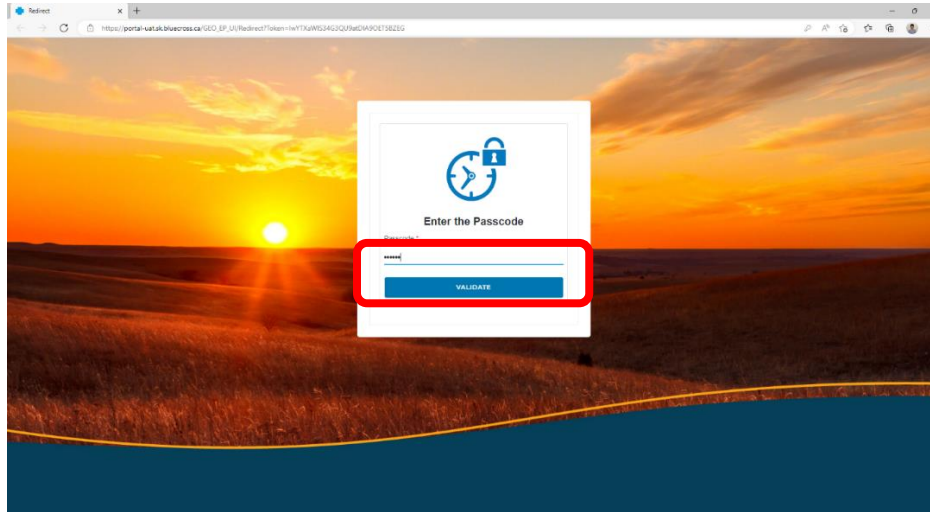
Upon successful validation, you'll be redirected to view the member enrollment dashboard.
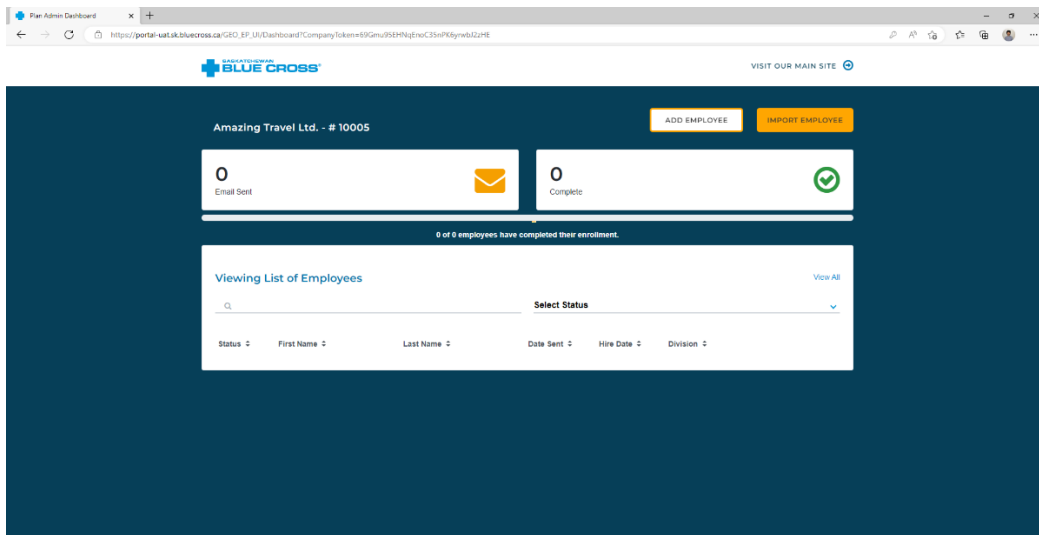
*NOTE: If you ever lose your link to access your member enrollment dashboard, return to the first **"Gain access to your dashboard"** email and repeat the above process.*
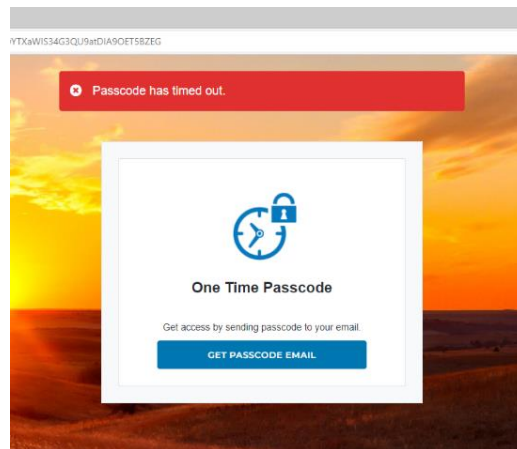
Troubleshooting the login process

How are error messages handled when the passcode is invalid or expired?

If you enter an incorrect passcode, the following error message will be displayed.
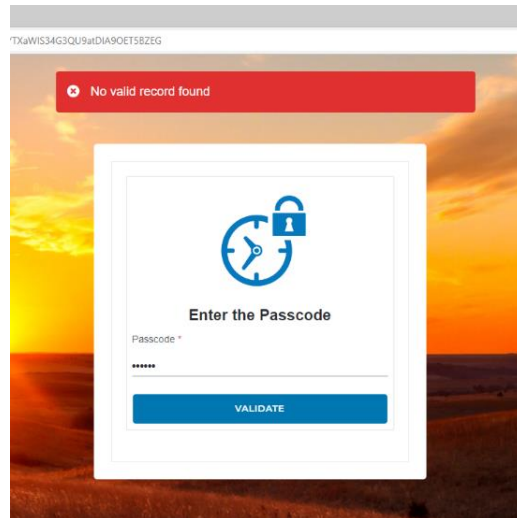
Each passcode is only valid for 5 minutes. **If you enter an expired passcode,** the following error message will be shown.

Adding employees

There are two ways to add employees to the enrollment dashboard: using a **"bulk add"** process or by **manually entering** employee information.

Manually adding employees

To add an employee manually, click the **"Add Employee"** button.

A dialogue box will open with required fields to add an employee's information. Fill in all the required fields on the form. Once the data entry is complete, click the **"Save"** button.

The new employee will appear on your dashboard.

Troubleshooting the manual add process

How are error messages handled when no data is submitted?
When one or more required fields are left blank and the **"Save"** button is clicked, a page-level error, as well as field-level error(s), will be displayed.

Bulk adding employees

You can use either an Excel file or a .CSV file to bulk add employees to the member enrollment dashboard.

Using an Excel file to add employees

The default selection is to use Excel.

Click the **"Download Template"** button to download the Excel template, then add your employees' information as per the format in the template.

Using a .CSV file to add employees

To bulk add your employees using a .CSV file, click the "Use CSV" button.

Click the **"Download Template"** button to download the .CSV template, then add your employees' information as per the format in the template.

Adding employee information and uploading to the member enrollment dashboard (using either Excel or .CSV)

The Excel or .CSV template will be pre-populated with simulated data to demonstrate how to complete the required information. Delete the simulated data before adding your employee information.

Email	FirstName	LastName	HireDate (DD/MM/YYYY)	Occupation	Division	Class	Earnings	PayrollNumber	HSABankLoad	PSABankLoad	HoursWorkPerWeek	EarningFrequency (one
example01@outlook.com	Mary Jane	Atkinson-Stuart	10/08/2013	Marketing Manager	012	1	87000	000843272	5000	4000	37.5	Annually
example02@gmail.com	Eric	O'Connor	22/04/2017	Web Designer	017	3	52.50	000843019	4000	2000	40	Hourly
example03@hotmail.ca	Mingze	Huang	07/07/2021	HR Recruiter	004	1	1275	000843597	4500	2200	38	Bi-Weekly
example04@yahoo.ca	Greg	Mitchell	02/01/2022	Accountant	006	2	5000	000843401	5050	3400	37.5	Semi-Monthly
example05@outlook.com	Gloria	Chen	26/11/2016	Web Developer	017	3	2200	000843393	4000	2000	40	Bi-Monthly
example06@gmail.com	Jeremy	Morrison	15/09/2019	HR Assistant	004	1	3500	000843694	4500	2200	40	Monthly
example07@hotmail.ca	Nancy	Olson	05/01/2019	Customer Representative	009	4	13000	000843009	4000	2000	38	Quarterly
example08@yahoo.ca	Kelly	Newman	18/10/2016	Marketing Director	012	5	62000	000843723	6000	4500	40	Semi-Annually
example09@outlook.com	John	Williams	05/01/2013	Accountant	006	2	850	000843683	5050	3400	40	Weekly

Required formats for employee information:

- The required date format is DD/MM/YYYY.
- Four fields allow for decimal places, which allow for data with 0, 1 or 2 digit decimals. These fields are:
  - 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.

After entering your data in the template, save your file. Return to the member enrollment dashboard. Click "Click to select an Excel/.CSV file" and choose your completed template.

Once your file has been added, click the orange Upload button.

If you accidentally selected the wrong file, you can click the blue Cancel button to remove the file and choose a different one.

The member enrollment dashboard will then upload the information in your template.

Some basic information about your employees will be displayed in a table. If all data has 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."

To see more details about a particular employee or to edit their information, you can click the **"Edit"** button. A popup will display the data details for the selected employee.

Close the popup once you are finished viewing or editing.

After your upload is complete, two buttons are displayed, with options to continue or cancel.

- Click the **"Continue"** button to proceed with the bulk addition of the employee records. An email will be sent to all employees inviting them to complete their online enrollment.
- Click the **"Cancel"** button to terminate the upload without sending an email invitation to the employees or saving the records. Your upload will not be completed and your screen will be redirected to the home page of the member enrollment dashboard.

After selecting **"Continue"**, an email is sent to each employee. Employees' status will be updated to **"Sent"** to indicate that their invitation email has been sent, and a notification will indicate the number of employees to whom an email was sent successfully. Click **"Back to Dashboard"** to return to the home screen.

The newly added employees now show up on your member enrollment dashboard.

Troubleshooting the bulk add process

How are error messages handled during bulk upload?
When the "Use CSV" switch is engaged but an Excel file is uploaded, or vice versa, an error message will be displayed. Ensure the type of file you want to upload is highlighted in Blue before uploading your file.

- Ensure **"Use Excel"** is blue if you want to use an Excel file.
- Ensure **"Use CSV"** is blue if you want to use a .CSV file.

If you encountered an error while uploading employees

If the spreadsheet contains errors such as missing data or incorrect formatting, an error message will appear after the upload indicating the number of employees whose information contains an error. Records in **"Error"** status must be corrected before clicking **"Continue"** or they will not be processed.


You can edit any employees whose status displays **"Error!"** prior to sending the enrollment email. Once all employees' status shows **"Validated"**, you can proceed with sending the enrollment invitation email.

> **NOTE:** You can proceed with sending the enrollment email without editing employees with errors by clicking the "Continue" button; however, enrollment invitation emails will only be sent to employees with a "Validated" or "Updated" status.
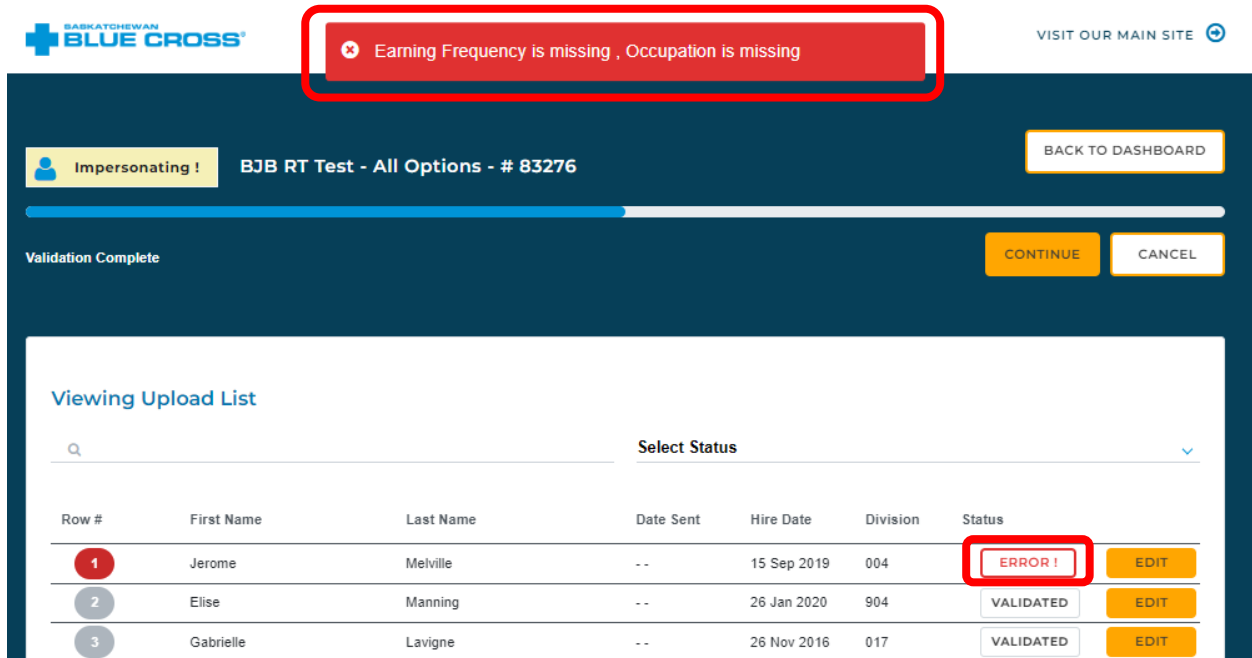
You can filter the list by Status to find all employees with the **"Error"** status.

You can also the search bar to search for an employee by adding a first name or last name (but not both).
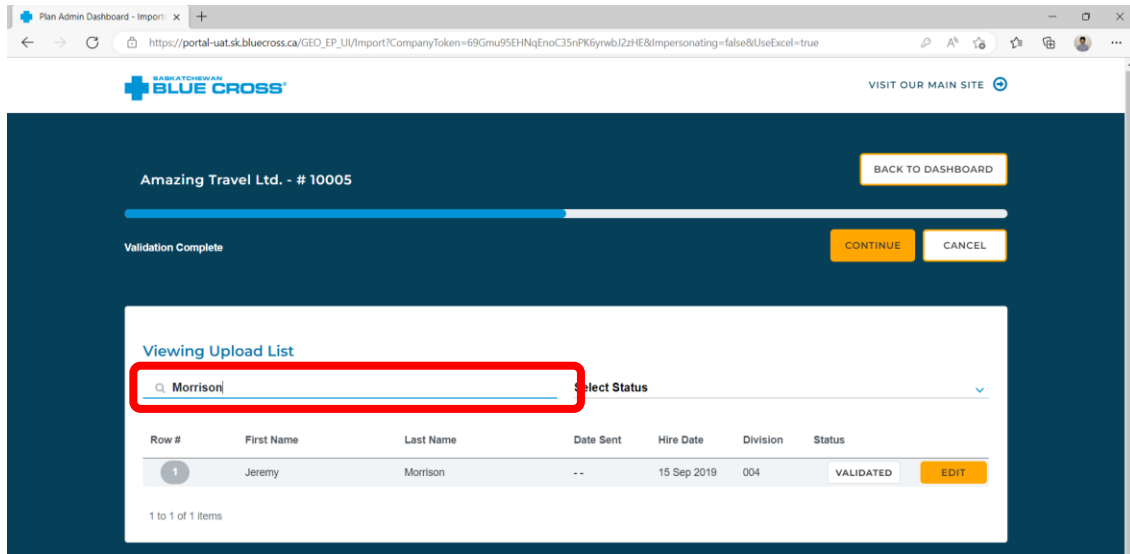
To view the specific error message(s) for a particular record, click the **"Error"** button. The error message will appear in a notification at the top of your screen.

You can update employee records with an **"Error"** status by clicking the **"Edit"** button.

EXAMPLE: The error below suggests two fields are blank. Fill in with data and click **"Save"**. After filling in the missing fields and saving changes, the employee's status will change from **"Error"** to **"Updated"**.

Using the member enrollment dashboard

As a plan administrator, you'll have access to the member enrollment dashboard. The enrollment dashboard allows the following:

- Keep track of the status of employees' enrollments
- Edit employees' details
- View the overall enrollment statistics of the policy
- Quick search and filter results

The enrollment dashboard also facilitates the following activities, which will be discussed in later sections:

- Resending emails
- Remove employees

Keeping track of enrollment status

The employees' basic information is displayed on the dashboard along with the current status, which is listed below.

Status	Description
Sent	An email has been sent to the employee.
Complete	The employee has completed the application.

The **"Date Sent"** column indicates when the enrollment invitation email was sent to the employee.

Editing employee details

Click the **"Details"** button to edit the employee's information.

In this example, the employee's last name is changed to Coleman. Click **"Update"** to save your change(s).

When the update is complete, a success message will be displayed at the top of your screen, and the updated information is reflected on the dashboard.

Viewing overall enrollment statistics

The section circled in red shows the overall enrollment statistic within the organization. It shows how many email invitations have been sent and how many employees have completed their application. There is also a progress bar, indicating the percentage of completion by employees.

Searching and filtering results

The member enrollment dashboard supports searching for an employee on the search bar or filtering the results by selecting the status from the dropdown.

Searching by name: Add an employee's first or last name to search.

Viewing List of Employees						View All

Q Nancy		Select Status				⌄

Status ⇕	First Name ⇕	Last Name ⇕	Date Sent ⇕	Hire Date ⇕	Division ⇕	
Sent	Nancy	Olson	23 Nov 2022	5 Jan 2019	009	RESEND DETAILS ✖

1 to 1 of 1 items

Filtering by status: Choose the status you'd like to view.

Viewing List of Employees						View All

Q		Complete				⌄

Status ⇕	First Name ⇕	Last Name ⇕	Date Sent ⇕	Hire Date ⇕	Division ⇕	
Complete	Jeremy	Morrison	23 Nov 2022	15 Sep 2019	004	RESEND DETAILS ✖

1 to 1 of 1 items

Resending 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.

Viewing List of Employees						View All

Q		Select Status				⌄

Status ⇕	First Name ⇕	Last Name ⇕	Date Sent ⇕	Hire Date ⇕	Division ⇕	
Sent	Gloria	Chen	23 Nov 2022	26 Nov 2016	100	RESEND DETAILS ✖
Sent	Mary Jane	Coleman	23 Nov 2022	10 Aug 2013	012	RESEND DETAILS ✖
Sent	Mingze	Huang	23 Nov 2022	7 Jul 2021	004	RESEND DETAILS ✖
Sent	Greg	Mitchell	23 Nov 2022	2 Jan 2022	006	RESEND DETAILS ✖

Removing an employee
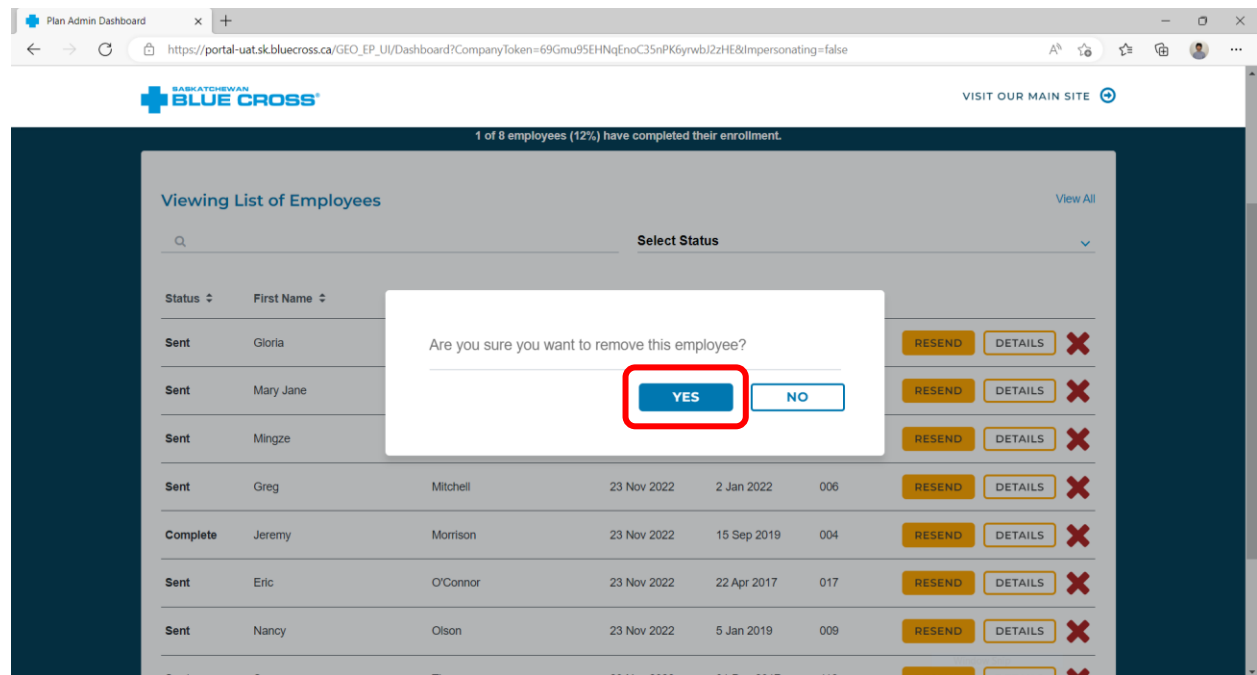
If you need to remove an employee from your enrollment dashboard, click the red "X" on that employee's record.

A confirmation popup will be presented. Click **"Yes"**.

After selecting Yes, the employee will be removed from the dashboard.

Submitting your final list of employees and completing 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.
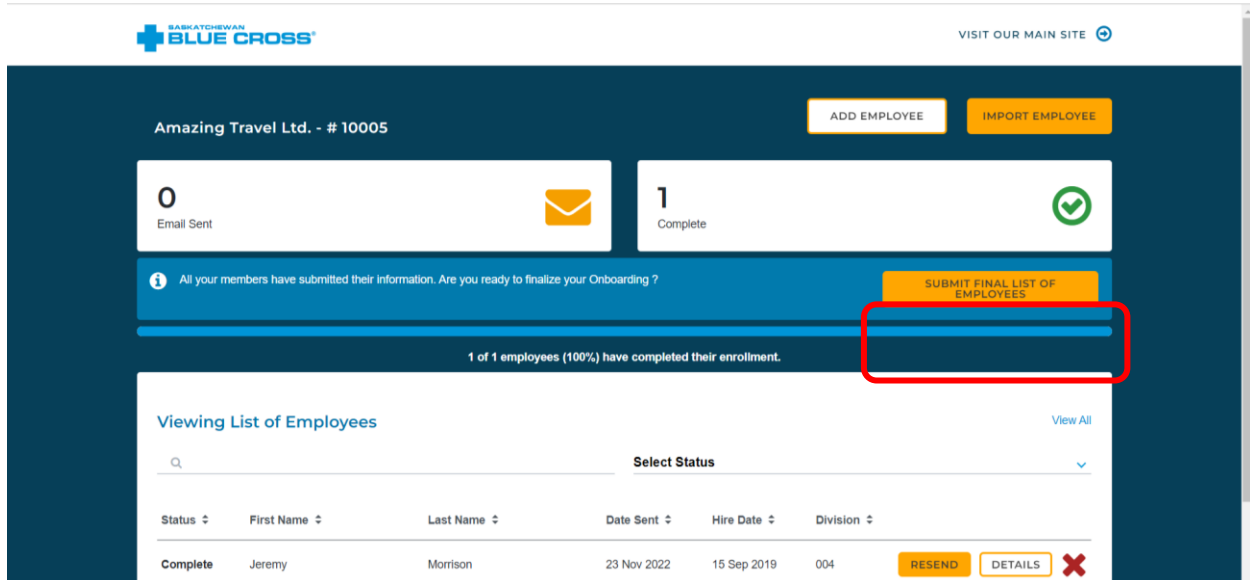
A confirmation message will appear to confirm your submission. Click **"Continue"** to proceed.
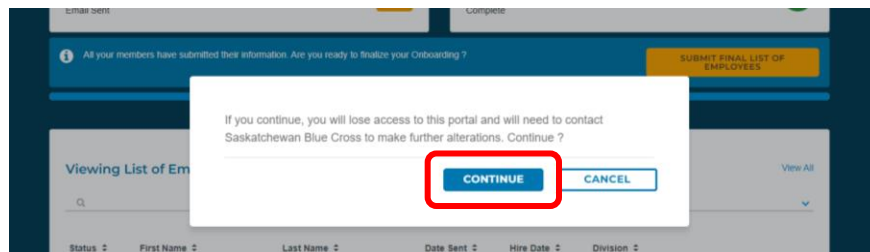

After clicking the **"Continue"** button, you will be redirected to the following page. Note that the submission process is tentative, and may be subject to change based on requirements.
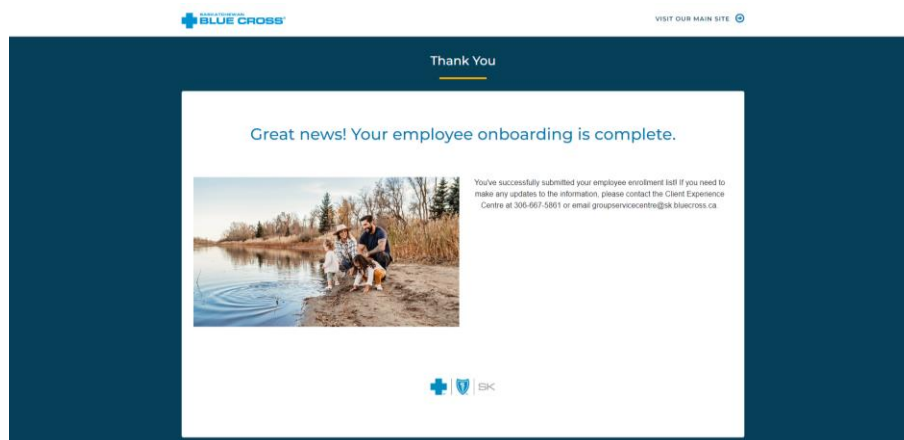
Frequently Asked Questions

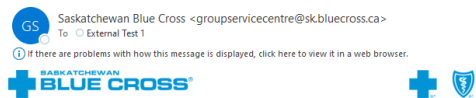## My one-time passcode expired, what should I do?

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. Continue by following the instructions in the above **Logging into the member enrollment dashboard** section**.**
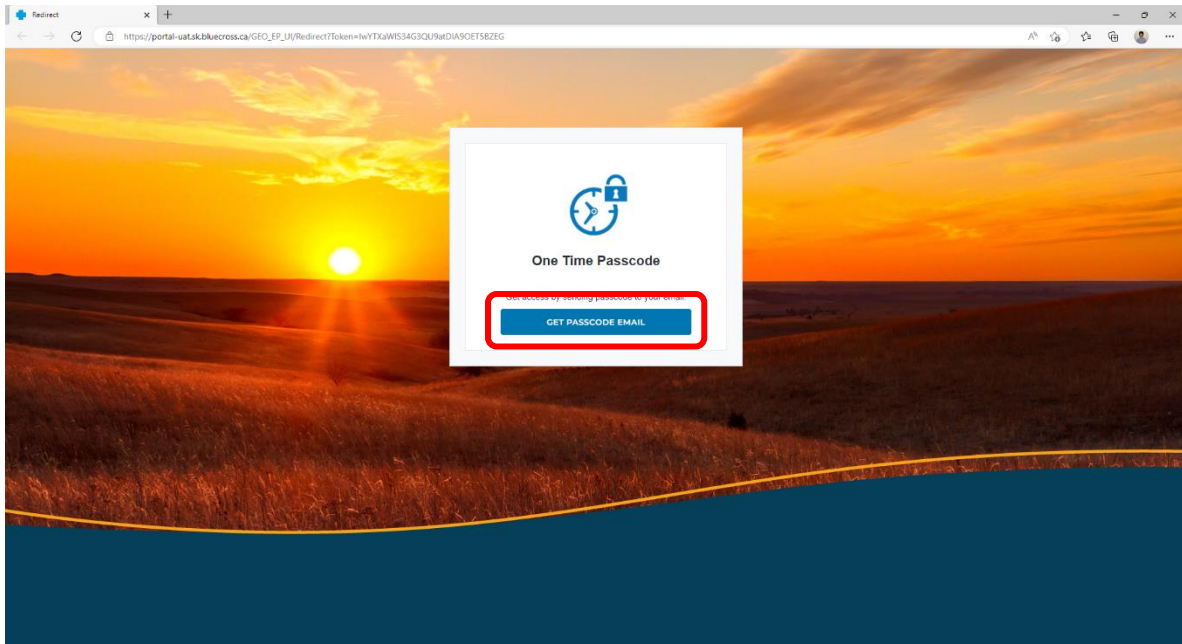
I lost the link to the dashboard. What should I do?

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 dashboard 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.

No Access

❌ **Oops! Your link to access the Plan Administrator dashboard has expired.**

Please revisit your invitation email and request a new one-time passcode. If you need help or have questions, call us at 306-667-5861 or email groupservicecentre@sk.bluecross.ca.