



# **Group Benefits Manager**

by

**Larsen Christopherson Benefits Group, Inc.**

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Your Benefits & Human  
Resource Information System  
...and more



# Benefits Administration Made Easy -- 24/7

- Benefit Plan Information
- Shared Files
- Track Notes (Administrator Level and Employee Level)
- Task Management and Calendaring with MS Outlook™ Integration
- Benefit Summary Report (*Hidden Paycheck*)
- Guided Employee Self Service
- Self Populating Enrollment Forms for Greater Accuracy and Efficiency
- One Click Census Reports (*with Export Options*)
- Payroll Deductions Reports
- Carrier Links
- Employee Notes
- Cobra Tracking
- Real-time Communication

# Employer Overview Page

EMPLOYER EMPLOYEES BENEFIT PLANS REPORTS

overview benefit groups divisions departments contacts manage users notes search notifications change log tasks pr

Greystone Airphones

**EMPLOYER INFO**

Status: Active  
Address: 1115 Division SW  
Elk Grove, CA 95826  
Sacramento County  
Phone: (616) 555-3785  
Fax: (616) 555-3785  
Email:  
Website:

Pay Periods: Weekly  
Paid Holidays: 7  
401(k) Matchings: 0 %  
Type of Business: Insurance Agency  
SIC: 1611  
Legal Entity: C Corporation  
Tax ID#: 0  
Primary Contact: Roberta A. v Adams  
Acct Managers: Troy R. Underwood, Sharon Creer, Martha Vandervort, Eugene

**ADMINISTRATION**

- Create Logins for all Employees
- Resend Logins to all Employees
- Enroll Multiple Employees
- Generate SmartForms for Multiple Employees

**NOTES**

[12/6/2005 12:08:27 AM] General (lamberth22hr) - Add this note and let's see how visible and easily accessible this information is.

[11/8/2005 9:56:03 AM] General (greyemployer) - test

[10/21/2005 10:03:42 AM] General (AJJohn) - test

[10/4/2005 11:15:04 AM] General (AJJohn) - HR person can see

[9/22/2005 5:19:41 PM] General (AJJohn) - employer can see

[9/8/2005 5:24:11 PM] General (greyemployer) - I am the employer

[9/8/2005 11:31:57 AM] General (greyemployer) - I am the employer

**SHARED FILES**

65VV-4.pdf  
Disability Info.pdf  
Employee Application.pdf  
Employee Performance Evaluation.pdf  
Family Care Medical Leave Policy.pdf  
Form I9.pdf  
GBM hr sellsheet.doc  
Handbook Benefit Manager.doc  
HSA Bank Applic.pdf

**BENEFITS**

Medical Plans	Type	Enrolled	Renewal	Start	End
Benefit Insurance - High	Custom	1	3/1/2006	3/1/2006	
Benefit Insurance - Blue Shield of Minnesota - PPO 4	Custom	0	4/1/2006	4/1/2006	
Benefit Insurance - California - \$30 Copay	Standard	5	3/6/2006		
Benefit Insurance - California - 3500 High Deductible (HSA Compatible)	Standard	0	9/1/2005	7/1/2005	
Benefit Insurance - California - Classic HMO	Standard	21	12/1/2005		
Benefit Insurance - California - PPO 2500 (123456)	Custom	1	2/1/2006	1/1/2001	

'One-Click' Email Blast creates login accounts for All Employees

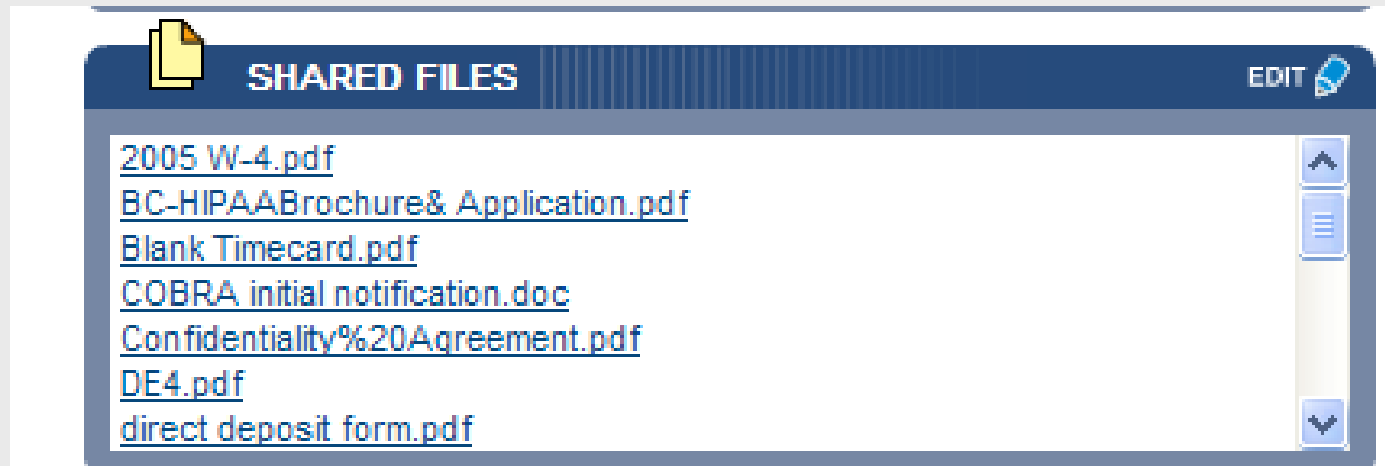
Batch Print all Benefit Apps. Ready to be signed by EEs

Documentation for Notes with automatic username and time/date stamp

Customizable access to company Documents

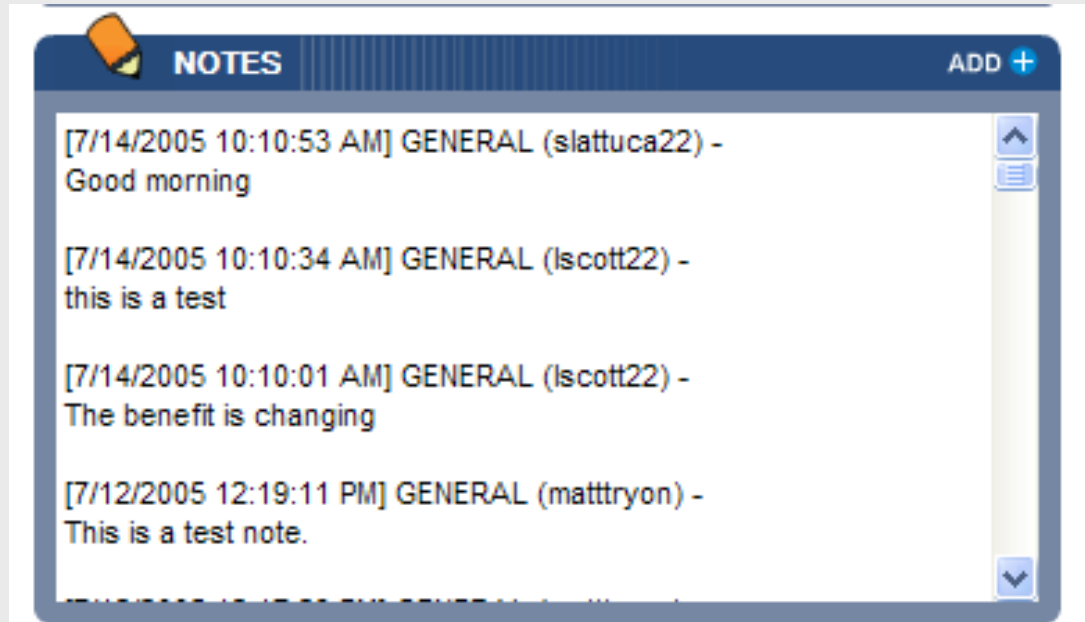
Overview of Benefit Plans

# Shared Files



- ✓ **Employee Access to Important Documents and Forms**
- ✓ **Unlimited Number of Files and File Types**
- ✓ **24/7 Access**
- ✓ **Simple to Add or Change**

# Notes Tracking



- ✓ **Time and Date Stamped**
- ✓ **User Name Auto Entry**
- ✓ **Unlimited Characters**

# Employee Overview

BROKER EMPLOYER **EMPLOYEES** BENEFIT PLANS REPORTS

search add overview notes claims change log benefit summary

Greystone Airphones > Employees > Employee, Joe E

AAI

**PERSONAL INFO** EDIT

SSN: 987-78-9876 Title: Mr.  
 Birth Date: 1/1/1976 Age: 30  
 Married: Single Gender: Male  
 Height: 6'3" Weight:

**ADMINISTRATION**

- Terminate this employee
- Set this employee to InActive
- Remove employee from system
- Change mailing address to same as home address
- Change all dependents to same home address
- Disable User Login
- Resend password to employee

**EMPLOYMENT INFO** EDIT

Status: ACTIVE Manager: (none)  
 User Name: [cattlin@greystone.com](mailto:cattlin@greystone.com)  
 Full Time: True Job Title: Manager  
 Division: Orange County Benefit Group: Default  
 Hire Date: 7/2/2001 (4/4/2006) Department: Sales

**DEPENDENTS** ADD +

Spouse	Cindy Adams	<a href="#">remove</a>
Child	Susan Adams	<a href="#">remove</a>
Child	Nathan Adams	<a href="#">remove</a>
Child	Joseph Adams	<a href="#">remove</a>

**ADDRESS** EDIT

Home 998 Auroch Drive  
 El Dorado Hills, CA 95762  
 Home: (916) 552-2323 Work: (800) 551-1234  
 Mobile: Fax:  
 E-mail: [employee@lonestargroup.com](mailto:employee@lonestargroup.com)

**CONTACTS** EDIT

Susie Johnson  
 123 Dirt Rd. Compton, CA  
 (213) 555-1234

**BENEFITS**

Show All

Medical: \$15 PLAN

KAISER PERMANENTE.

Policy #: Member #: 92546  
 Start: 10/17/2004 End:

Status: EE+Family  
 Forms: Select Form...

Benefits:  
[\\$15 Plan 2006-Spanish.pdf](#)  
[\\$15 Plan 2006.pdf](#)  
[kaiser Copayment Plans 070105 thru 120105.pdf](#)

Employee Only:	\$232.10
Dependents:	+ \$671.00
Total Premium:	= \$903.10
Employer Pays:	- \$201.80
Employee Cost:	= \$701.30

Employee  
Picture &  
Personal Info.

Easy to Manage  
Divisions,  
Departments &  
Classes

Contact info.  
with Home and  
Mailing address

Access to ALL  
Benefits

Links to  
Insurance  
Co. websites  
& provider  
directories

Easy short-cuts  
for common  
administrative  
tasks

Dependant  
Tracking

Emergency  
Contact

Self-Populating  
Forms and Links  
to Benefit  
Summaries

Premium Rates  
with complete  
contribution  
breakdown for  
each plan

# Individual Benefit Summary Reports

## Greystone Airphones

### Employee Benefit Summary

#### Employee Information

Caitlin M Adams

**Address**  
998 Auroch Drive  
El Dorado Hills, CA  
95762

**Birth Date** 1/1/1976  
**Hire Date** 7/2/2001  
**Length of Service** 4 Years

**Dependents**  
Spouse - John Adams Sr.  
Child - Joseph Adams  
Child - john adams

#### Salary Summary

**Salary + PTO**

Salary (not including PTO and holidays)  
Paid Time Off (10 Days)  
Paid Holidays (0 Days)

**Total Salary**

**Employer Paid Taxes**

**Total Salary + Taxes**

Company  
Contribution

\$43,269.23  
\$1,730.77  
\$0.00

**\$45,000.00**

\$8,152.28

**\$51,152.28**

**Benefits Paid  
by Employer**

**Employer Paid  
Taxes**

#### Summary Of Benefits

Medical: Blue Cross of California - PPO 2500  
Dental: Ameritas Group - Dental HMO  
Vision: PacAdvantage - Vision 80/20  
Life: -  
LongTermDisability: Acordia of Calif. Ins. Svcs. - NY2 -  
employer disability  
Chiropractic: Landmark Healthcare - chiro  
Retirement: -

**Total Benefits Cost**

Employee  
Contribution

\$1,806.00  
\$600.00  
\$264.00  
\$0.00  
\$900.00  
\$300.00  
\$0.00

**\$3,870.00**

Company  
Contribution

\$4,062.00  
\$0.00  
\$0.00  
\$0.00  
\$0.00  
\$0.00  
\$0.00






**\$55,214.28**

**Total  
Compensation  
amount**

# Task Management and Integrated Calendaring

Request Meetings and  
Schedule Tasks

Export to MS Outlook

TASK MANAGEMENT <span>ADD +</span>							
 My Tasks  My Meetings  My Calls  Assignments  Calendar <span>Show Completed</span>							
Pri	Subject	Status	Requested By	Date Due	Time	Date Start	Date Complete
Med	<a href="#">demo</a>	Not Started	A J Johnson		12:00 AM		
Description:				Notes:	Location:		
Low	<a href="#">meet with Jan</a>	Not Started	A J Johnson	4/13/2005	12:00 AM		
Description:				Notes:	Location:		
Med	<a href="#">training</a>	Not Started	A J Johnson	4/27/2005	8:00 AM		
Description:				Notes:	Location:		
Med	<a href="#">Training</a>	In Progress	A J Johnson	5/6/2005	10:35 AM		
Description:				Notes:	Location:		
Med	<a href="#">demo today</a>	In Progress	A J Johnson	6/1/2005	10:10 AM	6/1/2005	
Description:				Notes:	Location:		



# Comprehensive Reports

EMPLOYER
EMPLOYEES
BENEFIT PLANS
REPORTS

logout help

reports

GROUP BENEFITS MANAGER

Greystone Airphones > Reports

AAI

REPORT LIST





Title	Description
Employee Census	Census information for selected benefit plan type.
Employee Census with Salary	Census information for selected benefit plan type including salary and SSN.
Employee Master Census	Census information for all benefit plan types.
Employee Plan Usage	List of employees and their enrollment for the selected benefit plan type.
Employee Payroll Deductions	List of employees and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Carrier	List of employees, grouped by carrier, and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Benefit Group	List of employees, grouped by benefit group, and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Division	List of employees, grouped by division, and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Department	List of employees, grouped by department, and their payroll deductions for the selected benefit plan type.
Employee In Waiting Period	Employees currently within their benefit group's waiting period.
Employee Address / Birthday List	Employee list with address and date of birth.
Employee Benefit Summary	Employee detail information, single page per employee.

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Release Date/Time: 4/25/2006 2:26:28 PM

# 'One-Click' Census Report

'One-Click' Export to Excel, Word or PDF

<div>  Export data to Excel            Export to Word            Export to PDF         </div>											
<div>  <div>1 / 2</div> <div>100%</div> </div>											
Greystone Airphones Life Census											
Name	M/F	DOB	Age	Hire Date	Plan	Status	Job Title	Salary	Unit	SSN	Zip
Adams, Caitlin	F	1/1/76	29	7/2/01	Ineligible	R	Manager	\$45,000.00	Yearly	000-00-0000	95762
Adams, Roberta	F	8/29/56	48	3/5/01	GE Group Life Assurance Company Group Term Life	A	Manager	\$60,000.00	Yearly	756-34-8765	95762
Coca, Lina	F				GE Group Life Assurance Company Group Term Life	A				--	89502
David, Jones	M	1/1/62	43	6/1/05	Not Selected	N	test	\$100,000.00	Yearly	111-22-1111	92660
Demo, Joe					Not Selected	N				--	
Demo, Sid					Not Selected	N				--	
Demo, Tom					Not Selected	N				--	
Dent, Mark	M	1/14/52	53	3/24/03	Group Life (Deleted)	A	Sr. Environmental Planner	\$35,000.00	Yearly	000-00-0000	95670
Diana, Hathorn		2/3/58	47		No Plans Available	N				--	32751
Doe, Bill	M	12/11/99	5		Not Selected	N				--	95465

Easy to Print

# Payroll Deduction Report

## (Exported to MS Excel)

Microsoft Excel - EmployeePayrollDeductions[1].xls									
File Edit View Insert Format Tools Data Window Help Adobe PDF									
Type a question for help									
E38									
	A	B	C	D	E	F	G	H	I
1	Name	Employee Only	+ Dependent Only	= Total Premium	- Employer Pays	= Employee Cost	Error Message		
2	Buck, Chuck	\$10.15	\$0.00	\$10.15	\$2.54	\$7.62			
3	Castelli, Terrance	\$226.20	\$379.52	\$605.72	\$236.54	\$369.18			
4	David, Jones a	\$181.15	\$223.85	\$405.00	\$123.00	\$282.00			
5	Dent, Mark	\$333.83	\$703.20	\$1,037.03	\$478.64	\$558.39			
6	Doe, Bill	\$126.92	\$162.09	\$289.02	\$244.96	\$44.05			
7	Doe, Jane	\$136.04	\$340.15	\$476.19	\$395.12	\$81.07			
8	Employee, Joe E	\$239.01	\$654.46	\$893.47	\$93.14	\$800.33			
9	Fall, Holly	\$190.62	\$0.00	\$190.62	\$83.77	\$106.85			
10	Fall, Matthew	\$128.88	\$348.92	\$477.81	\$111.00	\$366.81			
11	Hawk, Lori	\$192.65	\$241.29	\$433.94	\$0.00	\$433.94			
12	Howard, Bryan	\$33.23	\$0.00	\$33.23	\$5.08	\$28.15			
13	Hsu, Lambert	\$82.11	\$73.90	\$156.01	\$140.41	\$15.60			
14	John, Smith	\$131.54	\$258.46	\$390.00	\$116.08	\$273.92	2 of the plans in this Consolidated quote returned errors,		
15	Jones, Tommy	\$131.54	\$0.00	\$131.54	\$87.46	\$44.08			
16	Keys, Leslea K.	\$256.15	\$366.69	\$622.85	\$364.89	\$257.95			
17	Kosel, Sarah Jo	\$199.88	\$0.00	\$199.88	\$199.88	\$0.00			
18	Lastname1, Jeff	\$115.38	\$0.00	\$115.38	\$92.31	\$23.08			
19	Law, Joan	\$175.40	\$208.29	\$383.69	\$127.50	\$256.19	1 of the plans in this Consolidated quote returned errors,		
20	Lewis, Denise	\$207.69	\$0.00	\$207.69	\$90.12	\$117.58			
21	Mayer, Tom William	\$34.62	\$0.00	\$34.62	\$10.38	\$24.23			
22	Pitt, Brad	\$33.71	\$0.00	\$33.71	\$5.08	\$28.63			
23	Que, Suzy	\$186.42	\$341.22	\$527.63	\$25.04	\$502.59			
24	Robertson, Jeffrey G.	\$297.92	\$720.51	\$1,018.43	\$477.53	\$540.90			
25	Robertson, Lisa	\$207.69	\$0.00	\$207.69	\$90.12	\$117.58			
26	Robertson, Orville L.	\$485.77	\$490.85	\$976.62	\$460.73	\$515.88			
27	Robertson, Peter M.	\$223.97	\$575.46	\$799.43	\$608.90	\$190.53			
28	Robertson, Ted	\$139.62	\$0.00	\$139.62	\$69.81	\$69.81			
29	Rose, Michelle	\$125.54	\$340.15	\$465.69	\$395.12	\$70.57	2 of the plans in this Consolidated quote returned errors,		
30	Smith, Bob	\$14.31	\$0.00	\$14.31	\$5.08	\$9.23			
31	Smith, John	\$10.15	\$0.00	\$10.15	\$5.08	\$5.08			
32	Star, Lone	\$279.23	\$668.68	\$947.91	\$448.57	\$499.34			
33	Stark, Deborah	\$117.69	\$0.00	\$117.69	\$82.38	\$35.31			
34	Tester, Troy Robert	\$439.94	\$543.24	\$983.17	\$567.89	\$415.48			
35	Williams, Eva	\$139.73	\$0.00	\$139.73	\$98.19	\$41.54			
36	<b>Bi-Weekly Totals</b>	<b>\$5,834.67</b>	<b>\$7,640.94</b>	<b>\$13,475.61</b>	<b>\$6,342.13</b>	<b>\$7,133.48</b>	<b>Total Employees:</b>	<b>34</b>	
37									
38	Provided by: Broker			Page -1 of 1			4/19/2006 10:16:59 AM		
	Sheet1/								
	Ready						NUM		

**Audit Alerts**

**Cost Summaries**

# Carrier Reconciliation Report

## (Exported to MS Excel)

Microsoft Excel - EmployeePayrollDeductionsbyCarrier[2].xls								
File Edit View Insert Format Tools Data Window Help								
Type a question for help								
18 A B C D E F G H I								
1	Name	Employee Only + Dependent Only	Total Premium	Employer Pays	Employee Cost	Error Message		
2	Benicorp Insurance							
3	Lastname1, Jeff	\$200.00	\$0.00	\$200.00	\$200.00	\$0.00		
4	<b>Benicorp Insurance Monthly</b>	<b>\$200.00</b>	<b>\$0.00</b>	<b>\$200.00</b>	<b>\$200.00</b>	<b>\$0.00</b>	<b>Employees:</b>	<b>1</b>
5	Blue Cross of California							
6	David, Jones a	\$311.00	\$485.00	\$796.00	\$255.50	\$540.50		
7	Dent, Mark	\$465.00	\$776.00	\$1,241.00	\$332.50	\$908.50		
8	Doe, Bill	\$253.00	\$332.00	\$585.00	\$500.00	\$85.00		
9	Fall, Holly	\$341.00	\$0.00	\$341.00	\$170.50	\$170.50		
10	Keys, Leslea K.	\$227.00	\$240.00	\$467.00	\$213.50	\$253.50		
11	Law, Joan	\$302.00	\$432.00	\$734.00	\$251.00	\$483.00		
12	Lewis, Denise	\$368.00	\$0.00	\$368.00	\$184.00	\$184.00		
13	Robertson, Jeffrey G.	\$368.00	\$738.00	\$1,106.00	\$284.00	\$822.00		
14	Robertson, Lisa	\$368.00	\$0.00	\$368.00	\$184.00	\$184.00		
15	Robertson, Orville L.	\$775.00	\$600.00	\$1,375.00	\$487.50	\$887.50		
16	Robertson, Ted	\$251.00	\$0.00	\$251.00	\$125.50	\$125.50		
17	Star, Lone	\$341.00	\$701.00	\$1,042.00	\$270.50	\$771.50		
18	<b>Blue Cross of California Month</b>	<b>\$4,370.00</b>	<b>\$4,304.00</b>	<b>\$8,674.00</b>	<b>\$3,258.50</b>	<b>\$5,415.50</b>	<b>Employees:</b>	<b>12</b>
19	Kaiser Permanente							
20	Castelli, Terrance	\$210.00	\$377.00	\$587.00	\$0.00	\$587.00		
21	Employee, Joe E	\$232.00	\$671.00	\$903.00	\$201.80	\$701.20		
22	<b>Kaiser Permanente Monthly</b>	<b>\$442.00</b>	<b>\$1,048.00</b>	<b>\$1,490.00</b>	<b>\$201.80</b>	<b>\$1,288.20</b>	<b>Employees:</b>	<b>2</b>
23	PacAdvantage							
24	Hsu, Lambert	\$177.90	\$160.12	\$338.02	\$304.22	\$33.80		
25	Robertson, Peter M.	\$208.26	\$423.84	\$632.10	\$568.89	\$63.21		
26	<b>PacAdvantage Monthly</b>	<b>\$386.16</b>	<b>\$583.96</b>	<b>\$970.12</b>	<b>\$873.11</b>	<b>\$97.01</b>	<b>Employees:</b>	<b>2</b>
27	PacifiCare							
28	Doe, Jane	\$250.00	\$737.00	\$987.00	\$839.60	\$147.40		
29	Fall, Matthew	\$250.00	\$737.00	\$987.00	\$220.00	\$767.00		
30	Kosel, Sarah Jo	\$433.07	\$0.00	\$433.07	\$433.07	\$0.00		
31	Rose, Michelle	\$250.00	\$737.00	\$987.00	\$839.60	\$147.40		
32	Tester, Troy Robert	\$698.20	\$732.01	\$1,430.21	\$740.00	\$690.21		
33	<b>PacifiCare Monthly</b>	<b>\$1,881.27</b>	<b>\$2,943.01</b>	<b>\$4,824.28</b>	<b>\$3,072.27</b>	<b>\$1,752.01</b>	<b>Employees:</b>	<b>5</b>
34	<b>Monthly Totals</b>	<b>\$7,279.43</b>	<b>\$8,878.97</b>	<b>\$16,158.40</b>	<b>\$7,605.68</b>	<b>\$8,552.72</b>	<b>Total Employees</b>	<b>22</b>
35								
36	Provided by: Demo			Page -1 of 1			4/26/2006 8:36:21 AM	
37								

# Benefit Plans

Drill Down to Details

Enrollment Summary

BENEFIT PLANS <span>ADD +</span>				
	Provider	Plan Name	Plan Type	# Enrolled
ACTIVE	HealthNet	<a href="#">Elect Open Access 20</a>	Medical	5
ACTIVE	HealthNet	<a href="#">PPO Value 30 Plan</a>	Medical	4
ACTIVE	Kaiser Permanente	<a href="#">15-N HMO Plan</a>	Medical	7
ACTIVE	Nationwide Health Plans	<a href="#">NationwideHealth</a>	Medical	2
ACTIVE	GE Group Life Assurance Company	<a href="#">\$50 ded - 100/100/60 in - 100/80/50out - \$2000max</a>	Dental	39
ACTIVE	GE Group Life Assurance Company	<a href="#">Group Life (GE Financial)</a>	Life	38
ACTIVE	GE Group Life Assurance Company	<a href="#">Group LTD (GE Financial)</a>	LongTermDisability	36
	Blue Cross of California	<a href="#">PPO \$30</a>	Medical	0
	Blue Cross of California	<a href="#">Saver HMO</a>	Medical	1
	Guardian Life Insurance, Co.	<a href="#">DentalGuard Plan 596 VI w/Child Ortho</a>	Dental	0
	Humana	<a href="#">Dental Plus A 50/1,000</a>	Dental	0
	Humana	<a href="#">PPO Voluntary Dental</a>	Dental	0
	Jefferson Pilot	<a href="#">Indemnity Plan (100/80/50) 50/1,500</a>	Dental	1
	Assurant	<a href="#">Group Life (Fortis)</a>	Life	1
	Guardian Life Insurance, Co.	<a href="#">Group Life (Guardian)</a>	Life	0
	Guardian Life Insurance, Co.	<a href="#">Group LTD (Guardian)</a>	LongTermDisability	3

# Benefit Plan Details

## Plan Details

**OVERVIEW** EDIT

Provider: HealthNet  
 Plan Name: Elect Open Access 20  
 Plan Type: Medical  
 Renewal: 03/01  
 Start Date: 7/1/2002  
 End Date:  
 Policy Number: 8522BA (was 3178D)  
 Sub Type: HMO  
 Riders:

## Benefit Summary

**ADMINISTRATION**

[Delete This Plan](#)

**SCHEDULE OF BENEFITS** EDIT

[PacifiCare%20HMO15Schedule\\_of\\_Benefits.pdf](#)

**FORMS** EDIT

[Small Group Application](#)  
[Domestic Partner Affidavit](#)

## Enrollment Forms

## Detailed Rates

**RATES** ADD +

**Default Rate** edit delete

EE: 295.00  
 EE+Sp: 613.00  
 EE+Ch: 503.00  
 EE+Fam: 800.00

## Employer Contribution Settings and Benefit Group Management

**ELIGIBILITY**

Available to	Benefit Group	Contribution	Waiting Period	Rate	
<input checked="" type="checkbox"/>	Default	EE 90% / DP 90%	90 days (starting firstofmonth)	Default	<a href="#">edit</a>

**NOTES** EDIT

replaced Blue Cross



# Simplify

- Manage your business **more efficiently**
- **Save** expensive staff resources and **time**
- **Simple** to use, **easy** to implement
- Fully **HIPAA compliant**

**GBM** by Larsen Christopherson Benefits Group, Inc. will enhance your business without the large costs usually associated with software this **powerful**.

We look forward to serving you