

benefix

**Enrollment Quick
Start Guide**



Welcome to the Benefix Platform 🙌

Your insurance broker is now using Benefix to digitize your enrollment process. This means less time chasing paper applications from your employees and more time working on your business. 🌍

This guide will show you how to navigate the system and get your enrollment submitted quickly and pain-free.

Your Invitation

benefix

Welcome to Benefix!

You'll receive an invitation from your broker to create your account. This will allow you to collaborate on your group's enrollment digitally within Benefix.

Just click **"Sign In"** to create your password and you're ready to go!

Hi, Your Name!

Welcome to benefix



Your broker, Example Broker, is using benefix to make benefits easier than ever.

They created a Example Small Group LLC benefits portal just for you and your employees!

Please sign in to complete your profile and add your employees.

Sign in

Need to log back in?

Utilize [this link](#) to log back into your Benefix account

Forgot your password?

Reset your password by clicking on “**Forgot?**” in the password box

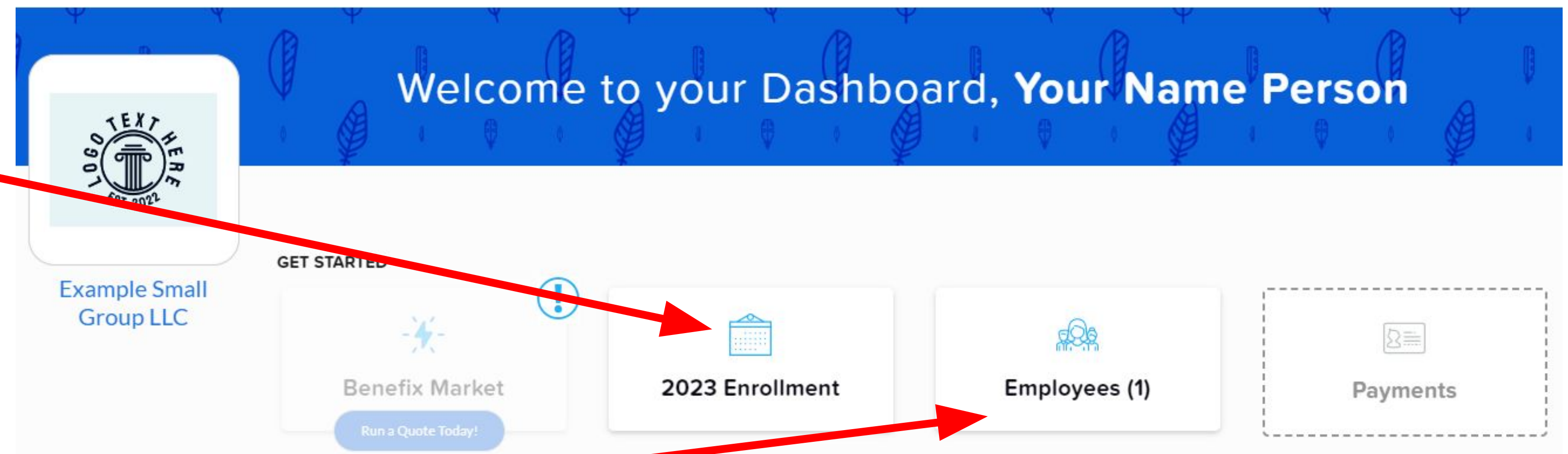
Enrollment Log in

[Forgot?](#) Remember me[Unlock your account](#)

How to Navigate the Dashboard

From your dashboard, you can access your *Enrollment Checklist* by clicking on the **“2023 Enrollment”** button

You can also view and edit your employees via the **“Employees”** button







Enrollment Checklist

benefix

Tracking Your Enrollment Progress

The 'Enrollment Checklist' is your to-do list, but it also doubles as your Progress Tracker:

- Each required step is listed, allowing you and your broker to know which items are outstanding vs. complete
- Every time an employee works on their application, the checklist updates in real time.

ENROLLMENT CHECKLIST		
	Group Application	20/20 Completed <input checked="" type="checkbox"/>
	Invite Employees	5 of 6 Employees Invited <input type="checkbox"/> 2 of 6 Employee Applications Completed <input type="checkbox"/>
	Additional Documents	1/1 Completed <input checked="" type="checkbox"/>
	Collect E-Signatures <small>*Not ready to sign. Please return to this step after all information has been collected.</small>	No Broker Signatures Required <input checked="" type="checkbox"/> 2 of 3 Group Admin Signatures Completed <input type="checkbox"/> 2 of 2 Policymaker Signatures Completed <input checked="" type="checkbox"/>

Completing the Group Application

benefix

Filling Out the Group Application

The group application can either be completely filled out by the broker or together through a collaborative effort.

- At the top of the Group Application, you can click on **'Highlight Incomplete Fields'** to see which required information still needs to be filled out.
- Be sure to click **'Save'** at the bottom of the application each time you've entered new information.

17 of 64 fields complete [\(Highlight incomplete fields\)](#)

Group Information

Group name

Sample Group LLC

Legal name

Sample Group LLC

SIC code

2021 - Creamery Butter

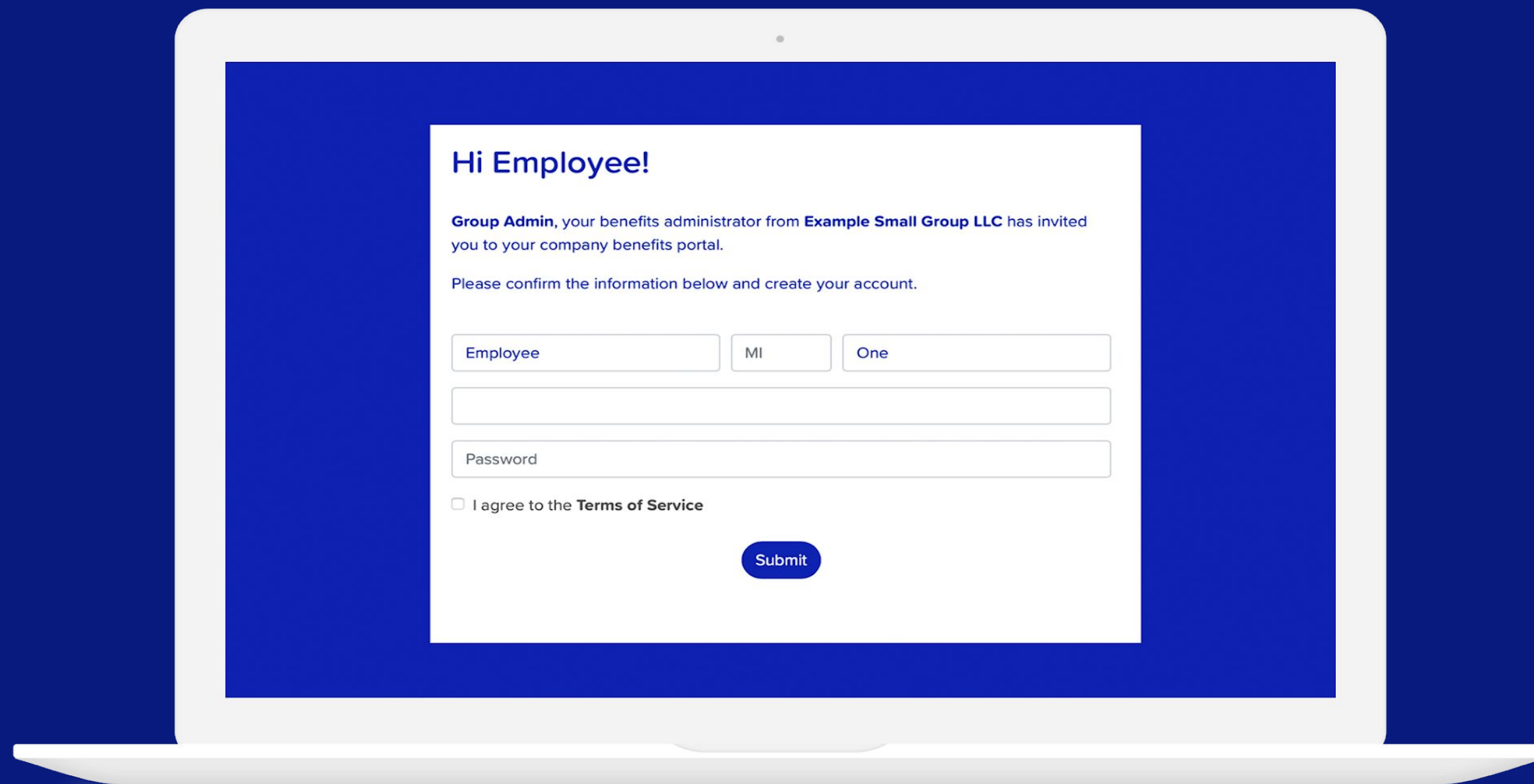
Physical Address

*

Street (line 1)

Inviting Employees to the Benefix System

Benefix has created a template to help
navigate communications with your
group regarding this new process 😊



Email Script:

Dear _____,

I wanted to share with you that we are using a new platform, **Benefix**, for our Open Enrollment this year. Benefix is an entirely digital platform, so no need to worry about any paperwork!

On _____, you will receive an email invitation from Benefix to finalize your account. Once you do, Benefix will walk you through a few simple steps that can be completed from a computer, tablet or smartphone! You will be able to easily confirm your personal information, view the plan(s) offered, as well as, payroll contributions.

Employee Applications

benefix

Send invitation(s) by:
Email Text Send invitation(s)

(Highlight incomplete fields)

NAME	EMAIL	DATE OF HIRE	HOURS WORKED PER WEEK	JOB TITLE	OWNER, PARTNER OR OFFICER OF THE COMPANY	EMPLOYMENT STATUS	EMPLOYEE CLASS	WORK LOCATION
Subscriber - 42 yo	Email	Date of hire	Hours wor...	Job title	Owner, partner or o...	Employment st... Full time	Employee...	Work Lo...
Subscriber - 42 yo	Email	Date of hire	Hours wor...	Job title	Owner, partner or o...	Employment st... Full time	Employee...	Work Lo...
Subscriber - 44 yo	Email	Date of hire	Hours wor...	Job title	Owner, partner or o...	Employment st... Full time	Employee...	Work Lo...
Subscriber - 25 yo	Email	Date of hire	Hours wor...	Job title	Owner, partner or o...	Employment st... Full time	Employee...	Work Lo...
Subscriber - 35 yo	Email	Date of hire	Hours wor...	Job title	Owner, partner or o...	Employment st... Full time	Employee...	Work Lo...

Sending Employee Applications

To invite employees to their applications, click **'Invite Employees'** in the Employee Application section.

- You have the option to send Invitations via email or text message
- Enter the required, carrier-specific information then click **'Send Invitations'**

+ Employee Invite Employees Download Census CSV Generate Employee Worksheets

Eligible Employees				Ineligible Employees	
Name	Enrolled Benefits	Waived Benefits	Coverage	Employment Status	Status
Employee One	Medical			Full Time	● In Progress (Last Login: 11/28/2022) Manage
Employee Two				Full Time	● Invitation Sent (Invited: 11/29/2022) Manage
Employee Three	Medical			Full Time	● Complete (Confirmed: 11/28/2022) Manage
Employee Four				Full Time	○ Awaiting Invitation Manage

Keeping Track of Employee Applications

Our colored system helps you stay on top of digitally collecting paperwork:

- : Invite not sent
- : Invite sent but not opened
- : Invite opened but not complete
- : Application complete (may be awaiting a group admin signature)

Employee Applications (contd.)

benefix

Name	Benefits	Coverage	Status
Employee One	Medical		● Complete (Confirmed: 7/10/2020) Manage
Employee Two	Medical		● Complete (Confirmed: 7/10/2020) Manage
Employee Three	Medical		● Complete (Confirmed: 7/13/2020) Manage
Employee Four	Medical	Dependents: 1	● Complete (Confirmed: 7/10/2020) Manage
Employee Five	Medical	Spouse: 1	● Complete (Confirmed: 7/10/2020) Manage

Completed Employee Applications

All progress trackers will reflect as green once all employees have completed their questionnaires.

NOTE: Once an employee completes their application, your signature as the group admin may be required before it is marked as complete.

Employee Application Tracker

- Easily track the number of sent invitations and the number of completed applications for employees from the 'Enrollment Checklist'
- Once all employee applications are complete, you'll see both progress trackers reflect green



Employee Applications

8 of 8 Employees Invited ✓

8 of 8 Employee Applications Completed ✓

Additional Documents

You can easily track the progress of any additional documents required by the carrier from the **'Enrollment Checklist'**

- Examples include: tax documents, EFT form, group size certification, etc.
- Once all required additional documents are completed, the progress tracker will reflect green



Additional Documents

1/1 Completed

Capital BlueCross

CBC eCHECK & Group/Corporate Check it Out Form required

Additional information is required for this form.
[Autofilled, No action needed.](#)

Tax Documentation: Proof of Ownership Document(s)

Required for groups where all owners do not show on the UC-2. Provide whichever best applies to the group: SS-4 (if haven't filled ownership tax docs yet), Schedule C (sole proprietors), Form 1065 and all accompanying K-1's for partners, Form 1120 (corporation), Form 1120S and all accompanying K-1's for partners, or Form 990 (non-profit) and UC-2 or payroll.

Capital Blue Cross Checklist

New Fully-Insured Mid-Market or Small Sales Paperwork Checklist

Capital BlueCross Additional Documents

Additional Documents can easily be downloaded and/or uploaded. Any document that says **'required'** is required by the carrier.

Collect E-Signatures

benefix



Collect E-Signatures

*All your currently required signatures have been collected.

No Broker Signatures Required

No Group Admin Signatures Required

0 of 1 Policymaker Signatures Completed

Benefix makes e-signing documents simple by allowing you to sign all required documents at one time.

Simply click **'Collect E-Signatures,'** review any terms and conditions, then sign. Once all signatures are captured, your broker can finalize and submit your group's enrollment!

Please add your signature

Additional Document Signature

Broker of Record Letter Signature

Group Application Signature

Company Policy Maker Signature

Employee Application Signatures

Employee One: Employee Applicati...

Employee Three: Employee Applica...

Employee Two: Employee Applicati...

SIGN HERE

CLEAR

SUBMIT

benefix

**Thank you for Enrolling
through Benefix!**

For more resources, visit our
Help Center:
<https://help.benefix.us/en/>

