



KANSAS CITY LIFE GROUP BENEFITS

DASHBOARD MANUAL



KANSAS CITY LIFE

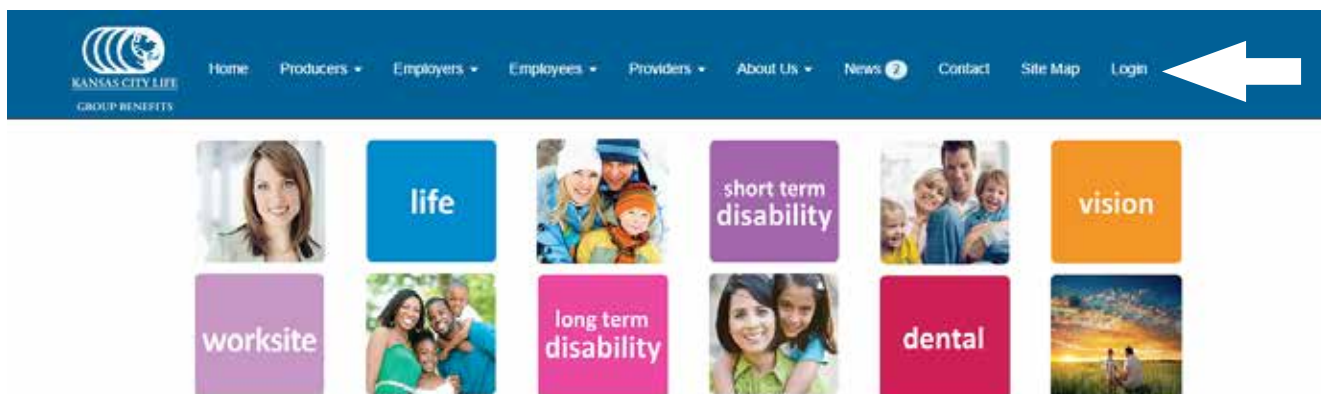
GROUP BENEFITS

What can you do with dashboards?

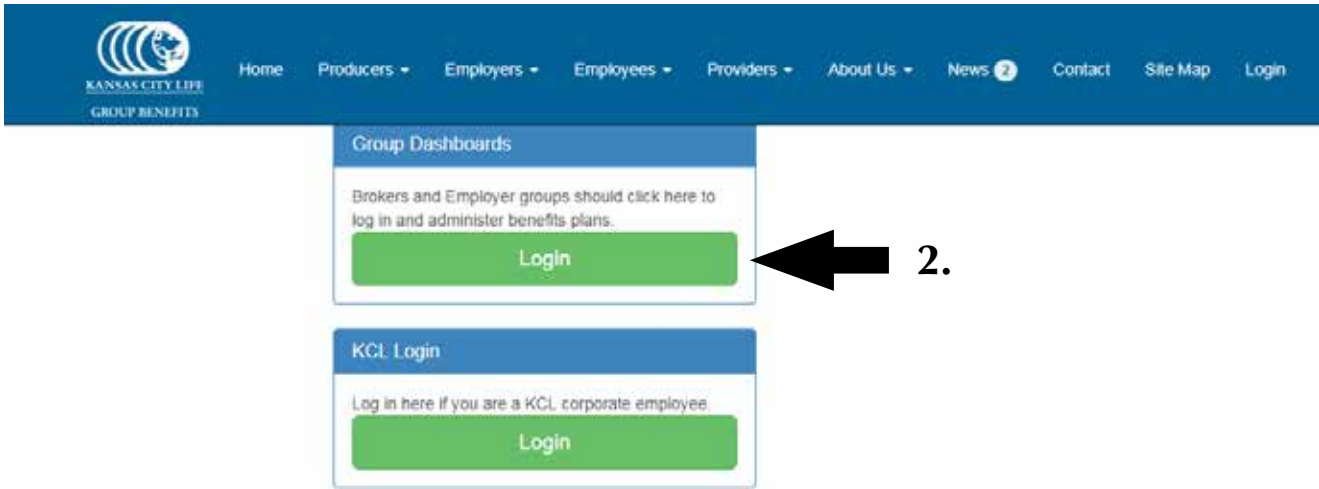
- Locate Value Added Services information
- Find a form
- View and pay bill
- View bill data
- View payment history
- Terminate members
- View and export the census
- Change employee salary information
- Update member information
- View uploaded files
- Add members (Dental/Vision/LTD/STD/Accident)
- Add members (Life)
- Add member for Open Enrollment (Dental/Vision)
- Add rehired employee
- Select paperless billing
- Print Dental/Vision ID cards
- View EAP presentation (if applicable)
- Download Dental Provider Directory

How to use:

- 1.) In your web browser go to www.kclgroupbenefits.com and click **Login** in the top right corner.



2.) Login to Group Dashboards.



3.) Login with your username and password. If you have forgotten your password, click ***Forgot Password*** and a new password will be emailed to you. If you don't receive an email, contact the Client Services Representative (CSR) listed on your monthly bill for assistance.

Group Dashboard

User Name (Group #)

Password [Forgot Password](#) **3.**

If you are a broker new to the KCL Group Dashboard, [click here](#) to register.

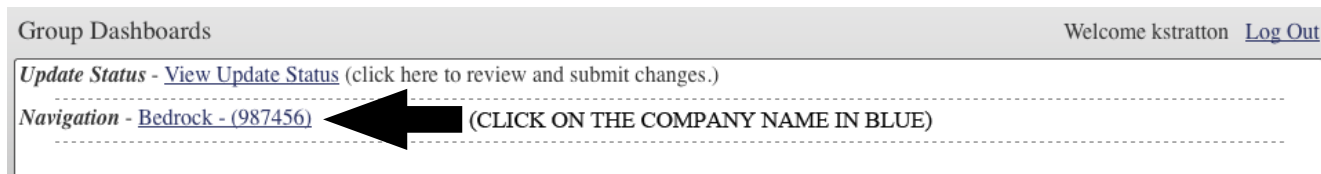
If you are already registered, log in with your user name and password above.

- 4.) To see if your group is available for access, look in the upper right corner: If a **green ✓** is shown, you have access to make changes. If a **red ✗** is shown, changes are being processed and you will be unable to make changes at that time and should check back later.
If a **blue eye** is shown, please contact your CSR.
- 5.) To log out at any time, click the words **Log Out** in the top-right corner of the screen.
- 6.) The bottom half of the home page contains links to all options on the website. Simply click the link for the one you want to use.



Group Dashboard	Welcome	Log Out
<u>Group Identification Code:</u>	(Group is available for changes)	
<u>Address</u>		
<u>Routine Contact Information</u>		
<ul style="list-style-type: none"> • Name: • Phone Number: • E-mail Address: 		
<u>KCL Administrator Information</u>		
<ul style="list-style-type: none"> • Name: • E-mail: • Phone: • Fax: 		
<u>Options</u>		
<ul style="list-style-type: none"> • Group Search • Value Added Services • Find A Form • View Bills • View Bill Data • Pay Bill • Payment History • Terminate Members • View Census • Change Employee Salary • Update Member Information • File Database • Add Member (Dental/Vision/LTD/STD/Accident Only) • Add Member Life • Add Member for Open Enrollment (Dental/Vision) • Add Rehired Employee • View Update Status • Admin Options • Download Dental Provider Directory • Request Dental/Vision ID Cards • EAP Presentation • EAP Member Card 	<p>NOTE: Prior to logging out please submit all changes by going through Update Status in the menu options. All changes will be lost if not submitted.</p> <p>NOTE 2: <i>Member</i> refers to Employee/Spouse/Child(ren).</p>	

7.) Any time you wish to return to the home page, click on the **back** button.



Please Note:

- You **must** submit all changes other than *Add Member Life, Add Member for Open Enrollment (Dental/Vision) and Add Rehired Employee* by clicking on *View Update Status*. This will be found on the home page or along the top of the page while processing changes. New members for life insurance must be processed by your CSR and you will not see these life add changes on your census until it has been processed. Your “add” will be processed within five business days and then will be viewable on *Dashboards*.

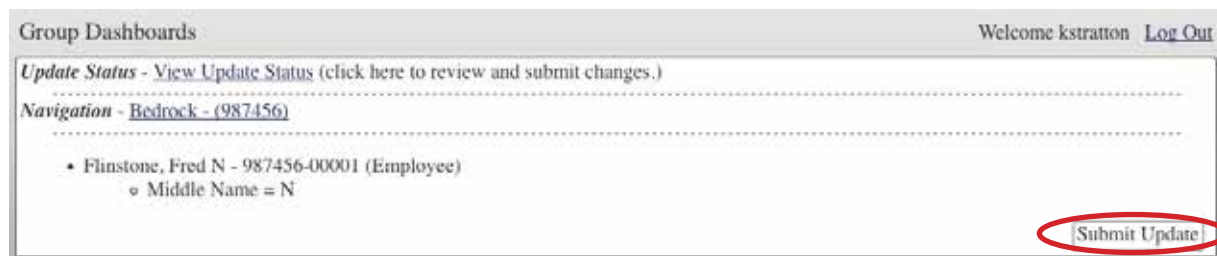
Options:

- Group Search
- Value Added Services
- Find a Form
- View Bills
- View Bill Data
- Pay Bill
- Payment History
- Terminate Members
- View Census
- Change Employee Salary
- Update Member Information
- File Database
- Add Member (Dental/Vision/LTD/STD/Accident Only)
- Add Member Life
- Add Member for Open Enrollment (Dental/Vision)
- Add Rehired Employee
- **View Update Status**
- Admin Options
- Request Dental/Vision ID Cards
- Download Dental Provider Directory
- EAP Presentation
- EAP Member Card

NOTE: Prior to logging out, please submit all changes by going through Update Status in the menu options. All changes will be lost if not submitted.

NOTE 2: *Member* refers to Employee/Spouse/Child(ren).

- Once all changes have been completed and reviewed, click on *Submit Update*.



- **Value Added Services**

You will find information regarding available Value Added Services for life and disability clients. You may also print wallet cards for eligible employees.

- **Find a Form**

By clicking *Find a Form*, you will be routed to the website. Once there, choose the product in the drop down box. Click on your state. The screen will refresh and links to the appropriate forms will be shown.



How to view, pay bills and view payment history:

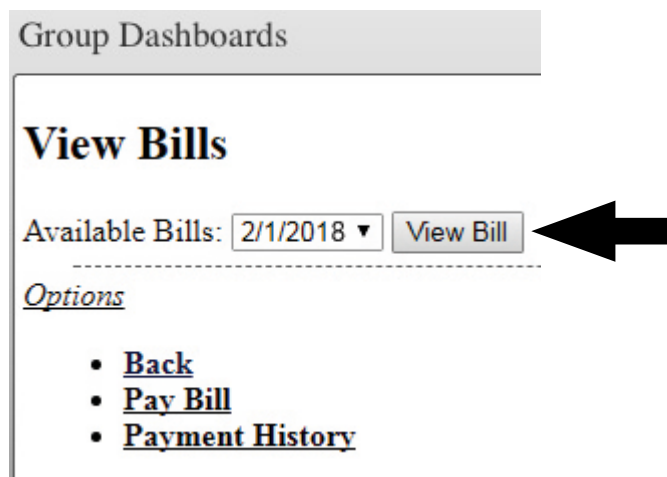
To view the bill, click the **View Bills** link on the home page. This will display the **View Bills** Page.

Options:

- Group Search
- Value Added Services
- Find a Form
- **View Bills**
- View Bill Data
- Pay Bill
- Payment History
- Terminate Members
- View Census
- Change Employee Salary
- Update Member Information
- File Database
- Add Member (Dental/Vision/LTD/STD/Accident Only)
- Add Member Life
- Add Member for Open Enrollment (Dental/Vision)
- Add Rehired Employee
- View Update Status
- Admin Options
- Request Dental/Vision ID Cards
- Download Dental Provider Directory
- EAP Presentation
- EAP Member Card

NOTE: Prior to logging out, please submit all changes by going through Update Status in the menu options. All changes will be lost if not submitted.
NOTE 2: *Member* refers to Employee/Spouse/Child(ren).

To see a particular bill, select the date of the bill you want to view from the drop-down menu and click the **View Bills** button.



Group Dashboards

View Bills

Available Bills: 2/1/2018 ▾ View Bill

Options

- [Back](#)
- [Pay Bill](#)
- [Payment History](#)

The PDF for that bill will appear in a pop-up box with the option to **Open**, or **Save**.

While on the **View Bills** page you have the option to **Pay Bill** or view **Payment History**.

To go back to the home page, click the **Back** link.

To pay a bill, click **Pay Bill**. This will take you to the Kansas City Life Online Payment website. **Note:** This will navigate you out of Dashboards. Follow instructions to make an online payment.



Online Web Pay

Group Number: <input type="text"/>
Group Zip Code: <input type="text"/>
<input type="button" value="Submit"/>

Kansas City Life Insurance Company

To view the payment history, click the **Payment History** link. This page shows the date payment was received, check amount and the date of the bill on which the payment appears.

Group Dashboards		
* Payments may take from 5 to 7 business days to appear in history Group is currently paid through: 6/30/2011		
Date Received	Check Amount	Bill Payment Appears On
7/26/2011	\$894.46	6/1/2011
3/24/2011	\$894.46	5/1/2011
2/23/2011	\$894.46	4/1/2011
1/27/2011	\$894.46	3/1/2011
1/26/2011	\$894.46	2/1/2011
12/28/2010	\$894.46	7/1/2011
11/23/2010	\$894.46	1/1/2011
10/28/2010	\$894.46	12/1/2010
9/22/2010	\$894.46	11/1/2010
8/18/2010	\$894.46	10/1/2010
7/27/2010	\$894.46	9/1/2010
6/25/2010	\$894.46	8/1/2010
5/21/2010	\$894.46	7/1/2010
4/21/2010	\$895.87	6/1/2010

If you are on this page and you would like to **Pay Bill** or **View Bills**, click the corresponding link. To go back to the home page, click the group name or the **Back** link.

Options

- [**Back**](#)
- [**Pay Bill**](#)
- [**View Bills**](#)

How to view bill data:

This function will display the actual bill data and can be used to help reconcile a bill by product, division, members, etc.

To view the bill data, click the ***View Bill Data*** link on the home page.

Options:

- Group Search
- Value Added Services
- Find a Form
- View Bills
- **View Bill Data**
- Pay Bill
- Payment History
- Terminate Members
- View Census
- Change Employee Salary
- Update Member Information
- File Database
- Add Member (Dental/Vision/LTD/STD/Accident Only)
- Add Member Life
- Add Member for Open Enrollment (Dental/Vision)
- Add Rehired Employee
- View Update Status
- Admin Options
- Request Dental/Vision ID Cards
- Download Dental Provider Directory
- EAP Presentation
- EAP Member Card

To see the detail data for a bill, select the available bill you want and click on ***View Bill Data***.



The data will then display each of the employee's charges by product for that bill period at the top of the excel spreadsheet and for adjustments below that. The total of the bill period charges and the adjustments will equal the total bill. Please note that if the group has an outstanding amount not paid or a credit from a previous bill, this will not be included on the spreadsheet.

How to terminate a member:

To terminate a member, click the **Terminate Members** link on the home page. A list of all the members of the group will be displayed. Find and click on the member you want to terminate or utilize the search options. After clicking on the member you want to terminate, the termination page will be displayed. On this page, simply click your cursor in the **Termination Date** text box, and a calendar will pop up, on which you select the member's last day of work, and the system will calculate the termination date. Check all the products you want to terminate for that member and click the **Submit** button. The next screen confirms terminated coverages; from here you can go back to the home page (by clicking the group name), terminate another member, or go to **View Update Status** where you must submit your changes.

Group Dashboards Welcome [Log Out](#)

[Update Status](#) - [View Update Status](#) (click here to review and submit changes.)

[Navigation](#) - [Terminate Members](#) - [Bedrock - \(987456\)](#) - [Census List](#) - Flinstone, Fred N

Enter a date below to terminate this member from coverage.

Select All
 True Group Dental
 True Group Life
 Voluntary Dental

How to change an employee's salary:

To change an employee's salary, click the **Change Employee Salary** link on the home page. A list of all members of the group will be displayed. Find and click on the member whose salary information you want to change, or utilize the search options. After clicking on the member, the salary change page will be displayed. On this page, select the correct **Salary Type** from the drop down menu and indicate the member's salary.

Group Dashboards Welcome [Log Out](#)

Update Status - [View Update Status](#) (click here to review and submit changes.)

Navigation - Change Employee Salary - [Bedrock - \(987456\)](#)

Help - If a member's name is grayed out, they are considered inactive.
To reactivate an inactive member, please contact your KCL Group Client Services Representative

= EE = Spouse = Child = Changes have been made to this member

Search - First Name: Last Name:

Flinstone, Fred

Rubble, Barney

Total: 2

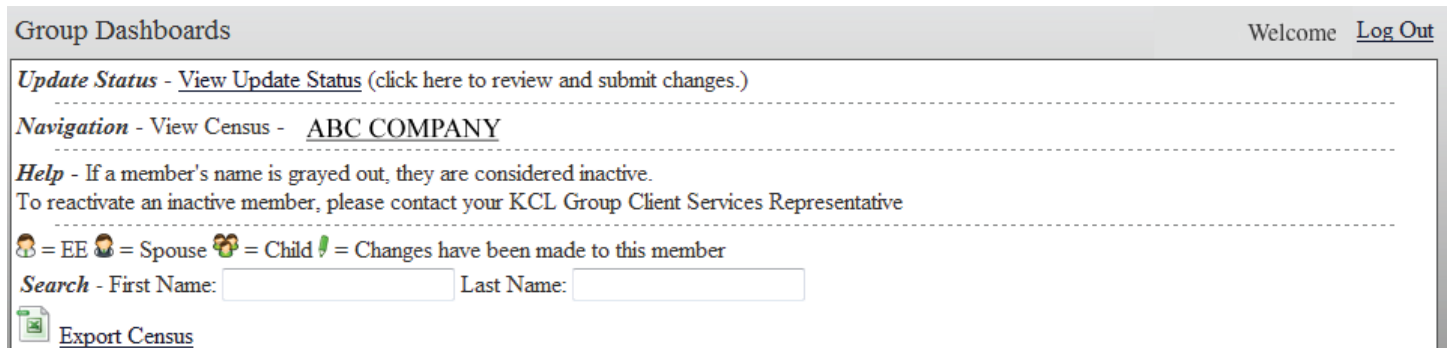
Please be aware: The salary amount and salary type must match. Example: If the employee makes \$41,288 a year (based on a 30-hour work week), then the Salary Type should be Annual, the Salary should read 41288.00 and weekly hours worked should be 30 hours.

Note: Do not include any characters, such as “\$,” within the Salary box.

When you have all the salary information entered, click the **Submit Change** button, and you will be taken back to the census list, where you can make salary changes to another member, or you can go back to the home page (by clicking the group name) or go to **View Update Status** where you must submit your changes.

How to view or export the census:

To view the census, click the **View Census** link on the home page. A list of all the members of the group will be displayed. Find and click on the member you want to view, or search utilizing the available options.



Group Dashboards Welcome [Log Out](#)

[Update Status](#) - [View Update Status](#) (click here to review and submit changes.)

[Navigation](#) - [View Census](#) - [ABC COMPANY](#)

Help - If a member's name is grayed out, they are considered inactive.
To reactivate an inactive member, please contact your KCL Group Client Services Representative

= EE = Spouse = Child = Changes have been made to this member

Search - First Name: Last Name:

[Export Census](#)

Take note of the legend above the search boxes, which explains the icons. Also note that grayed out members are considered “inactive,” but may still be viewed.

Click on a member to bring up the information. If the member has active coverages, there will be a link for each one in which he or she is enrolled toward the bottom of the page. If you click on a link for coverage, some information about that particular coverage will be displayed.

To export a census of active enrollees, click **Export Census**. You will be asked, ‘Do you want to open or save this file?’ Choose the option that best fits your needs. The census includes first and last name, birth date, Social Security number, address, COBRA (yes or no), earnings and the enrollee’s active coverages. If multiple products, an “A” will be listed for Active and a “T” will be listed for Terminated.

To navigate back to the home page, click on the group name.

How to update member information:

To update a member's information, begin by clicking the **Update Member Information** link on the home page. A list of all the members of the group will be displayed. Find and click on the member whose information you want to change or utilize the search options. After clicking on the member, a page will be displayed that has editable text boxes in which you can type information. When you are finished, click the **Submit Change** button. This will take you back to the census list, where you can change another member's information. Go back to the home page (by clicking on the group name) or go to **View Update Status** where you must submit your changes.

Group Dashboards Welcome [Log Out](#)

Update Status - [View Update Status](#) (click here to review and submit changes.)

Navigation - [Update Member Information](#) - [Bedrock - \(987456\)](#) - [Census List](#) - Flinstone, Fred N

Populate or edit the fields below to edit this member's information.

Member Personal Information

First Name	<input type="text" value="Fred"/>
Middle Name	<input type="text" value="N"/>
Last Name	<input type="text" value="Flinstone"/>
Suffix	<input type="text"/>
Social Security Number	<input type="text" value="000-00-0000"/>
Birth Date (mm/dd/yyyy)	<input type="text" value="1/31/1970"/>

Member Address

Address Line 1	<input type="text" value="301 Cobblestone Way"/>
Address Line 2	<input type="text"/>
City	<input type="text" value="Bedrock"/>
State	<input type="text" value="MO"/>
Zip Code	<input type="text" value="64105"/>

Please choose which dependent(s) to apply the updated address information too.

Flinstone, Wilma
 Flintone, Pebbles

How to view files:

To view files, such as certificates, policies or renewal letters, that have been uploaded, click the **File Database** link on the home page and uploaded files will be displayed. To view a file, click on it. You will have the option to save or open the file. To get back to the home page, click the group name at the top of the page.

Group Dashboards

Navigation - [Bedrock - \(987456\)](#)

Below are all the files associated with this group. Simply click on the box to download the file.



4-4173.doc
2010 Renewal Letter



4-4173.pdf
2011 Renewal Letter

How to add a member to Dental/Vision/LTD/STD/Accident:

To add a member, you will click the *Add Member (Dental/Vision/LTD/STD/Accident Only)* link on the home page to get started.

Note: Salary and occupation are required to add members to disability products.

Select if you want to add an employee, spouse or child, and click *Next*. Continue to answer all of the questions until you get to the page that tells you that you have added the member. Once you have added a new member, there are links that will allow you to add a spouse or child.* You may also choose to add additional employees, go back to the home page (by clicking the group name) or *View Update Status* where you must submit your changes.

**There is also an option to add life coverage for the member.*

How to add a member to Life:

To add a member to Life, click on the *Add Member Life* link on the home page.

This allows you to add life coverage to an existing member or a new member.

Input all of the required fields on the Life Add Form and click submit. You will then receive a message stating “Your Life Add has been submitted to your administrator for processing. You will not see these changes on your census until it has been processed by your administrator. Your add should be processed within the next five days and will be viewable on Dashboards.”

Life/Rehires/Open Enrollment are the three items that are not real time in the system and have to be processed by the Home Office.

How to add a rehired employee:

To add a rehired employee, click ***Add Rehired Employee*** link on the home page.

This allows you to choose a terminated employee to be reactivated for coverage or enter the employee's information if not found within the terminated employee listing.

To choose a terminated employee, click on the employee's grayed out name and complete the required fields to Add a Rehired Employee and click *Submit*. If adding Dependents, click *Add Dependent* at the bottom of the form, once all Dependents have been added, click *Submit*. You will then receive a message stating "Your Add Rehired Employee" request has been submitted to your administrator for processing. You will not see these changes on your census until it has been processed by the Kansas City Life administrator. Your add should be processed within the next five business days and be viewable on Dashboards."

How to Add Member for Open Enrollment (Dental/Vision):

To add a Member for Open Enrollment, click ***Add Member for Open Enrollment (Dental/Vision)*** link on the home page.

This allows you to add Dental/Vision coverage to an existing or new member and/or add Dependent coverage to the employee.

To choose an active member, click employee's name and complete the required fields to Add open enrollment and click *Submit*. If adding dependents, click *Add Dependent* at the bottom of the form. Once all dependents have been added, click *Submit*. You will then receive a message stating "Your Open Enrollment has been submitted to your administrator for processing. You will not see these changes on your census until it has been processed by the Kansas City Life administrator. Your add should be processed within the next five business days and be viewable on Dashboards."

How to finalize changes:

To submit changes, click the *View Update Status* link found on the home page or at the top of other pages on the website. Review all the changes listed to ensure they are accurate. If so, click the *Submit Update* button.

Please be aware:

- You may undo salary or member information changes before clicking the *Submit Update* button. To do so, go back and change the values to what they should be and then click *Submit Update*.
- There is no way to undo a termination or addition of a member, so be careful when making these types of changes (you can change information for a newly added member, but you cannot delete the member). If you have made a mistake, please contact your CSR.
- Logging out without clicking the *Submit Update* from *View Update Status* will delete all changes made and will not submit them. These changes would have to be re-entered and submitted.

Admin Options:

Options:

- Group Search
- Value Added Services
- Find a Form
- View Bills
- View Bill Data
- Pay Bill
- Payment History
- Terminate Members
- View Census
- Change Employee Salary
- Update Member Information
- File Database
- Add Member (Dental/Vision/LTD/STD/Accident Only)
- Add Member Life
- Add Member for Open Enrollment (Dental/Vision)
- Add Rehired Employee
- View Update Status
- **Admin Options**
- Request Dental/Vision ID Cards
- Download Dental Provider Directory
- EAP Presentation
- EAP Member Card

NOTE: Prior to logging out, please submit all changes by going through Update Status in the menu options. All changes will be lost if not submitted.

NOTE 2: *Member* refers to Employee/Spouse/Child(ren).

This is where you may modify/elect the following:

- Paperless Billing – elect to receive email notifications of monthly invoices
- Change Password – update your current password
- Update Email Address – choose an email address to receive password resets to online access
- Update Broker Access – check yes or no to grant your broker online access to view/process changes for your group policy.

All of the changes above do not have to be processed through View Update Status.

For Paperless Billing you will receive an email (see example below) when your bill is ready.

Email example:

We are pleased to inform you that your current Kansas City Life Group Billing Statement is now available. To view your online billing statement go to *www.kclgroupbenefits.com*, click *Login* (top right corner of the screen) and enter your username and password. Click on *Proceed to Dashboards*. After it loads (under Options), click on *View Bills*. Select the bill you want to view from the drop down box and click on *View Bill*.

Request Dental/Vision ID Cards

This is where you may order a supply of generic Dental or Vision ID cards.
Click on *Request Dental/Vision ID Cards*.

Options:

- Group Search
- Value Added Services
- Find a Form
- View Bills
- View Bill Data
- Pay Bill
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- View Census
- Change Employee Salary
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- Admin Options
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NOTE: Prior to logging out, please submit all changes by going through Update Status in the menu options. All changes will be lost if not submitted.
NOTE 2: *Member* refers to Employee/Spouse/Child(ren).

This will display the Dental ID Card to either print or download a PDF file. If your group has Vision insurance, it will provide information on how to obtain a vision card.

Download Dental Provider Directory:

Groups enrolled with Dental coverage may click on this link for a Dental Provider Directory either by zip code or state. You have the ability to either print the directory in PDF format or export the directory information into an Excel document.

When you click on *Download Dental Provider Directory* option, it will take you to the following screen:

Navigation - Download Dental Directories - Download Dental Provider Directory

Search Type:



You can change this dropdown from either zip code search or to state search

Zip Code:

Select Distance:

Select Speciality:

First Name:

Last Name:

Directory Format:



You can change this dropdown from either a PDF directory or an Excel document

[Download Dental Provider Directory](#)

After entering your criteria, click on *Download Dental Provider Directory* to receive your search results in the format requested.

EAP Presentation:

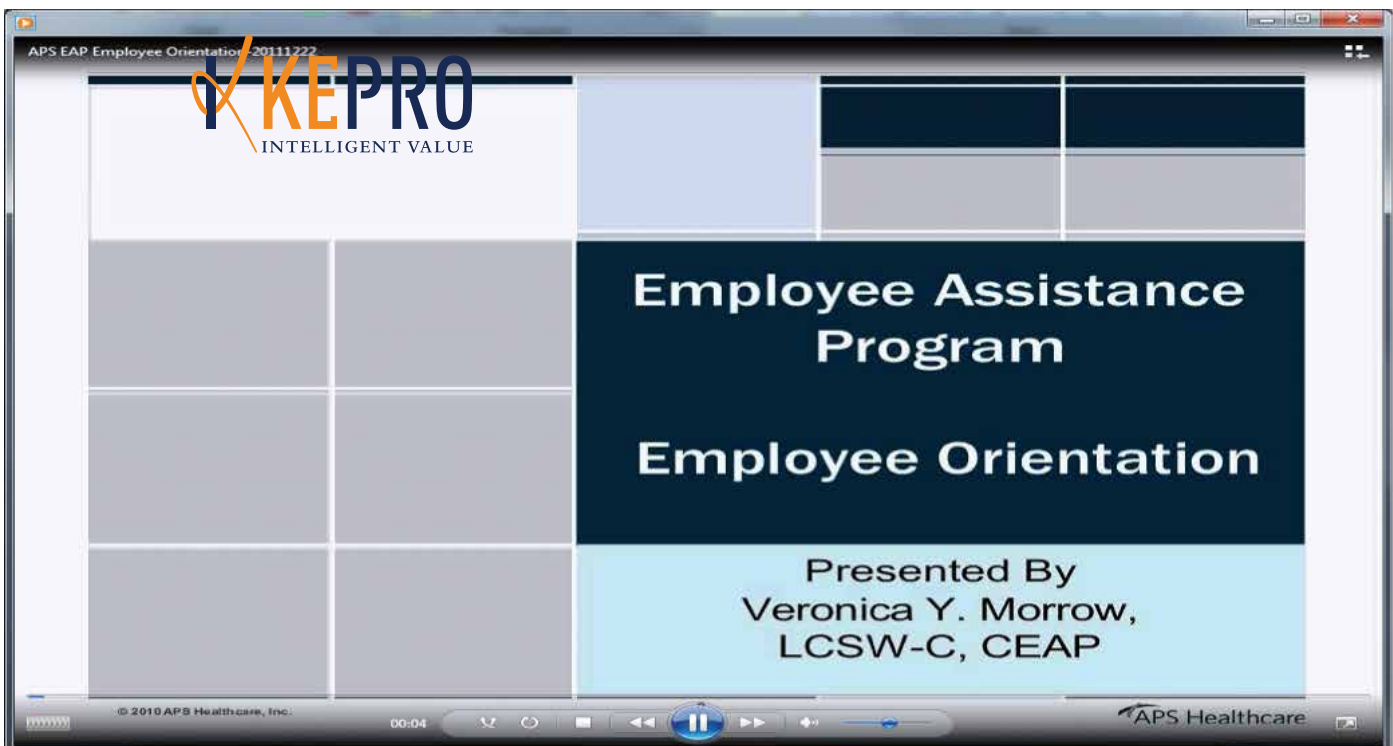
Groups enrolled with access to the employee assistance program may click on this link for an overview of the EAP Program Services offered through KEPRO.

Options:

- Group Search
- Value Added Services
- Find a Form
- View Bills
- View Bill Data
- Pay Bill
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- Add Member (Dental/Vision/LTD/STD/Accident Only)
- Add Member Life
- Add Member for Open Enrollment (Dental/Vision)
- Add Rehired Employee
- View Update Status
- Admin Options
- Request Dental/Vision ID Cards
- Download Dental Provider Directory
- **EAP Presentation**
- EAP Member Card

NOTE: Prior to logging out, please submit all changes by going through Update Status in the menu options. All changes will be lost if not submitted.

NOTE 2: *Member* refers to Employee/Spouse/Child(ren).



*Dedicated to excellence.
Your partner in employee benefits.*



KANSAS CITY LIFE

GROUP BENEFITS

Underwritten by: Kansas City Life Insurance Company
3520 Broadway • Kansas City, MO 64111-2565
P.O. Box 219425 • Kansas City, MO 64121-9425
Toll-free: 877-266-6767, ext. 8200 • Fax: 816-531-4648
groupbenefits@kclife.com • www.kclgroupbenefits.com

