Group Dashboard Manual

KANSAS CITY LIFE
GROUP BENEFITS

life | long term disability | short term disability | dental | vision | worksite

What can you do with dashboards?
- View and pay a bill
- View and export bill data into Excel
- View payment history
- View and export the census
- Add, terminate and update member information
- Find a form
- Retrieve information on included Value Added Services
- Access policy documents, certificates and renewal letters
- Enroll in paperless billing
- Download a dental provider directory
- Print dental and vision ID cards

Please note: All changes submitted through the dashboards go to *Pending Changes* first. This gives you the option to view, edit or delete your change. You also have the ability to print a copy of changes prior to submitting. Once you have reviewed all changes, you must *Submit the Changes* from *Pending Changes* to actually hit our billing system. Make sure you submit all changes from *Pending Changes* or they will not go through to our system.

1. In your web browser, go to *www.kclgroupbenefits.com* and under *Employers,* click on *Log into Group Dashboard.*
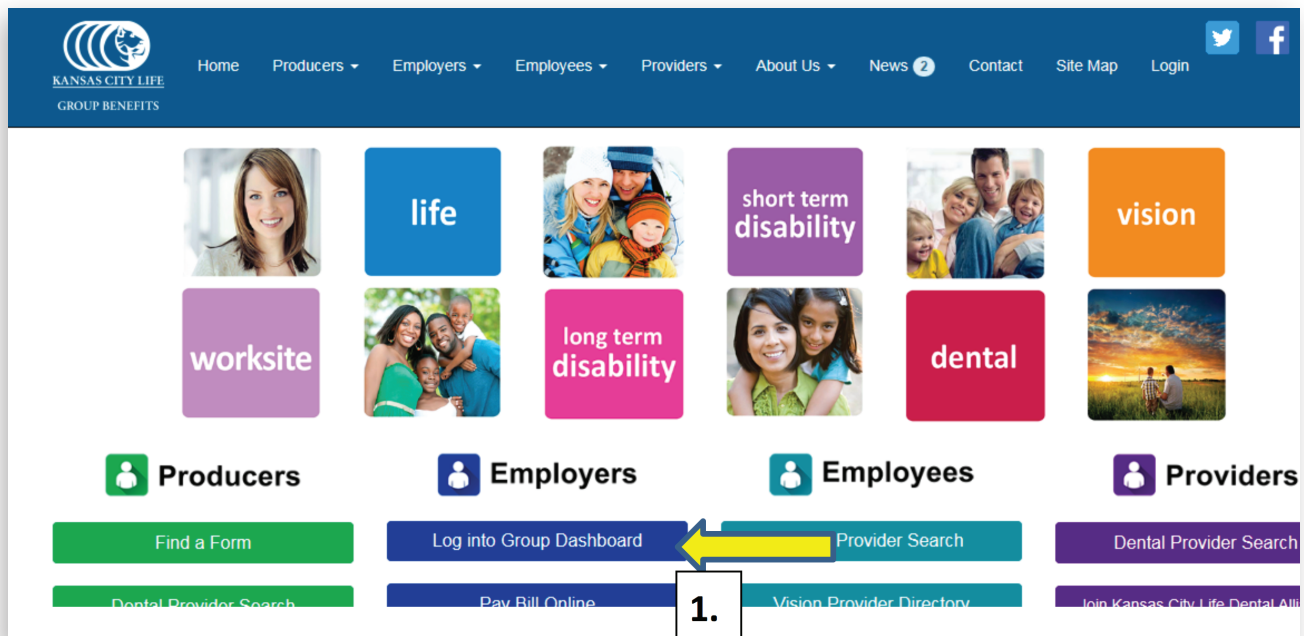
2. Log in with your username and password. Your password is included with the new policy documents you received when your policy was first issued. If you have forgotten your password, click *Forgot Password* and a new password will be emailed to you. If you do not receive an email, contact your Client Services Representative (CSR) listed on your monthly bill for assistance.

3. You may access the Group Dashboard to submit changes at all times. Keep in mind, if your CSR is making changes on the group at the same time, your changes will be held and processed as soon as the Home Office changes have completed. If your changes are not completed within 15 minutes after submission, please contact your CSR to verify your changes are in the queue.

4. You may log out at any time, finding the option in the top right corner of the screen.

5. The bottom half of the home page contains links to all administrative options available on your dashboard.

<u>Pay Bill</u> – Clicking *Pay Bill* will route you to the Kansas City Life Online Payment website.

Please note: This will navigate you out of the Group Dashboard.

Follow instructions to make an online payment.

<u>View Bills</u> – To see a particular bill, select the date of the bill from the dropdown menu and then click on *View Bill*.

<u>View Bill Data</u> – This function will display and export the actual bill detail into an Excel spreadsheet which can be used to help reconcile a bill by product, division, members, etc.

Select the available bill from the dropdown and then click *View Bill Data*.

The export will contain the billed charges as well as any adjustments. The total of the "bill period charges" and "adjustments" will equal the TOTAL BILL.

Please note: If there is an outstanding balance or credit from a prior bill, it will not appear on this spreadsheet.

See sample report below:

GroupID - 00002			Coverage Code:											
Billing Period Start Date: 04-01-2020			EE = Employee Only											
Billing Period End Date: 04-30-2020			EF = Employee + Family											
			SP = Spouse											
			DE = Dependent(s)											
			EM = Employee + Member											
			ES = Employee + Spouse											
CHARGES														
Last Name	First Name		Division	Code	Dental	TG Life	TG Life Vo	TG Life AD	TG Life AD	Vol. Life	vol. Life V	LTD	LTD Volume	Total
XX	XX		XX	EE	0	5.2	32500	0.98	32500	120.32	65000	26.67	8333	153.17
				EE	0	3.2	20000	0.6	20000	0	0	12.48	3900	16.28
				EE	0	4	25000	0.75	25000	49.2	100000	26.67	8333	80.62
				SP	0	0	0	0	0	24.6	50000	0	0	24.6
				EE	0	3.2	20000	0.6	20000	105.1	100000	24.35	7610	133.25
				EE	0	4	25000	0.75	25000	75.4	100000	26.67	8333	106.82
				EE	0	3.2	20000	0.6	20000	37.7	50000	17.69	5528	59.19
				EE	0	4	25000	0.75	25000	105.1	100000	26.67	8333	136.52
				EE	0	3.2	20000	0.6	20000	37.7	50000	26.67	8333	68.17
				EE	0	3.2	20000	0.6	20000	0	0	24.81	7752	28.61
				EE	0	3.2	20000	0.6	20000	0	0	26.67	8333	30.47
				EE	0	3.2	20000	0.6	20000	30.4	100000	26.67	8333	60.87
				DE	0	0	0	0	0	2	10000	0	0	2

<u>Payment History</u> – This option indicates the date payment was received, check amount and the date of the bill on which the payment appears. You will also find the paid through date on this screen.

Payment History

Payments may take from 5 to 7 business days to appear in history.

Group is currently paid through: 7/31/2019

Date Received	Check Amount	Bill Payment Appears On
7/5/2019	$972.80	8/1/2019
6/7/2019	$1,240.04	7/1/2019
5/1/2019	$1,020.88	6/1/2019
4/3/2019	$1,020.88	5/1/2019
3/4/2019	$2,291.19	4/1/2019
2/25/2019	$77.00	4/1/2019

<u>View Census</u> – This selection displays a list of all the members of the group. You may scroll to find the member you wish to view or search utilizing the available search option. Notice the legend which identifies the icons. Also be aware that grayed out members are considered inactive but may still be viewed.

By clicking on a member you will be able to view some personal information as well as the active coverages. If you click on a coverage link, enrollment information about that particular line of coverage will be displayed.

From this page you are also able to export a census of active enrollees into Excel. The Census Export includes first and last name, date of birth, the last four digits of the Social Security number, address, COBRA (yes or no), earnings and the enrollee's active coverages. "A" represents active coverage. "T" indicates the coverage is terminated.

<u>Add Members</u> – You will utilize this selection to add a new employee or dependents to a group coverage.

Be aware that salary and occupation are required to add members to disability products.

Please note: New members due to COBRA benefits, court orders or moving from part-time to full-time need to be submitted to your CSR for processing. Please email your CSR with the necessary documentation or fax the information to 816-753-2964.

Select the type of member you are adding from the blue boxes.

The process for adding members is essentially the same for all of the available options, but we will step through the process for adding a *New Hire*.

First, enter the *Member Personal Information*. Required fields are noted with an asterisk (*).

Complete the *Member Employment Information* and *Select Division*, if applicable. Only groups with multiple divisions will display available options in the division drop down box.

Select applicable products for which the member is intending to enroll.

Select the *Class Enrollment*, if applicable. Groups with multiple classes will display available options in a dropdown box.

If applicable to the coverage selection, you will be able to add dependents by checking the box.

Check to enroll dependents for coverage ☑

Spouse ☐ Child(ren) ☐

Select to add coverage for spouse, children or both.

Check the products you want to add for the dependents.

Spouse Information

Select Products for Spouse Enrollment:

☐ Dental   ☐ Vision   ☐ Voluntary Life   ☐ Accident

Then complete the dependent information requested for each dependent.

Spouse Information

Select Products for Spouse Enrollment:

☑ Dental   ☑ Vision   ☐ Voluntary Life

First Name:	Last Name:	Date of Birth:	Gender:
Spouse First Name	Spouse Last Name	12/31/9999	-- Select --

Child(ren) Information

Select Products for Child(ren) Enrollment:

*For Accident, Dental, and Vision you will need to select to enroll the product per dependent.

Click 'Add Child' to enroll in additional products:

Add Child

Once all sections are completed click *Add to Pending Changes*.

Check to enroll dependents for coverage ☑

Spouse ☑ Child(ren) ☑

Spouse Information

Select Products for Spouse Enrollment:

☑ Dental

First Name:	Last Name:	Date of Birth:	Gender:
Spouse First Name	Spouse Last Name	12/31/9999	-- Select -- ▼

Remove Spouse

Child(ren) Information

Select Products for Child(ren) Enrollment:

*For Accident, Dental, and Vision you will need to select to enroll the product per dependent.

Click 'Add Child' to enroll in additional products:

Child 1

☐ Dental

First Name:	Last Name:	Date of Birth:	Gender:
Child First Name	Child Last Name	Child Date of Birth	-- Select -- ▼

Relationship to Employee:

-- Select -- ▼

Remove Child

*To add additional children click 'Add Child'

Add Child

Add to Pending Changes

Pending changes will appear for each function you perform and you can view, edit or delete any of the pending changes prior to submitting.

Once you have verified your changes are complete and accurate and you have printed a copy of the changes for your records (if you wish to do so), you will select *Submit Pending Changes* found below all of the change sections.

Alert: No changes are pushed through to the billing system until you click *Submit Pending Changes*. Scroll to the bottom of all of the pending changes to see the button.

The process for adding members due to rehire, loss of coverage, open enrollment, marriage and birth are essentially the same as for a new hire.

<u>Update Members</u> – If you need to make a change to an existing member for any reason, utilize the *Update Member Option*.

Select the member from the listing or utilize the search option. Make the appropriate change within the editable text box.

If applicable to your coverage, you may also choose to update a member's salary by clicking on *Employee Salary Information*. You will select the correct salary type from the dropdown box menu and indicate the member's salary.

Please be aware the salary information and salary type must match. For example, if the employee makes $41,288 a year (based on a 30-hour work week), the salary type should be annual, the salary should read 41288.00 and weekly hours should be 30 hours.

Please note: Do not include any characters, such as a "$" within the salary box.

When you are finished, click on *Add to Pending Changes*.

Once you have verified all of your changes are complete and accurate and you have printed a copy of the changes for your records (if you wish to do so), you will select *Submit Pending Changes* found below all of the change sections.

Alert: No changes are pushed through to the billing system until you click *Submit Pending Changes*. Scroll to the bottom of all of the pending changes to see the button.

<u>Terminate Members</u> – Select the member from the listing or utilize the search option. Enter the termination date and select the products you wish to terminate for the member or *Select All* to terminate all products.

When complete select *Add to Pending Changes*, which will take you to the Pending Changes screen to view, edit or delete the change. After reviewing your change select *Submit Pending Changes*.

Once you have verified all of your changes are complete and accurate and you have printed a copy of the changes for your records (if you wish to do so), you will select *Submit Pending Changes* found below all of the change sections.

Alert: No changes are pushed through to the billing system until you click *Submit Pending Changes*. Scroll to the bottom of all of the pending changes to see the button.

<u>Find a Form</u> – This option takes you to *www.kclgroupbenefits.com*. Once you select your state, the screen will refresh and available forms will display by product. Select the forms you wish to print and then click *Get Forms*.

<u>Value Added Services</u> – The options that appear here will vary based on the lines of coverage you have inforce with Kansas City Life. Applicable brochures and wallet cards will be available to download.

<u>Policy Documents</u> – This selection will allow you to view various documents applicable to your inforce coverages such as certificates, policies and renewal letters. Select the document to download.

<u>Admin Options</u> – This is where you may modify or 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.

These changes will be effective immediately.

<u>Download Dental Provider Directory</u> – Groups enrolled for Dental coverage may click on this link and download a Dental 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 spreadsheet by indicating the Directory Format from the dropdown box. After you make the selection of PDF or Excel in the directory format click on *Download Dental Provider Directory* to receive your search results in the format requested.

<u>Request Dental and Vision ID cards</u> – This will route you to *www.kclgroupbenefits.com* where you will enter your group policy number and click submit to receive an electronic ID card.

We appreciate you utilizing our Group Dashboard and hope you found it simple and useful. If you have any questions when utilizing the Group Dashboard, please reach out to your Client Service Representative (CSR), whose contact information appears on your monthly bill.

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Your partner in employee benefits.

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