

# Online Enrolment video transcript

Looking for a fast and easy way to add new plan members to your Group Benefits plan? Look no further! Today, we're going to show you how easy it is to use our Online Enrolment tool.

## **Step 1:** Sign into Benefits Now®

The first thing you will have to do is log onto Benefits Now for Plan Sponsors and enter your email address and password.

## **Step 2:** View plan member directory

From the homepage you will select **Members** from the left-hand side. This will then bring you into your member directory.

## **Step 3:** Add a plan member

Select the **Add New Member** button.

On the right-hand side, you will see "I will invite the plan member to enrol online." Click the **Invite Member** button directly below.

## **Step 4:** Provide employment information

On the **Employment Information** screen, you will need to provide employment information and contact details for the plan member. The email address provided on this screen will be used to send the plan member their welcome email and link to complete their online enrolment process.

All of the fields with an asterisk must be filled in and the check box providing consent must be selected before clicking on the **Save** button.

## **Step 5:** Sending the plan member their enrolment email

Beside the plan members name you will see three links.

The **Update** link allows you to change the information you have just provided.

The **Remove** link will delete the plan member and their information.

The **Send Email** link will send the plan member their welcome email which includes a link to the online enrolment platform.

After clicking the **Send Email** link, the date will display and the enrolment status will be updated to **Email Sent**.

**Step 6:** View the plan members enrolment status

Once the plan member receives their welcome email, they will have seven days to click the link and complete the online enrolment process.

You can conveniently view your plan member's progress by selecting the **Online Enrolment** dashboard and viewing the details under the **Enrolment Status** heading.

- Email Pending = plan member requires welcome email
- Email Sent = welcome email has been sent
- In Progress = plan member has started the online enrolment process
- Pending Install = our administration team is validating the information
- Submitted = plan member has been set up

You will receive notification once the plan member has added their information and completed the process.

**Questions**

If you have any questions or require assistance, please contact our Group Client Service Centre at 1-800-667-8164.