

C-surance allows management of all activities that are associated to the administration of a plan.

All pertinent documents are available to insure proper transmission of all pertinent information to the insurers :

- Detailed invoices,
- Volume summary and number of participants,
- List of employees changes,
- List of system automatic adjustments.



Contract Manager

Searching

Display Contracts with authorized access



Company

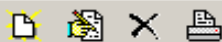
- ABC Company Inc
- BN - joane
- Coimpagnie DEF
- EXPROT INC
- Entreprise Etienne
- Expat ETFS
- Le Groupe Modulaire Inc.
- Mike's Inc
- New EXPAT Inc
- TEST uaher

Contracts Statistics

File: ABC Company Inc

Overview - by Company 2005

Average Age	46	Estimated Monthly Premium	\$31,679.88
Total of certificates	129	Insured Volumes	\$6,124,500.00
Total of disabled Plan members	1		



Insured by	Policy Nbr	Date of Issue	Renewal Date	Termination Date
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Company - (CSR89CLI1) ABC Company Inc

Management
Listings

- List - contract
- List - Employee
- List - invoice
- List - Payroll deductions
- List - Calculation hypothesis
- List - consultant
- List - Renewal analysis

Group Plan Billing records

Search field Search value

Extended search Exact search

Invoice com Company in

Invoice #	From:	To date	Contract #	Grand Total	Amount payable	Amount receivable	Pr
CSR89FAC32	2005/01/01	2005/01/31	*	\$32,093.95	\$32,093.95	\$32,093.95	
CSR89FAC113	2005/02/01	2005/02/28	*	\$32,101.51	\$32,101.51	\$32,101.51	
CSR89FAC116	2005/03/01	2005/03/31	*	\$32,060.21	\$32,060.21	\$32,060.21	
CSR89FAC119	2005/04/01	2005/04/30	*	\$32,080.86	\$32,080.86	\$32,080.86	
CSR89FAC122	2005/05/01	2005/05/31	*	\$32,169.73	\$32,169.73	\$32,169.73	
CSR89FAC125	2005/06/01	2005/06/30	*	\$31,725.38	\$31,725.38	\$31,725.38	
CSR89FAC128	2005/07/01	2005/07/31	*	\$32,464.02	\$32,464.02	\$32,464.02	
CSR89FAC185	2005/08/01	2005/08/31	*	\$32,244.74	\$32,244.74	\$32,244.74	

The operator can easily manage or consult a single invoice or overview all the generated invoices.

Management

Listings

Group insurance billing files

Search field

Search value

Invoice contract

Enterprise invoice

Extended search

Exact search

- Contract listing
- Employee list
- Invoice list
- List of benefit deductions
- List of calculation hypothesis
- Advisor listing
- Financial institutions list

Invoice #	Date from	Date as of	Contract #	Processed on	Type	State	Grand Total	Amount receivable	Amount payable	Balance
CSR89FAC2	2004/01/01	2004/01/31	⋮	2004/11/02	2		\$3,878.84	\$3,878.84	\$3,878.84	\$3,878.84
CSR89FAC4	2004/02/01	2004/02/29	⋮	2004/11/02	2		\$3,878.84	\$3,878.84	\$3,878.84	\$3,878.84
CSR89FAC6	2004/03/01	2004/03/31	⋮	2004/11/02	2		\$3,878.84	\$3,878.84	\$3,878.84	\$3,878.84
CSR89FAC8	2004/04/01	2004/04/30	⋮	2004/11/02	2		\$3,878.84	\$3,878.84	\$3,878.84	\$3,878.84

Enterprise invoice Invoice Number : CSR89FAC10

Invoice # CSR89FAC10
 Enterprise Travel Alberta Inc.
 Date from 2004/05/01
 Date to 2004/05/31
 Processed on 2004/11/02
 Type Enterprise invoice
 State Valdate
 Producer Standard Life
 Send to Travel Alberta Inc.
 Payable by Travel Alberta Inc.
 Payable to Standard Life
 Last transaction
 Balance \$3,878.84
 Total exchanged \$0.00
 Number of parti... 25
 Sub total \$3,878.84
 Total adjustment \$0.00
 Prov ins Tax \$0.00
 Fed ins tax \$0.00
 Total \$3,878.84
 Grand Total \$3,878.84
 Insurer [ABL12566] Standard Life

Group 001 - Division 001

Certificate no.	Name	Surname	SIN	Salary	Status	Class	Coverage LIF	Premium LIF	Adjustment LIF	L
944829442	Benot	Brigitte	244-928-449	\$26,728.00	Active	01	\$54,000.00	\$15.66	\$0.00	
893522362	Berthelot	Michel	263-225-398	\$40,487.00	Active	01	\$81,000.00	\$23.49	\$0.00	
496928692	Boisjoli	Pierre	296-829-694	\$26,278.00	Active	01	\$53,000.00	\$15.37	\$0.00	
795223532	Bolduc	Niclas	235-322-597	\$26,728.00	Terminated	01	\$0.00	\$0.00	\$0.00	
559721912	Bour				Active	01	\$54,000.00	\$15.66	\$0.00	
240026042	Char				Active	01	\$53,000.00	\$15.37	\$0.00	
553625302	Darveau	Gilles Junior	203-526-355	\$26,728.00	Active	01	\$54,000.00	\$15.66	\$0.00	
503625302	Darveau	Sébastien	203-526-305	\$29,240.00	Active	01	\$59,000.00	\$17.11	\$0.00	
426525682	Dion	Pierre	286-525-624	\$44,600.00	Active	01	\$90,000.00	\$26.10	\$0.00	
239920952	Eap	Fich Ponloe	259-029-932	\$26,728.00	Active	01	\$54,000.00	\$15.66	\$0.00	
465724512	Ferguson	Jean-Guy	215-427-564	\$33,280.00	Active	01	\$67,000.00	\$19.43	\$0.00	
429429912	Gagnon	Luc	219-924-924	\$26,728.00	Active	01	\$54,000.00	\$15.66	\$0.00	
791421162	Guay	Yves	261-124-197	\$40,487.00	Active	01	\$81,000.00	\$23.49	\$0.00	
358629822	Hacala	France	228-926-853	\$26,728.00	Active	01	\$54,000.00	\$15.66	\$0.00	
11621172	Lancureux	Myriam	271-126-110	\$24,728.60	Active	01	\$50,000.00	\$14.50	\$0.00	
412429242	Leblanc	Vincent	242-924-214	\$26,728.00	Active	01	\$54,000.00	\$15.66	\$0.00	
147227712	Lesage	Jean-Claude	217-722-741	\$40,000.00	Active	01	\$80,000.00	\$23.20	\$0.00	
593226392	Lévesque	Jean-Marc	293-622-395	\$24,728.60	Active	01	\$50,000.00	\$14.50	\$0.00	

Complete invoice history is available.



- Management
Listings
- List - contract
 - List - Employee
 - List - invoice
 - List - Payroll deductions
 - List - Calculation hypothesis
 - List - consultant
 - List - Renewal analysis

Group Plan Billing records

Search field: Search value:

Extended search Exact search

Invoice contract Company invoice

Invoice #	From:	To date	Contract #	Grand Total	Amount payable	Amount receivable	Processed on	Type	State	Balance
CSR89FAC4	2004/02/01	2004/02/29	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC6	2004/03/01	2004/03/31	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC8	2004/04/01	2004/04/30	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC10	2004/05/01	2004/05/31	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC12	2004/06/01	2004/06/30	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC14	2004/07/01	2004/07/31	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC16	2004/08/01	2004/08/31	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC20	2004/09/01	2004/09/30	*	\$3,878.84	\$3,878.84	\$3,878.84	2004/11/02	2	Validate	\$0.00
CSR89FAC130	2004/10/01	2004/10/31	*	\$4,111.29	\$4,111.29	\$4,111.29	2005/09/29	2	Validate	\$0.00

Company invoice Invoice Nbr : CSR89FAC130

Invoice #	CSR89FAC130
Company	Travel Alberta Inc.
From:	2004/10/01
To:	2004/10/31
Processed on	2005/09/29
Type	Company invoice
State	Validate
Producer	Standard Life
Send to	Travel Alberta Inc.
Payable by	Travel Alberta Inc.
Payable to	Standard Life
Last transaction	
Balance	\$4,111.29
Total exchanged	\$0.00
Number of members	23
Sub total	\$4,097.28
Total adjustment	-\$1.01
Prov ins Tax	\$15.02
Fed ins Tax	\$0.00
Total	\$4,111.29
Grand Total	\$4,111.29

Group	Premium ADD	Adjustment ADD	ADM evidence	Coverage DEP	Premium DEP	Adjustment DEP	Coverage STD	Premiu.
001 - Division 001	\$2.01	\$0.00	<input type="checkbox"/>	N	\$0.00	\$0.00	\$427.00	
002 - Division Laval	\$1.62	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$343.00	
	\$2.43	\$0.00	<input type="checkbox"/>	N	\$0.00	\$0.00	\$520.00	
	\$1.62	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$343.00	
	\$1.50	\$0.00	<input type="checkbox"/>	N	\$0.00	\$0.00	\$318.00	
	\$1.62	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$343.00	
	\$2.40	\$0.00	<input type="checkbox"/>	N	\$0.00	\$0.00	\$513.00	
	\$1.50	\$0.00	<input type="checkbox"/>	N	\$0.00	\$0.00	\$318.00	
	\$1.89	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$401.00	
	\$1.50	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$318.00	
	\$1.11	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$288.00	
	\$1.62	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$343.00	
	\$2.16	\$0.00	<input type="checkbox"/>	F	\$1.75	\$0.00	\$458.00	

The operator can access details of any processed invoice.

Group Plan invoice
ABC Company Inc

Invoice # CSR89FAC122
 Period from 2005/05/01 to 2005/05/31
 Processed 2005/05/27
 Page 1

Plan member name	Salary	Division	LIFE	ADD	STD	LTD	EHC	PD	DC	OLM	Sub total	QST	Ins Tax
Certificate #	SIN	Job status	Class								GST	Total	

Division 001, Edmonton

Asselin, Alexandre	18,950\$	001	38000	38000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
214413411	114-314-412	Active	03	8.74	1.90	0.00	25.50	42.98	32.00	36.49	0.00	147.61	0.00	147.61
Auger, Anne	22,000\$	001	44000	44000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
273472377	773-274-372	Active	03	10.12	2.20	0.00	25.50	42.98	32.00	36.49	0.00	149.29	0.00	149.29
Bastien, Natalina	28,574\$	001	58000	58000	0	* 2500	Ind	Fam	Fam	0	0.00	0.00		
204018411	114-810-402	Active	03	13.34	2.90	0.00	25.50	42.98	0.00	95.36	0.00	180.08	0.00	180.08
Beaudoin, Anik	24,960\$	001	50000	50000	0	* 2500	Fam	Ind	Ind	0	0.00	0.00		
265084588	885-480-562	Active	03	11.50	2.50	0.00	25.50	110.56	32.00	36.49	0.00	218.55	0.00	218.55
Beaudoin, Danièle ***	80,000\$	001	* 100000	* 100000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
230293099	990-392-032	Active	03	23.00	5.00	0.00	25.50	42.98	32.00	36.49	0.00	164.97	0.00	76.10
		Adjustment		0.00	0.00	0.00	0.00	0.00	-30.00	-58.87	0.00	-88.87		
Beaudoin, Pierre	109,200\$	001	0	0	0	0	Ind	Ind	Fam	0	0.00	0.00		
213403300	003-304-312	Active	01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Beaudoin, Sylvie	13,911\$	001	28000	28000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
272071277	772-170-272	Active	03	6.44	1.40	0.00	25.50	42.98	32.00	36.49	0.00	144.81	0.00	144.81
Belleau, Sylvie	56,200\$	001	* 100000	* 100000	721	* 2500	Fam	Fam	Fam	0	0.00	0.00		
263307300	003-703-362	Active	01	23.00	5.00	75.71	25.50	110.56	62.00	95.36	0.00	397.13	0.00	397.13
Bergeron, Pierrette	17,824\$	001	36000	36000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
231939133	331-939-132	Active	03	8.28	1.80	0.00	25.50	42.98	32.00	36.49	0.00	147.05	0.00	147.05
Boulé, Fannie	13,911\$	001	28000	28000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
979421912	219-124-979	Active	03	6.44	1.40	0.00	25.50	42.98	32.00	36.49	0.00	144.81	0.00	144.81
Bédard, Lucie	30,000\$	001	60000	60000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
257538733	337-835-752	Active	03	13.80	3.00	0.00	25.50	42.98	0.00	36.49	0.00	121.77	0.00	121.77
Dion, Catherine	17,606\$	001	36000	36000	0	* 2500	Fam	Fam	Fam	0	0.00	0.00		
614726462	264-627-416	Active	03	8.28	1.80	0.00	25.50	110.56	62.00	95.36	0.00	303.50	0.00	303.50
Doyon, Elise	16,519\$	001	34000	34000	0	* 2500	Fam	Fam	Fam	0	0.00	0.00		
538627882	288-726-835	Active	03	7.82	1.70	0.00	25.00	42.98	32.00	36.49	0.00	144.81	0.00	144.81
Fortier, Solange	17,922\$	001	36000	36000	0	* 2500	Ind	Ind	Ind	0	0.00	0.00		
631621112	211-126-136	Active	03	8.28	1.80	0.00	25.50	42.98	0.00	36.49	0.00	115.05	0.00	115.05
Gendron, Pascale	16,816\$	001	34000	34000	0	* 2500	Fam	Fam	Fam	0	0.00	0.00		
144421492	294-124-441	Active	03	7.82	1.70	0.00	25.50	110.56	62.00	95.36	0.00	302.94	0.00	302.94
Gingras, Isabelle	15,255\$	001	31000	31000	0	* 2500	Fam	Fam	Fam	0	0.00	0.00		
571324142	241-423-175	Active	03	7.13	1.55	0.00	25.50	110.56	62.00	95.36	0.00	302.10	0.00	302.10
Gingras, Sylvain	18,950\$	001	38000	38000	0	* 2500	Fam	Fam	Fam	0	0.00	0.00		
847626782	287-626-748	Active	03	8.74	1.90	0.00	25.50	110.56	0.00	95.36	0.00	242.06	0.00	242.06

An invoice can be generated reflecting the contract conditions.
a. All the essential elements are includes
 i. Salaries
 ii. Volumes
 iii. Premiun
 iv. Taxes
b. Adjustments are clearly identified.
c. A*provides a visual indication that limits can be increased following the acceptance of medical proof.



Group Plan - Invoice summary report
ABC Company Inc

Total	ABC Company Inc								
	<i>LIFE</i>	<i>ADD</i>	<i>STD</i>	<i>LTD</i>	<i>EHC</i>	<i>PD</i>	<i>DC</i>	<i>OLM</i>	<i>Total</i>
Premium without taxes	1405.65	305.58	1419.97	3162.00	10355.04	5592.00	8998.88	57.60	31296.72
Adjustment without taxes	0.00	0.00	0.00	0.00	0.00	30.00	58.87	0.00	88.87
Insured volumes	6111500	6111500	13523	310000				160000	
Invoicable volumes	6111500	6111500	13523	310000				160000	
<i>(Insured / To invoice)</i>									
Single					53 / 48	52 / 43	52 / 48		
Couple					0 / 0	0 / 0	0 / 0		
Single parent					0 / 0	0 / 0	0 / 0		
Family					76 / 75	76 / 68	78 / 76		
Waive					0 / 0	1 / 0	0 / 0		
Total of members	128	128	18	124	129 / 129	128 / 128	130 / 130	8	

Sub total without taxes	\$31,296.72
Total adjustment excluding taxes	\$88.87
Total without taxes	\$31,385.59
Prov ins Tax	\$784.14
Federal sales tax	\$0.00
Provincial sales tax	\$0.00
Grand Total	\$32,169.73

A «resumé» provides a quick overview of the essential elements that were used for calculation.

Changes Report

ABC Company Inc

<i>Plan member name</i>	<i>Date</i>	<i>Reason</i>	<i>Changes</i>
<i>Certificate #</i>	<i>SIN</i>		

Division 001, Edmonton

Beaudoin, Danièle *** 230293099	990392032	2005/03/28 COU	PD status = Individual DC status = Individual
Hamel, Mélanie 100026042	240620001	2005/02/25 COU	DEP eli = No DDD eli = No OLT eli = No PD status = Family EC eli = No DC status = Family EAP eli = No OLS eli = No ODM eli = No ODD eli = No OLD eli = No CTS eli = No

A detailed list of each employee's changes, related to each affected benefit, is automatically generated.

Billing messages
ABC Company Inc

Plan member name

Certificate # SIN

Message from invoicing service

Division 004, Toronto

Beaudoin, Michel

(VIE: Réduction) (DMA: Réduction) (IP: Terminaison) (AM: Terminaison) (MED: Terminaison) (SD: Terminaison) (VFA: Terminaison)

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440-548-001

The system also generates a list of changes that were automatically generated by contract specific events.

For example: A reduction formula can generate an adjustment in the amount of insurance provided and premium following the birthday of an employee.