TABLE OF CONTENTS

CHAPTER 3 - CONTROL PANEL FUNCTIONS	2
Administration management	2
Preferences	
Company files	
Company control buttons	3
New	3
Access a file	
X Delete company file	3
Add a reminder note	4
Add a note to a file	4
Eog	4
Convert a contract into a project	5
Create internet accounts	
Contract information	6
"New" button	6
Carrier change	
History of events	
Events:	
Notes:	
Command line Buttons	8
Hierarchy management	9
Billing process manager –	10
Payroll deduction	10
Renewal manager –	10
Change request manager	
Supervised Change request	13

CHAPTER 3 - CONTROL PANEL FUNCTIONS

Administration management

The access to the "Administration Management" module is done via a specialized "control panel" interface which aims at ensuring that the operator will control each of the relevant administrative information.

Files	Claims Tools	Settings	Help	
👄	h 🔁 🚺] 🖻 😵) 🖷 🥔 ?(🚿 🐧 🔤 🔍 👘	

Preferences

The button will give the user the opportunity to set is personal preferences of operation. The reader is invited to browse through the various tabs as he will be able to define the work space to fit his needs.

Preferences Directory Project Filter Security Email

Company files

The open file button will provide you with a general viewing and access to your various files under management.

迳 Contract Manager				_ 🗆 ×
Searching	Contracts Statistics			
<u>e</u>	File: ABC Company	Inc		
Display Contracts with authorized access		Overview	- by Company 2005	
	Average Age	46	Estimated Monthly Premium	\$31,679.88
🗋 👌 🗙 🛅 🗑 🚱 😫	Total of certificates	129	Insured Volumes	\$6,124,500.00
Company	Total of disabled Plan members	1		
198756 Canada Inc				
ABC Company Inc BN - ioane	📄 🚵 🗙 😓 🕝			
Bois Breton	Insured by	Policy Nbr	Date of Issue Renewal Date	e Termination Date
CB Ubc CS Inc	Standard Life	FA512582	2005/01/01 2007/01/01	
CS Inc CS Inc (1)	Self-Insured	Home12583	2005/01/01 2007/01/01	
Cie France et Richards				
Coimpagnie DEF				
Davidson & Family Inc EXPROT INC				
EXPROT INC. Entreprise Etienne				
Enttreprise VIC				
Expat ETFS				
Le Groupe Modulaire Inc. Mike's Inc				
New EXPAT Inc				
TEST uaher				
TechNic				
test lp				
	1			
۲	General History			

This information is created automatically from your daily activities.

It will thus be easy for you to consult the various panels and tabs to obtain or manage quickly and effectively your essential information.

C-surance.ca Administration 07-03-09 II – 3 - 2 CHAPTER 1 – CONTROL PANEL FUNCTIONS

Confront Manager				-
handre .	Canada Ber	and a second		
	<u>0</u>		Barriales	
Polytopic Contraction and Andromatic and Andropastic Contraction and Andropastic Contractic Contracti		der Angelen 2		
		28t Tear		

You can explore the various top and bottom tabs, as well as control buttons to appreciate the available information.

Contracts Stat			
File:	New EXPAT	Inc	
Filter by	Events		
Date	Events Notes 10:24:41 AM		
2006/10/0	5 10:24:41 AM	Contract Creation:	
ļ			
General Histor	<u>Y</u>		

Company control buttons

The left portion of your screen provides access to each of your files under management as well as the various activities options.

Searching	
	D

You can search for your company using any portion of the name of the enterprise.

Display Contracts with authorized access

contracts to your own personal files.

File can be defined as private or Checking the "Display public. Contracts with authorized access" will include the public







To create new companies file.

Access a file

To access a file you can either double click on the file name or use this open button



GroupConnect 29-12-06

II – 3 - 3 CHAPTER 1 - PANEL CONTROL FUNCTIONS

Delete company file will permanently remove the selected file from you data bank and cannot be retrieved. A warning will appear to remind you before you accept the deletion.

Add Reminder

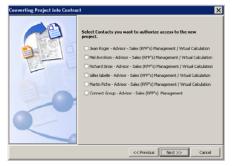
Add a reminder note	Subject
Add a reminder note and recall date to your C- surance.ca agenda. This reminder will be associated to the selected company file.	死Thes New Finna 文 江 」 御 II / 以 発 能 等 潮
Add a note to a file	OK Groet Algent: Created on: 2007/03/16 2:12:19 PM by: Richard Sireis mes New Romain 22 → Algent 2 U Algent E T T
ile access history198756 Canada Inc Archive Archive FAS Demo I Edmonton - Richard Sirois - 2007-02-06 18:08:28 FAS Demo I Edmonton - Richard Sirois - 2007-02-06 09:01:10 Weeks prior Last week Today Demo	ess log button will provide information on sed files.

Convert a contract into a project

This button will allow to you to easily convert a contract into a project. Once selected you will be guided in a step by step procedure to insure that all the needed information will be transferred to the sales module.

You will first need to identify the specific contract that needs to be converted.





You will then be invited to select the dedicated user that will take over the market evaluation processes and finally define the needed dates.

Converting Project into Contrac	et	×
	Complete Project Information Name new Book Project Prevideon & Franky Inc Response Return date Utflettive Date	
	<< Previous Next >> Cancel	

Create internet accounts

C-surance.ca provides an easy tool to create internet accounts for the individual member. This option will provide an easy process to manage each of these accesses.

C Kember List	
Searching	W
User with account X C X C X	Username
Name	
	Password
	Email address
User already has an acco SJ. User doesn't !	ave an account.

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Contract information

For each file, you can create or manage one or more distinct contracts.

	Overview	- by Company 2	2005	
Average Age	46	Estimated Mon	thly Premium	\$31,679.88
Total of certificates	129	Insured Volume	es	\$6,124,500.00
Total of disabled Plan members	1			
🗋 👌 🗙 😓 🧿				
Insured by	Policy Nbr	Date of Issue	Renewal Date	Termination Date
Standard Life Self-Insured	FAS12582 Home12583	2005/01/01 2005/01/01	2007/01/01 2007/01/01	
"New" button The "New" button will ontract to be added to an exiti		ssible to creat		
Contrat à modifier Sélectionnez le nouvel assureur Numéro de police : Date d'émission : Date de renouvelement :	▼ Confirmer Annuler	easy method wizard will a name, policy	for replacing llow you to number as	e » button will insure an an existing carrier. The define the new carrier well as the effective policy will be terminated

Image a changer pour anglaise, dido pour la suivante avec les noms des assureurs en anglais

🗋 🚵 🗙 😓 🙆				
Insured by	Policy Nbr	Date of Issue	Renewal Date	Termination Date
Croix-Bleue	12312313212	2007/04/01	2008/03/31	
MDI DEMO Test Assureur	2342432432	2006/09/01	2007/09/01	2007/03/31

The new contract will inherit all of the previous benefit information, rates and premiums. The user will be responsible to update these information to reflect the terms and condition of the new contract and new carrier.

C-surance.ca Administration 07-03-09 II – 3 - 6 CHAPTER 1 – CONTROL PANEL FUNCTIONS

History of events

ontracts Sta	New EXPAT Inc
File:	
Filter by	Events
Date	Events
2006/10/0	06 10:24:41 AM Contract Creation:
eneral Histo	rv

Two TABs are located at the bottom of the main screen to provide access to:

- 1. General information which also includes the contract status
- 2. The history of events which are split into two options:
 - a. Events
 - b. Notes

Events:

Events are automatically created by the system to keep track of the various activities that were taken by the daily operation.

Notes:

Notes are created by using the button. Once created these notes are read only.

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Command line Buttons

Files	Claims T	Fools Settings	s Help	
🗁	1	📃 🖻 🦉) 🕷 🥙 ?(] 🚿 🐧 🔤 🔍 👘	

Some of the next described icons are available only as options. Consult your adviser **MDI** to obtain more information.

Open files - Screen gives access to the list of your personal contracts as well as the public contracts when the selected option is activated.

h 🗗

Allegroupe private network module.

Billing process manager – This option provides all the needed tools to follow up on billing activities.

Payroll deduction - This option provides all the needed tools to follow up on employer/employee management activities.

Renewal manager - This option provides all the needed tools to follow up on renewal activities.

Claims manager - This option provides a direct access to the adjudication module.

Change request manager - This option provides all the needed tools to follow up on request for changes that are made by supervised users. This is available to SUPERVISOR only.

Electronic agenda to insure follow up of all C-surance.ca activities. This is a private agenda to the owner of the various files.

User Hierarchy – gives access to a management screen allowing full control over the list of all lower level users, the names of their files, their projects, the effective dates as well as their status.

C-surance.ca Administration 07-03-09 II – 3 - 8 CHAPTER 1 – CONTROL PANEL FUNCTIONS

2

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Role Change (if applicable) allow for switching between assigned roles.

Usage Statistics – provides a quick access to the monthly usage information for each user including the number of access and minutes. A sub-menu makes it possible to select previous years for comparative purpose.

Preferences – Allows defining your operating preference:

- Posting of the public files
- Posting of all authorized projects
- Selecting the Font style and size
- Selecting language of operation.

Hierarchy management

This option is designed for larger operators who will need to manage various levels of users. Using this tool a user can control the access of any files that are managed by lower levels. A user cannot access files of equivalent or superior level unless the files are assigned as "**public**".

Files - Authorized Rights			
sers	Files		
 Sirois Richard Roger Jean Jabelle Giles Pabelle Giles Group Connect 	File Name Travel Alberta Inc.		
	Projects		
	Project Name	Effective Date	Status

GroupConnect 29-12-06

B

Billing process manager –

File:							_ 🗆
Selection type Period Today's date	-			m Date 06/03/03		To Date 2007/03/03	• 🖬
Week		Last Period			lext Period		
Period		To Date	Production Date	From Date	To Date	Production Date	
RN - joane Compagnie DEF ABC Company Inc Le Groupe Modulaire Inc. TEST uaher	2006/07/01 2005/04/02 2005/10/01 2006/05/01 2006/08/01	2006/07/31 2006/04/30 2005/10/31 2006/05/31 2006/08/31	2006/07/11 2006/102/21 2006/103/21 2006/105/08 2006/08/21	2006/08/01 2006/05/01 2005/11/01 2005/11/01 2006/06/01 2006/09/01	2006/08/31 2006/05/31 2005/11/30 2006/06/30 2006/09/30	2006/08/11 2006/04/21 2006/07/08 2006/07/08 2006/09/21	
						Γ	Close

This option provides all the needed tools to follow up on billing activities.

Various selection types are available to address your specific needs or method of work.

"Today's date" as well as "Week" will automatically keep the current files to be billed available on your screen, while the "Period" option will provide you with a effective date selection. Once these dates

are selected you must click on the process button to get your needed list.

Payroll deduction -

This option provides all the needed tools to follow up on employer/employee management activities.

Various selection types are available to address your specific needs or method of work.

"Today's date" as well as "Week" will automatically keep the current files to be billed available on your screen, while the "Period"

option will provide you with a effective dates selection. Once these dates are selected you must

click on the process button to get your needed list.

Renewal manager –

This option provides all the needed tools to follow up on renewal activities.

You need to select the period dates and then click on "Search".

You can then access the individual company file by clicking on the company name or any of their contracts by clicking on the actual contract.

From Date: 2006/03/01 To Date: 2007/04/03	ABC Ser BN	mpany C Company Inc vice Auto - joane mpagnie DEF			
Insured by	Policy Nbr		Date of Issue	Renewal Date	Termination Date
Standard Life	FAS12582 Home12583		2005/01/01 2005/01/01	2007/01/01 2007/01/01	

C-surance.ca Administration 07-03-09 II – 3 - 10 CHAPTER 1 – CONTROL PANEL FUNCTIONS

File:									
Selection type				Fro	n Date		To Date		
Period	-			20	06/03/03	-	2007/03/03	-	C -1
Today's date Week		Last Period		-	Ν	Jext Period	·	-	
Period		To Date	Production Date		From Date	To Date	Production Date		
CS Inc BN - joane TEST usher EXPROT INC CS Inc (1) TechNic	2006/04/03 2006/07/01 2006/11/01 2007/01/01	2006/04/18 2006/07/15 2006/11/01 2007/01/07	2006/03/18 2006/06/29 2007/02/07 2007/02/08		2007/01/01 2006/04/19 2006/07/16 2006/07/16 2006/11/01 2006/11/02 2007/01/08	2007/01/08 2006/05/04 2006/07/30 2006/11/08 2006/11/02 2007/01/14	2006/04/04 2006/07/04 2006/11/02 2006/11/04		
								ġ	lose

Change request manager -

This option provides all the needed tools to follow up on request for changes that are made by supervised users. This is available to SUPERVISOR only. Please explore the "Supervised Change request" documentation to view the supervised options and interfaces.

Change Request List						_ 0
File: Le Groupe N	Modulaire Inc.					
iearch field			Sear	ch Value		
Request Status	•		Pen	ding		• <u>p</u>]
Member Name	Created on	Process On	Origin	Priority	Status	1
Denis, Carl	2007/03/10	Concern Concerner III	Allegroupe	Regular	Open	3
lapièrre, Martin	2007/03/10		Allegroupe	Regular	Open	
Change Description	acon - Channe In salary -					
Change Description Liffective date = 2003/08/01 Re	ason : Change in salary	_	_			

Search field	
Request Status	_
All	
Member search	ç
Company Name	
Request Status	a
Request Origin	
Priority	

The lists are available based on various search fields or search values that adapt to the various needs of users.

Search Value		
Pending	-	C71
Accept		
Pending		
Rejected		

Request# 276 Employe Denis, C	Carl	Source Allegroupe Status Suspend	Created by YeurXPRO Administrator	FAS Request date 2007/03/10 Process date
Employee Chang	1 6	nd Beneficiaries		Functions
Effective date Code change Job status	2003/07/09 2003/08/01 Change in salary Active	Requested exit Division Class Module	001 - 001 01 - Employés (tous) Mod A - Module A	Calculation Calculation Calculation Printing Print
Insured salary Real salary	44500 44500			Close
Ben Adm Status LIF - V 0 ADD - V 0 STD - V 0 LTD - V 0 EHC - V F PD - V F	s Evidence Granitation	Muk/ units F	iexibie State	

Once you have selected an item, the system will display that information in the same format as the supervised user created the request for change.

The light bleu color will highlight the changes that where requested.

🜔 Empla	yee request for change					_ 🗆 🗙
Request#	276	Source	Allegroupe	Created by	YeurXPR0,FAS	Request date 2007/03/10
Employe	Denis, Carl	Status	Suspend	Administrator		Process date

important information on the displayed transaction. The transaction number, the source, the involved users as well as the dates of process are available to insure tracking of activities.



The supervisor will have a list of various actions that can be taken on each request for changes. Including Approval, Refusal, keep pending, delete, calculate or print.

GroupConnect 29-12-06

The top banner includes very

II – 3 - 11 Chapter 1 – Panel control functions

Approved Once "approved" the change will become active in real time and will be added to the employee list of movement.

The object of this tool is to overview every request for changes that were made by supervised users.

Supervised Change request

Supervised Change request

	🚧 Employee file			Search field	Search value			
	_			Extended search	C Exact search			
List - Employee	⊖ C E	à 🛆 🏠 🗈						
	Employee #	Last name	First ner	e Division	Class	Certificate #	Starting #	+
	1	Florent	Richard	001	01	111111111		-
	2	Latour	Pierre	001	01			
	3	Latendresse	Gabriel	001	01			
	4	lacombe	Richard	001	01	223233333		
	5	Denis	Carl	001	01	4444444		
	6	lapièrre	Martin	001	01			

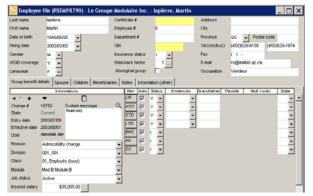
An authorized user can make request for changes that will be supervised.

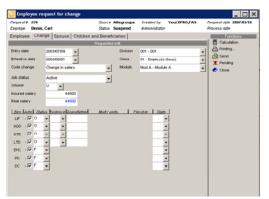
In order to ease the processes for the supervised user, C-surance.ca will provide a simplified interface.

For one the user will get a subset of the standard available change and management options.

These will limit his activities to:

- Viewing history event by using the < and > arrows
- To creation of a request for change when clicking on the + instead of making a change.





Clicking on the button will display a new simplified screen with 4 tabs options.

Employee Change Spouse Children and Beneficiaries

Each of these tab options will provide the user with the opportunity to make any required changes.

The user will also be presented with 5 available functions. The first will allow for a quick Calculation of the displayed file. This is can be useful to get before and after scenarios or to create "what if" scenarios.

Once calculated the printing option will provide with an individual member real time report.

Once the task is completed the user can select to either:

- "Send" the request for change to the supervisor
 - Leave the transaction "pending" for further awaiting for further instruction from the member or
 - o "Close" the transaction ignoring all requested changes.

GroupConnect 29-12-06

II – 3 - 13 Chapter 1 – Panel Control functions

Functions
Calculation
🚔 Printing
🖨 Send
🗶 Pending
🛷 Close