Spec sheet

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro

Others

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Activate the system of letters							
XML export						*	*
Data Export to payroll system * B				*	*	*	*
Export of plans in the public databank							*
Logo managment	*	*	*	*	*	*	*
Import of plans from the public databank	*	*	*	*	*	*	*
Label printing of employees * B					*	*	*
Electronic transfer of changes with carrier				*	*	*	*

Entreprise

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Activate calculation bank					*	*	*
Activate virtual calculation of invoice *B	*	*	*	*	*	*	*
Activate virtual calculation of employer/employee contribution *B	*	*	*	*	*	*	*
Virtual calculation employees summary *B					*	*	*
Health spending account - Transactions				*	*	*	*
Health spending account - Client only				*	*	*	*
Health spending account - Bank account				*	*	*	*
Health spending account - Invoicing				*	*	*	*
Health spending account - Check direct print				*	*	*	*
Health spending account - Check payment				*	*	*	*
Employer's contribution by wages					*	*	*
Employer's contribution configuration						*	*
Employer's contribution administration fees					*	*	*
Employer's contribution maintenance						*	*
Employer's contribution flex mode							*
Employer's contribution with fixed amount	*	*	*	*	*	*	*
Employer's contribution by benefit						*	*
Employer's contribution by premium	*	*	*	*	*	*	*
Employer's contribution by status							*
Employer's contribution referred							*
Contribution variable amount by ins. status							*
Calculation engine - Group calculation	*	*	*	*	*	*	*
Calculation engine - Force calculation	*	*	*	*	*	*	*
Calculation engine - Process date manager	*	*	*	*	*	*	*
Calculation engine - Reverse calculation	*	*	*	*	*	*	*
Calculation engine - Resetting	*	*	*	*	*	*	*

Role: Advisor - Global Value - management

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Calculation engine - Event control	*	*	*	*	*	*	*
Utility functions	*	*	*	*	*	*	*
Accounting management * B							*
Health spending account management				*	*	*	*
Manage employer's contributions * B	*	*	*	*	*	*	*
Manage social costs * B							*
Manage divisions/classes * B	*	*	*	*	*	*	*
Manage insurance modules * B					*	*	*
Manage sponsor contacts* B					*	*	*
Manage the advisor/sponsor relations * B						*	*
Automated function managment	*	*	*	*	*	*	*
Manage journal events * B							
Manage and edit sponsor * B	IU	IU	IU	IU	IU	IU	IU
Printing of sponsor file	*	*	*	*	*	*	*
Kronos WEB							
Parameters of events*B	*	*	*	*	*	*	*
Parameters of events*B	*	*	*	*	*	*	*
Default values premium and commissions							*
Premiums and commissions evaluation							*

Projects

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Conversion into active contract	*	*	*	*	*	*	*
Project copy	*	*	*	*	*	*	*
Scheduler worksheet							*
TPA Management							*
Claims history Management * B	*	*	*	*	*	*	*
Commission management						*	*
Manage the RFP's plan templates	*	*	*	*	*	*	*
Manage plan templates	O	O	O	O	O	O	*
Rates history management * B	*	*	*	*	*	*	*
Manage paramedical additional info (old structure)							
Manage paramedical additional info (new structure)	*	*	*	*	*	*	*
Project management and edit * B	U	U	U	U	U	U	U
Rates history - export to Excel - project							*
Rates history - import from Excel - project							*
Claims history - export to Excel - project							*
Claims history - import from Excel - project							*
Printing of project	*	*	*	*	*	*	*

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Carrier notes	O	O	O	O	O	O	O
Advisor notes					*	*	*
Project options					*	*	*
Simplified input project	*	*	*	*	*	*	*
Simplified input only project	*	*	*	*	*	*	*
Basic statistics				*	*	*	*
Synchronize project data					*	*	*
Access template plans	*	*	*	*	*	*	*
Edit benefits	*	*	*	*	*	*	*

Project analisys

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Automatic calculation of volumes for comparative rating analysis	*	*	*	*	*	*	*
Hypothesis calculation access from the project analysis module	*	*	*	*	*	*	*
Rate export to benefits	*	*	*	*	*	*	*
Manage analysis configurations						*	*
Management and edit of analysis * B	*	*	*	*	*	*	*
Rate import from benefits	*	*	*	*	*	*	*
Printing of project analysis	*	*	*	*	*	*	*
Note on project analysis					*	*	*
Monthly report	*	*	*	*	*	*	*
Pay period report	*	*	*	*	*	*	*
Project summary report							*
Summary report by employee					*	*	*
Highlight of the differences on analysis report					*	*	*
Access analysis configurations	*	*	*	*	*	*	*
Monthly comparative report					*	*	*
By pay period comparative report					*	*	*

Contract

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Activate contract self invoicing				*	*	*	*
Activate contract basic fees management					*	*	*
Activate contract claims management							*
Demographic analysis							*
Convert into contract/project			*	*	*	*	*
Scheduler worksheet							*
Manage TPA contract							*
Manage contract commissions							*
Manage the basic commissions without invoicing					*	*	*

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Manage the contracts in flex mode * B							*
Manage benefits templates	O	O	O	O	*	*	*
Manage contract templates	O	O	O	O	O	O	*
Manage contract claim history * B	*	*	*	*	*	*	*
Manage contract rate history * B	*	*	*	*	*	*	*
Manage paramedical additional info (old structure)							
Manage paramedical additional info (new structure)	*	*	*	*	*	*	*
Manage invoicing configuration	*	*	*	*	*	*	*
Manage business rules on employee changes							*
Manage and edit contract * B			UD	UD	UD	UD	UD
Management multi contract					*	*	*
Claims history - import from Excel - contract							*
Rates history - export to Excel - contract							*
Rates history - import from Excel - contract							*
Claims history - export to Excel - contract							*
Printing of contract			*	*	*	*	*
Note for carrier	O	O	O	O	O	O	O
Note for advisor					*	*	*
Simplified input contract	*	*	*	*	*	*	*
Simplified input only contract	*	*	*	*	*	*	*
Basic statistics	*	*	*	*	*	*	*
Access contract templates	*	*	*	*	*	*	*
Edit contract benefits	*	*	*	*	*	*	*

Employee

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Access to invoicing history				*	*	*	*
Access to employer/employee contribution history				*	*	*	*
Quick calculation	*	*	*	*	*	*	*
Automatic changes trigger following an event				*	*	*	*
Manage employees accounting							*
Manage exoneration list				*	*	*	*
Manage pending enrolment list				*	*	*	*
Manage and edit beneficiaries				*	*	*	*
Manage and edit employees * B	*	*	*	*	*	*	*
Manage and edit dependant				*	*	*	*
Manage and edit spouse				*	*	*	*
Report generator of employees information						*	*
History of changes	*	*	*	*	*	*	*

Spec sheet

Role: Advisor - Global Value - management

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Contract printing in individual invoicing mode				*	*	*	*
Summarized printing of coverage's and costs	*	*	*	*	*	*	*
Manage employee's banking information						*	*
Notes on employees				*	*	*	*
Employees cumulative report	*	*	*	*	*	*	*
Employee billing report	*	*	*	*	*	*	*
Follow-up of proof of health				*	*	*	*
Manage employees disabilities					*	*	*
Internet security for WEB module	*	*	*	*	*	*	*
Access request for change module					*	*	*
Utility for wage calculation	*	*	*	*	*	*	*
Data validation of file	*	*	*	*	*	*	*
View wages	*	*	*	*	*	*	*
Access list of employees Editor	*	*	*	*	*	*	*
Employee editor : export PDF	*	*	*	*	*	*	*
Employee editor : export XLS				*	*	*	*
Employee editor : export to Allegroupe	*	*	*	*	*	*	*
Employee editor : Manage the visible columns	*	*	*	*	*	*	*
Employee editor : import from external files	*	*	*	*	*	*	*
Employee editor : import from Allegroupe	*	*	*	*	*	*	*
Changes Edit	*	*	*	*	*	*	*
Administration of requests for change					*	*	*

Billing

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Activate virtual calculation of invoice *B	*	*	*	*	*	*	*
Manage accounting/invoice							*
Manage invoicing * B				*	*	*	*
Manage PAP							*
Manage group accounts							
Manage accounting events							*
Printing of invoice				*	*	*	*
Printing of changes report				*	*	*	*
Print and view wages				*	*	*	*
Printing for carrier				*	*	*	*
Printing for sponsor				*	*	*	*
Billing report variable period							*
Select division for printing					*	*	*
Validation of invoice				*	*	*	*

Spec sheet

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Payroll deductions							
Activate virtual calculation of employer/employee contribution *B	*	*	*	*	*	*	*
Virtual calculation employees summary *B					*	*	*
ASCII conversion for payroll system					*	*	*
Manage employer/employee contribution * B				*	*	*	*
Print contribution differences since previous report				*	*	*	*
Printing of contribution * B-ENTERPRISE				*	*	*	*
Printing of cumulative report * B-ENTERPRISE				*	*	*	*
Process by division					*	*	*
What if scenario							
Employees data export to current file							*
Management and edit of What if scenarios * B						*	*
Employees data import from current file						*	*
Printing of What if scenarios	*	*	*	*	*	*	*
Fiscal impact comparative report							*
Detailed fiscal expenses report							*
Carrier							
Accounting							
Manage carrier contact							*
Manage and edit carrier * B							*
Printing of carrier file							*
Advisor							
Advisor accounting							*
Manage advisors							*
Manage and edit distribution centers * B							*
Banking institutions							
Management and edit of banking institutions * B							*
Gap							
Administration C-SURANCE							
Administration MDI							
Gap - Access sponsors data	*	*	*	*	*	*	*

![GAP e-surance.ca logo]

Spec sheet

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Gap - Contract Management	*	*	*	*	*	*	*
Gap - Project Management	*	*	*	*	*	*	*
Gap - Renewal management				*	*	*	*
Gap - Manage request for change					*	*	*
Gap - Hierarchy user							*
Gap - Import/Export of contracts				*	*	*	*
Gap - Import/Export of projects	*	*	*	*	*	*	*
Manage producers	*	*	*	*	*	*	*
Manage customers statistics							*
Roles management and checking							
Data exchanges							

Claims

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Access to employee file							*
Access to employer file							*
Access to plan assignment							*
Access to claim administrator							
Access to list of items of a pending batch							*
Access to search list of reversed checks							*
Access to search list of requested STD checks reversal							*
Access to search list of requested checks reversal							*
Access to search list of requested STD re-issuance checks							*
Access to search list of requested re-issuance checks							*
Access to search list of historical batches							*
Access to search list of pending batches							*
Access to search list of past transactions							*
Access to search list of approved STD checks							*
Access to search list of pending approval STD checks							*
Access to search list of reversed STD checks	*	*	*	*	*	*	*
Access to search list by member							*
Access to list of STD checks not issued							*
Access to list of STD checks not approved							*
Access to list of historical batches							*
Access to the global list of individual bank values							*
Account assignment manager							*
							*
Claims management							*
Individual member HSA manager							*

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Check setup manager							*
Room providers list manager (provider, type of room, pricing (min, max and average)							*
Manual messages list manager							*
Country and province list manager							*
Manage required check production							*
Manage experience RESET							*
Manage check re-issuance							*
							*
Special acceptance management							*
Management of accumulator							*
Manage Dental coding							*
Manage bank account							*
Manage reversal request of check previously issued							*
Manage STD reversal request							*
Manage re-issuance request of check previously issued							*
Manage STD re-issuance request							*
Manage HSA items in pending batch							*
Manage denturology items of pending batch							*
Manage EHC paramedical items in pending batch							*
Manage dental care items in pending batch							*
Manage drug items in pending batch							*
Manage bank reconciliation batches							*
Manage pending batches							*
Note Manager							*
Priority Note Manager							*
Manage STD configuration							*
Manage coverage configuration							*
Manage EHC plans							*
Manage Dental plans							*
Manage Denturology plans							*
Manage Drug plans							*
Manage Enterprise global preferences							*
Manage Individual preferences							*
Manage check reversal							*
Manage Claims							*
Manage EDI Claims							*
Manage medical services							*
Manage drug tables							*
Manage dental acts rating							*

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Manage past dynamic transactions							*
Manage usual and customary							*
Manage STD file (Short term disability)							*
Manage individual dental processes (teeth)							*
Manage batch reversal pending payment that check was issued or not							*
Manage and select provider							*
Import of AQPP drug list							*
Import of Medilist drug list							*
Printing of historical batches and items							*
Printing of pending batches and items							*
							*
							*
							*
Claim report by contract							*
Claim report by certificate							*
STD report (only if STD is active)							*
List of checks to be issued report							*
Individual member Drug payment report for Medilist							*
Pending STD file report							*
Semi detailed STD claims report							*
Medical services report							*
Historical STD report							*
Statement 22 report							*
Reverse STD that is pending reversal							*
Payment request of a single item with large claim value							*
Payment request with a batch including an large claim value							*
Process payment request from a pending batch							*
View EHC plan details							*

Renewal analysis

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Import claim history data							*
Printing renewal analysis							*
Edit renewal analysis							*
Edit technical results							*

Role: Advisor - Global Value - management	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro