Spec sheet

Role: *Advisor - Sales (RFP''s) Management / Virtual Calculation*

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Others							
Activate the system of letters							
Data Export to payroll system * B							
Export of plans in the public databank							
Import of plans from the public databank	*	*	*	*	*	*	*
Label printing of employees * B							
Electronic transfer of changes with carrier							
Entreprise							
Activate calculation bank							
Activate virtual calculation of invoice *B							
Activate virtual calculation of invoice *B							
Activate virtual calculation of employer/employee contribution *B							
Activate virtual calculation of employer/employee contribution *B							
Virtual calculation employees summary *B							
Virtual calculation employees summary *B							
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							
Calculation engine - Group calculation							
Calculation engine - Force calculation							
Calculation engine - Process date manager							
Calculation engine - Reverse calculation							
Calculation engine - Resetting							
Calculation engine - Event control							
Utility functions							
Accounting management * B							
Manage employer's contributions * B	*	*	*	*	*	*	*
Manage social costs * B							*
Manage divisions/classes * B	*	*	*	*	*	*	*

Spec sheet

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Manage insurance modules * B					*	*	*
Manage sponsor contacts* B					*	*	*
Manage the advisor/sponsor relations * B						*	*
Manage journal events * B							
Manage and edit sponsor * B	IU	IU	IU	IU	IU	IU	IU
Printing of sponsor file	*	*	*	*	*	*	*
Parameters of events*B							
Parameters of events*B							

Projects

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Conversion into active contract	*	*	*	*	*	*	*
Project copy	*	*	*	*	*	*	*
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
Printing of project	*	*	*	*	*	*	*
Carrier notes	O	O	O	O	O	O	O
Advisor notes					*	*	*
Project options					*	*	*
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	*	*	*	*	*	*	*

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Note on project analysis					*	*	*
Monthly report	*	*	*	*	*	*	*
Pay period report	*	*	*	*	*	*	*
Summary report by employee					*	*	*
Highlight of the differences on analysis report					*	*	*
Access analysis configurations	*	*	*	*	*	*	*
Monthly comparative report					*	*	*
By pay period comparative report					*	*	*

Contract

Activate contract self invoicing							
Activate contract basic fees management							
Activate contract claims management							
Convert into contract/project							
Manage TPA contract							
Manage contract commissions							
Manage the basic commissions without invoicing							
Manage the contracts in flex mode * B							
Manage benefits templates							
Manage contract templates							
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							
Management multi contract							
Printing of contract							
Note for carrier							
Note for advisor							
Basic statistics							
Access contract templates							
Edit contract benefits							

Employee

Access to invoicing history							
Access to employer/employee contribution history							

Spec sheet

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
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							
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

Manage accounting/invoice	|	|	|	|	|	|	|
Manage invoicing * B							
Manage PAP							

Spec sheet

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Manage group accounts							
Manage accounting events							
Printing of invoice							
Printing of changes report							
Print and view wages							
Printing for carrier							
Printing for sponsor							
Select division for printing							
Validation of invoice							

Payroll deductions

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
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

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
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

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Accounting							
Manage carrier contact							
Manage and edit carrier * B							
Printing of carrier file							

Advisor

	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Advisor accounting							
Manage advisors								*
Manage and edit distribution centers * B							

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Banking institutions							
Management and edit of banking institutions * B							
Gap							
Administration C-SURANCE							
Administration MDI							
Gap - Access sponsors data	*	*	*	*	*	*	*
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							
Access to employee file							
Access to employer file							
Access to plan assignment							
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							

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
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							
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							

Spec sheet

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Manage Individual preferences							
Manage check reversal							
Manage Claims							
Manage EDI Claims							
Manage medical services							
Manage drug tables							
Manage dental acts rating							
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							*

Role: Advisor - Sales (RFP''s) Management / Virtual Calculation	Base 250	Base 500	Base 1000	Base Plus	Advanc	Pro	XPro
Printing renewal analysis							*
Edit renewal analysis							*
Edit technical results							*

Security attributes Index:
* : Insert;Update;Delete   IU : Insert;Update
O : Read Only   UD : Update;Delete
U : Update   ID: Insert;Delete
I : Insert
D : Delete

Configuration file created on the 2007/03/19. The listed setting could vary based on evolving needs.
This table contain non legal value