

# C-surance: Special procedures to start a group in mid month

This documentation will provide a special procedure for situation where a contract is to be effective in mid month and the invoicing period needs to be the 1<sup>st</sup> of each month.

In such a situation we would need to issue the first billing for the pro-rated portion of the first month, and then bill the following month on a monthly basis.

To help fully understand this procedure, we will provide a step by step description of a sample case where the group billing starts on the 15<sup>th</sup> of February. The February invoice must only include the premiums for the 15 to the 28<sup>th</sup> period.

## 1. Divisions/classes configuration

Ensure you have the right Fiscal Start and End Date for each of the Divisions.

The End date must be empty.

The screenshot shows a software interface titled "Division(s) / Class(es) - Noramtec Consultants inc.". It features two main tables: "Divisions" and "Classes".

Divisions			Classes
Division #	Description	External #	Class #
▶ 1	Excess Plan		▶ 1
2	Full Plan		
3	Full Plan - non canadian		

Below the tables, there are several input fields and dropdown menus:

- Creation date: 2006/12/01
- End date: (empty)
- Start Date - fiscal year: 2007/01/01
- End date - fiscal year: 2007/12/31
- No of annual payroll deductions: 52
- Nbr of deductions executed: (empty)

At the bottom, there is an address section:

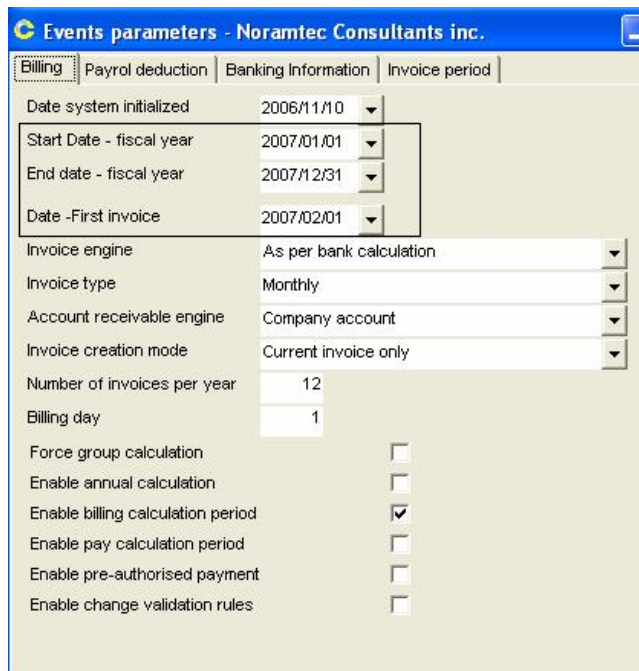
Address: 2055 Peel - Suite 625  
City: Montreal  
Province: QC  
Postal code: H3A 1V4

There is also a "Copy company address" button and a vertical menu on the right with options: Admini, Accou, and Benefit.

## 2. Events Parameters

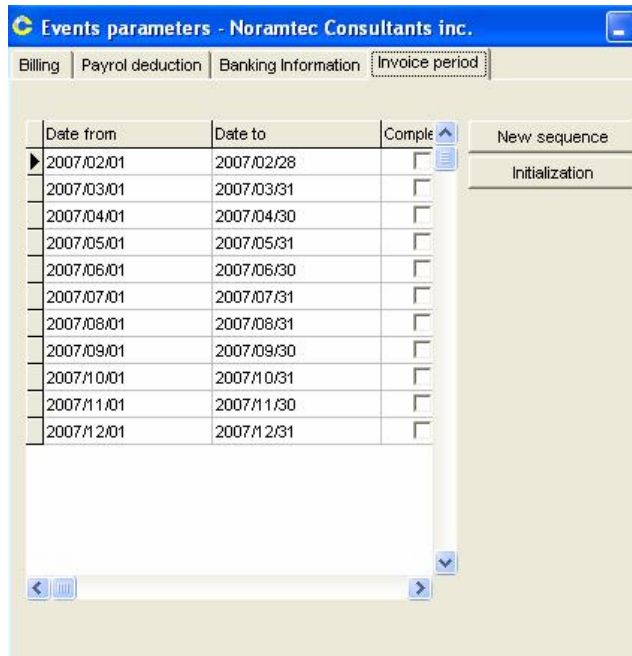
The fiscal year Start and End dates as well as the date of the first invoice are very important. The date – First invoice should be the 1<sup>st</sup> of the starting month.

Set the Invoice engine “As per bank calculation”.



Events parameters - Noramtec Consultants inc.	
Billing	Payrol deduction   Banking Information   Invoice period
Date system initialized	2006/11/10
Start Date - fiscal year	2007/01/01
End date - fiscal year	2007/12/31
Date -First invoice	2007/02/01
Invoice engine	As per bank calculation
Invoice type	Monthly
Account receivable engine	Company account
Invoice creation mode	Current invoice only
Number of invoices per year	12
Billing day	1
Force group calculation	<input type="checkbox"/>
Enable annual calculation	<input type="checkbox"/>
Enable billing calculation period	<input checked="" type="checkbox"/>
Enable pay calculation period	<input type="checkbox"/>
Enable pre-authorized payment	<input type="checkbox"/>
Enable change validation rules	<input type="checkbox"/>

Select the "Invoice period" tab and then click on "Initialization". Ensure that the first period of the list corresponds to the first invoice to be produced.



### 3. Employees Configuration (Very important)

The effective date of the first change (enrolment) for each employee must be the first date of billing. In our case must be 2007/02/15.

**Employee file (CSR211EMP23) - Noramtec Consultants inc. - Amin, Harry**

Last name	Amin	Certificate #	9999
First name	Harry	Employee #	9999
Date of birth	1946/07/17	Department #	999
Hiring date	2004/01/30	SIN	999 999 999
Gender	M	Insurance status	I
WSIB coverage	N	Hold-back factor	1
Language		Aboriginal group	<input type="checkbox"/>

Group benefit details | Spouse | Children | Beneficiaries | Notes | Information (other)

Informations		Ben	Adm	Status	vidences	Gran
Change #	20	EHC	<input checked="" type="checkbox"/>	I		
State	Current					
Entry date	2006/11/17					
Effective date	2007/02/15					
User	Admin					
Reason	Admissibility change					
Division	2, Full Plan					
Class	1, Employee (all)					
Job status	Active					
Insured salary	22 222.00 \$					
Real salary						
Smoker						
Auto. eligibility	<input checked="" type="checkbox"/>					

## 4. Contract and Benefits Configuration

The issuance date MUST be the same as the first day to be invoiced.

**Group plan contract - Noramtec Consulta**

Informations | Settings | Benefits | Notes | Documents

Identification and basic information

**Company** Noramtec Consultants inc.

**Carrier** ETFS

Enable contract

Policy # 45166645

Issuance date	2007/02/15	▼
Renewal date	2008/02/01	▼

Expiry date ▼

Structure type Division/Class ▼

Production language E ▼

Yearly value

Notes

Configure the “Process – Change condition” setting to “Prorata of effective days”. This setting could be change, once the first invoice is issued and validated to fit the remaining periods of the contract.

Group plan contract - Noramtec Consultants inc.

Informations Settings Benefits Notes Documentation (fren

Settings

Process - Enrollment

- Based on hiring date
- Manual activation

Process - Change...

- First day of following month
- Pro rata of effective days
- Pro rata (30 days)
- First or 15 of month

Enable self administration

Enable TPA fees

Enable commissions

Enable single charge

Enable billing - accounting (company)

Enable billing - accounting (carrier)

Enable distribution center accounting

Enable claims system

The effective date of each Benefit element must be set at the 2007/02/01. **This must be the first movement of each benefit.**

Extended health care - Policy # : 45166645 - Noramtec Consultants inc.

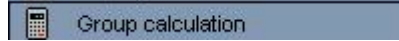
Division(s) / Class(es) Division : 1 Excess Plan

Entry date 2006/11/16 Plan name Plan 1, \*

Effective date 2007/02/01 Reason Contract emission

Coverage	Deductible		Grouped	
	Without DEP	With DEP		
Out of province <input checked="" type="checkbox"/>	0.00 \$	0.00 \$	<input type="checkbox"/>	100%
Hospital <input checked="" type="checkbox"/>	0.00 \$	0.00 \$	<input type="checkbox"/>	100%

## 5. Group Calculation



Before you generate the Group Calculation, the tables used for calculation MUST be empty in order to ensure the integrity of the data.

In case of doubt contact MDI. This procedure takes a few minute to process.

NB. Should you not find the "Group Calculation" button on your management option, first ensure that you have properly set the Invoice engine "As per bank calculation". If this is correct and you still cannot find the button, simply exit this client file and reenter it.

## 6. Billing issuance

Generate the first invoice; ensure that the end result is accurate before validation.

## 7. SET Configuration of contract

**Once done, make sure you reconfigure your "Process – Change condition" setting to respond to your need for the remaining of the contract (See figure 4.2).**