



Spec sheet

	Super Lite	Lite	Elite	Elite +
--	---------------	------	-------	---------

CRM (Client Relation Manager)

Personalize Control Panel				
- Dedicated Control Panel based on user needs and authorisation	*	*	*	*
- Controlled access to client/prospect				
- Agenda	*	*	*	*
- Statistical information			*	*
- Log of activities	*	*	*	*
- Personalized notes	*	*	*	*
- Event management	*	*	*	*
Search and Select of data	*	*	*	*
Corporate intra E-mail	*	*	*	*
E-mail to carriers and clients	*	*	*	*
Access to system message	*	*	*	*
Access to the enriched text editor	*	*	*	*
Microsoft Office integration	*	*	*	*

Enterprise

Manage sponsor	*	*	*	*
Manage the SIC codes	*	*	*	*
Natives specific management	*	*	*	*
Printing of sponsor file	*	*	*	*
Manage divisions/classes	*	*	*	*

Manage employer's/employee's contributions

		*	*	*
- fixed amount		*	*	*
- by premium		*	*	*

Employee

Manage employees	*	*	*	*
Utility for wage calculation	*	*		*
Manage dependant			*	*
Manage beneficiaries			*	*
Manage spouse			*	*
History of changes			*	*
Employees list Editor			*	*
- import from XLS files			*	*
- import from Allegroupe			*	*
- export PDF			*	*
- export XLS			*	*
- export to Allegroupe			*	*
- Manage the visible columns			*	*



Spec sheet

	Super Lite	Lite	Elite	Elite +
Benefits Management	*	*	*	*
Benefits Management	8	8	33	33
Simplified input Benefits	*	*	*	*
Simplified input Benefits only	*	*		
Manage benefits templates / Simplified	*	*	*	*
Convert into contract/project/contract	*	*	*	*
Manage paramedical		*	*	*
Manage DDD limits		*	*	*
Manage Hospitalization limits		*	*	*
Manage other medical limits		*	*	*
Manage Critical Illness List			*	*
Access industry template plans			*	*
History				
Rates history management	*	*	*	*
Claim history management	*	*	*	*



Spec sheet

	Super Lite	Lite	Elite	Elite +
--	---------------	------	-------	---------

ADMINISTRATION

CRM (Client Relation Manager)

Basic statistics	*	*	*	*
Simplified rates analysis	*	*	*	*
Printing of contract	*	*	*	*
Contract History of events			*	*
Summary printing of coverage's and costs by employer		*	*	*
Virtual calculation of invoice	*	*	*	*
Virtual calculation of employer/employee contribution		*	*	*
Virtual calculation employees summary				
Manage journal events			*	*
Automated function management			*	*
Company admin notes			*	*
Activate contract basic fees management				*

Employee

Data validation of file	*	*	*	*
Summarized printing of coverage's and costs	*	*	*	*
Quick calculation	*	*	*	*
History of events		*	*	*
Manage exoneration list			*	*
Manage request for change			*	*
Manage pending enrolment list			*	*
Automatic changes trigger following an event			*	*
Access to invoicing history				*
Access to employer/employee contribution history				*
Employee billing report				*
Employees cumulative report				*

Others

XML export	*	*	*	*
Renewal management			*	*



Spec sheet

Super
Lite Lite Elite Elite +

Billing

Manage invoicing configuration				*
Activate contract self invoicing				*
Advance calculation bank				*
Calculation engine				*
- Group calculation				*
- Balance calculation				*
- Force calculation				*
- Process date manager				*
- Reverse calculation				*
- Resetting				*
- Event control				*
Option to Validate invoice before closing				*
Printing				*
- of invoice				*
- of changes report				*
- option to view wages				*
- for carrier				*
- for sponsor				*
- Select division				*
Parameters of events				*

Payroll deductions

Manage employer/employee contribution				*
Printing :				
- of contribution				*
- of cumulative report				*
- of differences since previous report				*



Spec sheet

	Super Lite	Lite	Elite	Elite +
--	---------------	------	-------	---------

SALES

CRM (Client Relation Manager)

Professional sale control panel	*	*	*	*
Segmentation of sales status	*	*	*	*
Follow up on 6 important dates	*	*	*	*
Automatic tracking of events	*	*	*	*
Pie chart graphic of sale status	*	*	*	*

RFP

Total management of RFP info	*	*	*	*
Predefine documents management and selection	*	*	*	*
Printing of RFP	*	*	*	*
Automatic email of RFP to preferred underwriter	*	*	*	*
Follow up of RFP	*	*	*	*
Status management	*	*	*	*
Basic statistics	*	*	*	*
Convert RFP in current contract			*	*
Conversion into active contract	*	*	*	*

Project analysis

Manage analysis	*	*	*	*
Access analysis configurations	*	*	*	*
Select up to 4 analysis pre-defined configuration	*	*	*	*
Automatic calculation of volumes for comparative rating analysis	*	*	*	*
Printing of comparative analysis	*	*	*	*
- 1 to 4 plan	*	*	*	*
- compare benefits	*	*	*	*
- compare volume	*	*	*	*
- compare rates	*	*	*	*
- compare premiums	*	*	*	*
Rate export to benefits	*	*	*	*
Monthly report (what if billing)	*	*	*	*
Pay period report (employer/employee)		*	*	*
Note on project analysis				



Spec sheet

Super			
Lite	Lite	Elite	Elite +

Health Spending Account Management

Option

Current HSA amount	*	*
Carry forward	*	*
Take over	*	*
Grace period	*	*
Waiting period	*	*
Contribution mode (Fix, % salary, manual)	*	*
Distribution Schedule (1,2,3,4,6,12 time a year)	*	*
Distribution mode (with distribution/on payment received)	*	*
Billing mode (Distribution or paid claim)	*	*
Tax management	*	*
Administration fees (\$, % with maximum)	*	*
Balance Alert	*	*
Balance automatic stop payment	*	*
Reporting and Statement	*	*
Employee complete history of events	*	*
Check direct print	*	*
Check payment	*	*

