Spec sheet

CRM (Client Relation Manager)

	Super Lite	Lite	Base	Advance	Pro	XPro
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	*	*	*	*	*	*
Manage producers				*	*	*
Logo management						*
Scheduler worksheet						*
Hierarchy user						*
Enterprise						
Manage sponsor	*	*	*	*	*	*
Manage the SIC codes	*	*	*	*	*	*
Natives specific management	*	*	*	*	*	*
Printing of sponsor file	*	*	*	*	*	*
Manage divisions/classes	*	*	*	*	*	*
Manage insurance modules				*	*	*
Manage sponsor contacts				*	*	*
Manage the advisor/sponsor relations					*	*
Manage employer's/employee's contributions		*	*	*	*	*
- fixed amount		*	*	*	*	*
- by premium		*	*	*	*	*
- by wages				*	*	*
- configuration manual					*	*
- by benefit					*	*
- by status						*
- referred						*
- variable amount by ins. status						*
- flex mode						*

Spec sheet

	Super Lite	Lite	Base	Advance	Pro	XPro
Employee						
Manage employees	*	*	*	*	*	*
Utility for wage calculation	*	*	*	*	*	*
Manage dependant			*	*	*	*
Manage beneficiaries			*	*	*	*
Manage spouse			*	*	*	*
History of changes			*	*	*	*
Notes on employees				*	*	*
Manage employee's banking information						*
Employees list Editor			*	*	*	*
- import from XLS files			*	*	*	*
- import from Allegroupe			*	*	*	*
- export PDF			*	*	*	*
- export XLS			*	*	*	*
- export to Allegroupe			*	*	*	*
- Manage the visible columns			*	*	*	*
Benefits Management	*	*	*	*	*	*
Benefits Management	**8**	**8**	**33**	**33**	**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			*	*	*	*
Advisor notes				*	*	*
Commission management					*	*
Default values premium and commissions						*
Premiums and commissions evaluation						*
Manage plan templates						*
History						
Rates history management	*	*	*	*	*	*
Rates history - export to Excel						*
Rates history - import from Excel						*
Claim history management	*	*	*	*	*	*
Claims history - export to Excel						*
Claims history - import from Excel						*

Spec sheet

	Super Lite	Lite	Base	Advance	Pro	XPro
Advisor						
Advisor accounting						*
Manage advisors						*
Manage and edit distribution centers						*
Analysis						
Demographic Analysis				*	*	*
Demographic Analysis - Automatic Calculation from employee list					*	*
Demographic Analysis - Actuarial tools						*
Renewal Analysis				*	*	*
Management				*	*	*
Printing				*	*	*
Import claim history data					*	*
Expenses Drill Down Information						*
Manage technical results						*
Historical payout report						*

Spec sheet

ADMINISTRATION

CRM (Client Relation Manager)

	Super Lite	Lite	Base	Advance	Pro	XPro
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			*	*	*	*
Manage the basic commissions without invoicing				*	*	*
Rate import from benefits into history of Rate			*	*	*	*
Activate contract basic fees management			*	*	*	*
Management multi contract				*	*	*
Manage business rules on employee changes						*
Manage the contracts in flex mode						*
Accounting 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			*	*	*	*
Follow-up of proof of health				*	*	*
Manage employees disabilities				*	*	*
Access request for change module				*	*	*
Administration of requests for change				*	*	*

Spec sheet

	Super Lite	Lite	Base	Advance	Pro	XPro
Report generator of employees information					*	*
Manage employees accounting						*
Contract printing in individual invoicing mode						*
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			*	*	*	*
- Billing report variable period				*	*	*
Manage accounting/invoice						*
Manage accounting events						*
Manage PAP						*
Manage group accounts						*
Parameters of events			*	*	*	*
Administration fees paid by employer/yees				*	*	*
Employer's contribution maintenance					*	*
TPA Management						*
Manage TPA contract						*
Manage contract commissions						*
Payroll deductions						
Manage employer/employee contribution			*	*	*	*
Printing :						
- of contribution			*	*	*	*
- of cumulative report			*	*	*	*
- of differences since previous report			*	*	*	*
- by division				*	*	*
ASCII conversion for payroll system				*	*	*

Spec sheet

	Super Lite	Lite	Base	Advance	Pro	XPro
Others						
XML export	*	*	*	*	*	*
Data Export to payroll system			*	*	*	*
Label printing of employees				*	*	*
Electronic transfer of changes with carrier			*	*	*	*
Renewal management			*	*	*	*
Internet security for WEB module			*	*	*	*
Kronos WEB			**sur demande / on demand**			
Health spending account management			**optionnel / optional**			
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			*	*	*	*
Multiple Bank account					*	*
Bank conciliation						*

Spec sheet

SALES

	Super Lite	Lite	Base	Advance	Pro	XPro
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			*	*	*	*
Create multiple option				*	*	*
Synchronize project data				*	*	*
Manage social costs						*
Conversion into active contract	*	*	*	*	*	*
Project analysis						
Manage analysis	*	*	*	*	*	*
Access analysis configurations	*	*	*	*	*	*
Select up to 4 analysis pre-defined configuration	*	*	*	*	*	*
Manage and create analysis configurations					*	*
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)	*	*	*	*	*	*

Spec sheet

	Super Lite	Lite	Base	Advance	Pro	XPro
Pay period report (employer/employee)		*	*	*	*	*
Note on project analysis				*	*	*
Summary report by employee				*	*	*
Highlight of the differences on analysis report				*	*	*
Monthly comparative report				*	*	*
By pay period comparative report				*	*	*
Project summary report					*	*
Detailed fiscal expenses report						*
Fiscal impact comparative report						*