



## GETTING STARTED WITH GROUP BENEFITS MANAGER

### 1. LOGIN

**VISIT -- [HTTP://WWW.GROUPBENEFITSMANAGER.COM](http://www.GROUPBENEFITSMANAGER.COM)**

Click on the Group Benefits Manager login button located on the left hand side of the website. Enter your username and password. Check the "Keep me logged in" box if you wish to work online for longer than fifteen minutes. As a security feature, when the box is left unchecked you may be required to log back in following a period of inactivity.

The screenshot shows a login window with a blue header containing an information icon and the word "LOGIN". Below the header, there is a message: "Please enter your user name and password below. For security reasons, you may need to login again after a brief period of inactivity." There are two input fields: "User Name:" and "Password:". Below the password field is a checkbox labeled "Keep me logged in today". A blue "Login" button is located at the bottom right of the form.

### 2. NAVIGATING THE SITE

Use the tabs at the top of the page to move between your group information "Employer", your employee records, your benefits, and your reports. The links listed below are tools you can use while you are working under a specific tab. To return to your main overview page simply click on the Employer tab at the top of the screen.



#### Employer Tab Features

- Contact Manager
- Add Additional HR users
- Search notes

#### Employee Tab Features

- Add Employees
- Group Edit
- Employee Search

### 3. REVIEW YOUR BENEFITS

Click on the Benefits tab at the top of the screen to review your company's active benefits. Click on each plan to review the specific details, print forms, or to view / print plan descriptions.

ACTIVE BENEFIT PLANS					
Medical Plans	Type	Enrolled	Renewal	Start	End
<a href="#">Blue Cross Blue Shield of North Carolina - Plan 15 (45678)</a>	Custom	0	3/1/2007	3/1/2007	
<a href="#">Blue Cross Blue Shield of Texas - PPO 1500</a>	Custom	1	3/1/2007		
<a href="#">Blue Cross Blue Shield of Texas - PPO 500</a>	Custom	0	4/1/2006		
<a href="#">Blue Cross of California - \$30 Copay</a>	Standard	5	3/6/2007		
<a href="#">Blue Cross of California - \$40 Copay</a>	Standard	0	3/1/2007	3/14/2007	
<a href="#">Blue Cross of California - Basic PPO</a>	Standard	0	3/1/2007		
<a href="#">Blue Cross of California - Classic HMO</a>	Standard	10	12/1/2006		
<a href="#">Blue Cross of California - PPO 2500 (123456)</a>	Custom	0	2/1/2007	1/1/2001	
<a href="#">Blue Shield of California - Shield Spectrum PPO(SM) Plan 1500 Value</a>	Standard	0	4/1/2006		
<a href="#">Great-West - plan 300</a>	Custom	0	3/1/2007	3/1/2007	
<a href="#">HealthNet - \$15 Plan</a>	Custom	1	9/1/2006		
<a href="#">Kaiser Permanente - \$10/\$1,000 PLAN(expired)</a>	Standard	2	10/1/2006		
<a href="#">Kaiser Permanente - \$15 PLAN</a>	Standard	34	7/1/2006		
<a href="#">PacifiCare - HMO 15 (177924)</a>	Custom	14	9/1/2006	9/1/2005	
Dental Plans					
<a href="#">Ameritas Group - Dental HMO</a>	Custom	16	7/1/2006		
<a href="#">Delta Dental - HMO 1000</a>	Custom	0	11/1/2006		
<a href="#">Premier Access Dental - PPO Plan 18/124 (2182)</a>	Custom	16	5/1/2006	5/1/2003	
<a href="#">Safeguard - dental</a>	Custom	0	3/1/2007	3/1/2007	
Vision Plans					
<a href="#">PacAdvantage - Vision 80/20</a>	Custom	27	5/1/2006		

 **SCHEDULE OF BENEFITS**

[Blue Cross - Classic HMO Plan May06.pdf](#)

 **SMART FORMS**

[Enrollment 2-50](#)  
[Domestic Partner Affidavit](#)  
[Small Group Change Request](#)  
[Enrollment - HSA Bank](#)  
[Beneficiary - HSA Bank](#)  
[Sterling HSA Enrollment](#)  
[Enrollment](#)

## 4. UPDATE EMPLOYEE INFORMATION

Click on the Employee tab at the top of the screen to review your current employee roster. Here you can add new employees, terminate employees, and set employees to inactive. You can also track all of your HR related employee information such as salary, paid time off, disciplinary notes, hire dates, and track licenses and certifications.

<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> PERSONAL INFO</span> <span>EDIT </span> </div> <div style="display: flex; align-items: center;"> <div> <p><b>SSN:</b> 987-78-9876    <b>Title:</b> Mrs.</p> <p><b>Birth Date:</b> 11/11/1975    <b>Age:</b> 31</p> <p><b>Married:</b> Married    <b>Gender:</b> Female</p> <p><b>Height:</b> 5'8"    <b>Weight:</b> 125</p> </div> </div> </div>	<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> ADMINISTRATION</span> </div> <ul style="list-style-type: none"> <li>→ <a href="#">Terminate this employee</a></li> <li>→ <a href="#">Set this employee to InActive</a></li> <li>→ <a href="#">Remove employee from system</a></li> <li>→ <a href="#">Change mailing address to same as home address</a></li> <li>→ <a href="#">Change all dependents to same home address</a></li> </ul> </div>												
<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> EMPLOYMENT INFO</span> <span>EDIT </span> </div> <div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <p><b>Status:</b> Active    <b>Manager:</b> Paul Bever</p> <p><b>Job Title:</b> Manager    <b>Full Time:</b> True</p> <p><b>Division:</b> Orange County    <b>Benefit Group:</b> Owners</p> <p><b>Hire Date:</b> 7/2/2001    <b>Department:</b> Sales</p> <p><b>ReHire Date:</b> 3/15/2007</p> <p><b>Employee Taxes:</b> \$513    <b>Payroll ID:</b></p> <p><b>Days Off:</b> 7 vacation, 5 sick, 2 personal</p> <p><b>Salary:</b> \$18.00 Hourly</p> </div> </div> </div>	<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> DEPENDENTS</span> <span>ADD </span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;"><b>Spouse</b></td> <td style="padding: 2px;"><a href="#">Joe Adams</a></td> <td style="padding: 2px; text-align: right;"><a href="#">remove</a></td> </tr> <tr> <td style="padding: 2px;"><b>Child</b></td> <td style="padding: 2px;"><a href="#">Joseph Adams</a></td> <td style="padding: 2px; text-align: right;"><a href="#">remove</a></td> </tr> <tr> <td style="padding: 2px;"><b>Child</b></td> <td style="padding: 2px;"><a href="#">Susan Adams</a></td> <td style="padding: 2px; text-align: right;"><a href="#">remove</a></td> </tr> <tr> <td style="padding: 2px;"><b>Child</b></td> <td style="padding: 2px;"><a href="#">Nathan Adams</a></td> <td style="padding: 2px; text-align: right;"><a href="#">remove</a></td> </tr> </table> </div>	<b>Spouse</b>	<a href="#">Joe Adams</a>	<a href="#">remove</a>	<b>Child</b>	<a href="#">Joseph Adams</a>	<a href="#">remove</a>	<b>Child</b>	<a href="#">Susan Adams</a>	<a href="#">remove</a>	<b>Child</b>	<a href="#">Nathan Adams</a>	<a href="#">remove</a>
<b>Spouse</b>	<a href="#">Joe Adams</a>	<a href="#">remove</a>											
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<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> ADDRESS</span> </div> <div style="display: flex; align-items: flex-start;"> <div style="width: 100px; border-right: 1px solid #ccc; padding-right: 5px;"> Home ▼ </div> <div style="padding-left: 5px;"> <p>996 Auroch Drive #13 <a href="#">edit</a></p> <p>El Dorado Hills, CA 95762</p> <p><b>Home:</b> (916) 552-2323    <b>Work:</b> (800) 551-1234</p> <p><b>Mobile:</b>    <b>Fax:</b></p> </div> </div> </div>	<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> SELF SERVICE</span> <span>EDIT </span> </div> <p><b>Email login:</b> <a href="mailto:employee@qrevstone.com">employee@qrevstone.com</a></p> <p><b>Last Login:</b> 11/9/2006</p> <p>→ <a href="#">Enable User Login</a></p> </div>												
	<div style="border: 1px solid #004a87; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span> EMER. CONTACT</span> <span>EDIT </span> </div> <p>Susie Johnson 123 Dirt Rd. Compton, CA 90224 (213) 555-1234</p> </div>												

## 5. ADD YOUR COMPANY HANDBOOK, NEW HIRE PACKETS

Group Benefits Manager makes it easy to electronically provide information to your employees. Add your employee handbook, paid holiday schedule, or the roster for the company volleyball team. The options are endless, so simply click browse under ESS shared files at the employer level and locate any document on your computer. Once added to the system, the documents will be viewable for all of your employees.



Many groups use the system as new hire tool. Simply create a login to GBM for your new employee (see detailed instructions in step 6) using their company / personal email address. On their first day have them login to GBM and fill in all of their personal information (a wizard will require them to fill out their information before proceeding) then they can print their new hire forms (uploaded to their ESS Shared Files) and review the benefits available to them. This will help stream line the new hire process and have the employee populate your HR database.

## 6. GIVE YOUR EMPLOYEES ACCESS

By giving your employees access to GBM they will be able to view their benefits, locate a doctor, print benefit descriptions, access the carrier website and view their payroll deductions. They also have access to any files you place in the ESS shared files folder.

To grant your employees access, click on the employee record and add their email address in the box titled "Self Service". Click the edit button on the right hand corner of the box and add the email address, then click save. Once the page refreshes click email password and this will send an email to the employee giving them a username and password as well as the link to access their site. If they lose their password, in the same box click email password to employee. You can remind all employees of their usernames and passwords by clicking resend logins to all employees in the administration box on the employer overview page.



## 7. POWERFUL REPORTS

Click on the reports tab to access powerful reports. All of the report listed export to MS Excel, MS Word, or Adobe PDF. If you want to alter any of the reports or simply add columns, export the document to excel or word to make modifications. Use these reports to update your payroll providers, reconcile your carrier bills, and to track employee birthdays.

REPORT LIST		
Title	Access	Description
Employee Census	Employer	Census information for selected benefit plan type.
Employee Census with Salary	Employer	Census information for selected benefit plan type including salary and SSN.
Employee Master Census	Employer	Census information for all benefit plan types.
Employee Plan Usage	Employer	List of employees and their enrollment for the selected benefit plan type.
Employee Payroll Deductions	Employer	List of employees and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Carrier	Employer	List of employees, grouped by carrier, and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Benefit Group	Employer	List of employees, grouped by benefit group, and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Division	Employer	List of employees, grouped by division, and their payroll deductions for the selected benefit plan type.
Employee Payroll Deductions by Department	Employer	List of employees, grouped by department, and their payroll deductions for the selected benefit plan type.
Employee Billing	Employer	Billing information for all benefit plan types.
Employees In Waiting Period	Employer	Employees currently within their benefit group's waiting period.
Employee Address	Employer	Employee list with address, phone, email
Employee Benefit Summary	Employer	Employee detail information, single page per employee.
Employee Birthday List	Employer	Employee list with Birthday