



# Benefits Manager Pro

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## Capability highlights of Benefits Manager Pro

### Easily Create Enrollment Sites

- Create and customize step by step enrollment site(s) with no group size restrictions
- Support self and assisted enrollment
- Support Affinity and Employer groups
- Highly customizable benefits, pages, content, and enrollment rules
- Mix and match carrier products
- Each enrollment site is completely independent and customized for the needs of the group
- Live chat and co-browsing integration.

### Multi-Account and Benefit Administration

- Support hierarchical broker accounts with a common administration portal
- View reports and activity of all downstream accounts
- Create enrollment sites, and manage benefits for multiple cases per account
- Assign multiple administrators and agents with defined access roles and privileges
- Positively track enrollment, benefit and payment histories of each participant
- Optionally require administrative approval for select benefits

### Product Library

- Include carrier provided products from central product library
- Customize products from the library to meet case specific requirements
- Powerful product engines support complex carrier rules for voluntary and core benefits
- Restrict products based on state, group, department, class and other characteristics

### Imports, Exports, and Reports

- Upload and update a case census for groups large and small
- Migrate cases by importing existing benefits and dependents
- Variety of reports, exports, and search capabilities support benefits management
- Import and assign unique carrier provided IDs to benefits as they are enrolled.

### Self pay support

- Accept Credit Cards or ACH for self payment
- Automatic update of expired or replaced credit cards cards
- Support payment distribution of funds to providers, producers, and other entities per case rules.

### Support and Training

- Platform support, and training provided to producers and providers.
- Development services for product and site available as required.