Amwins View
Employee Online
Users Guide

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AMWINS™

CONNECT ADMINISTRATORS

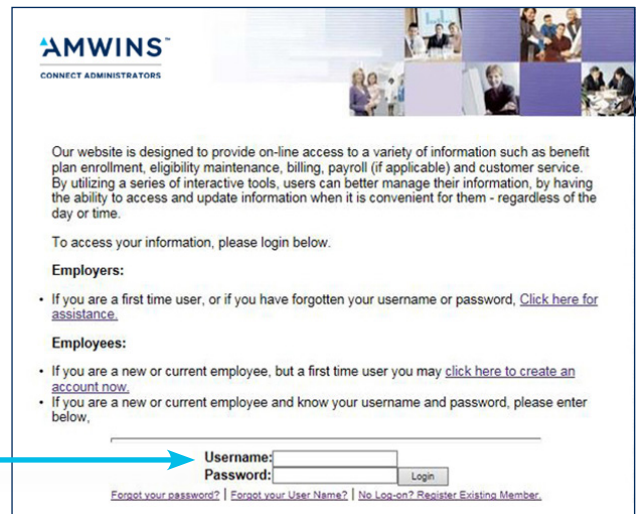# Table of Contents

1. Introduction

A. Accessing the Online Enrollment Website

We are pleased to provide our Online Enrollment Website which allows you to review benefit options, compare benefit summaries and complete final benefit elections. To access and utilize our Online Enrollment website please visit our website at **https://secure.amwinsconnecttpa.com/ AmwinsLogin/Signin.aspx**

All first time Users can create their secured access by clicking on **No Log-on? Register Existing Member** on the Welcome Screen. You will then be asked to authenticate yourself by completing the information requested including your Username and Password.

As a returning user, you can simply enter your Username and Password on the Welcome Screen to gain access.

Please login to access the Online Enrollment Employee Benefit Portal.

B. Employee Benefit Portal

Our online enrollment system is designed to give employees an opportunity to review and update their personal information and perform benefit elections with ease and convenience, any time day or night.

This screen provides an overview of the features of the system. To review any of these functions, click on the options provided on the portal. Each option will provide further instructions to review information or to complete benefit elections.

2. Features

A. Message Center

The Message Center displays the following types of messages:

- New Hire message—
  - Provides the date range for enrollment and a countdown of number of days to complete
- Open Enrollment message—
  - Provides the date range for enrollment
  - Employers may publish a specific message for Open Enrollment instructions
- Alert Messages—
  - Dependents without coverage
  - Missing beneficiaries
 - Missing PCP information
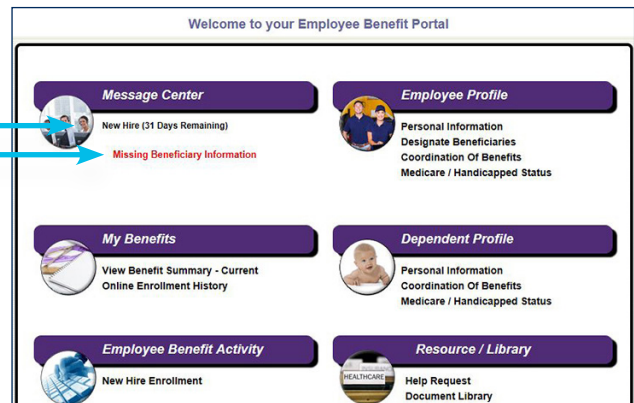
B. Resource/Library

The Resource / Library provides employees access to Carrier Benefit Summaries as well as carrier and Amwins Connect Administrators forms. An employee can also request assistance from their dedicated Amwins Connect Administrators Customer Service Representative.

Help Request
- Select Help Request
- If applicable, add the requested demographic information
- Select assistance regarding Benefits or a Technical Question
- Type your question in the box provided
- Then Click to Submit
- You will receive a confirmation email with an assigned ticket number and a response within two business days
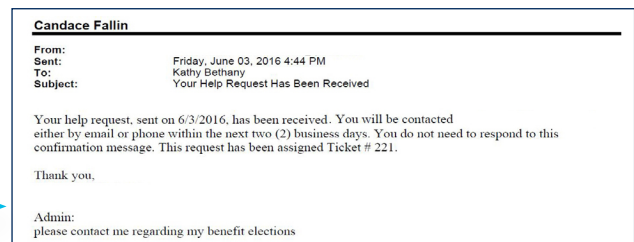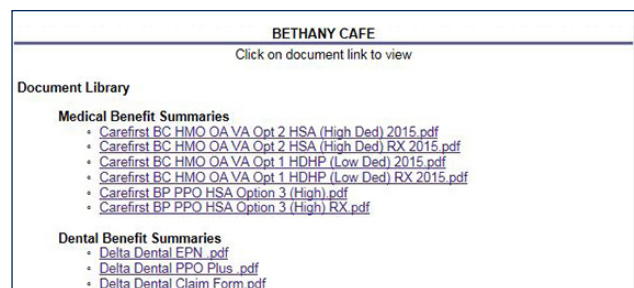
Document Library
Employers may provide detailed information regarding employer sponsored benefits, carrier information and forms for employees to complete HR or benefit documentation.
- Click on the document link to view the specific document

C. Employee Profile

Employee Profile offers employees the ability to enter or update demographic, employment and beneficiary information. In addition they may update Primary Care Provider selection and provide Coordination of Benefits (other insurance) and Medicare or Handicapped Status changes.

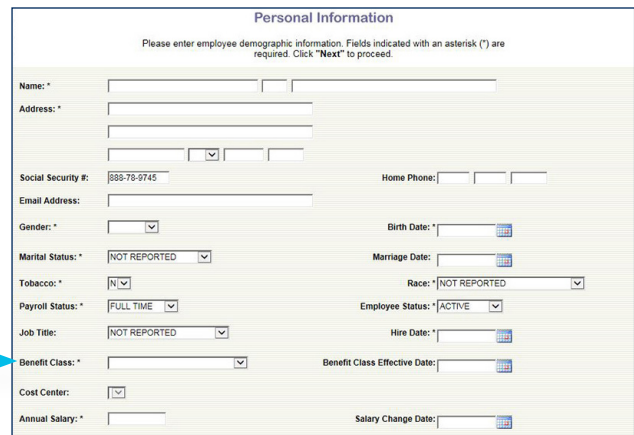**Personal Information**–Complete the Personal Information page.
- Benefit class may differentiate benefit availability and / or payroll deductions and is completed by your employer.
- Fields with an asterisk are required.
- When complete, hit Next to finalize.
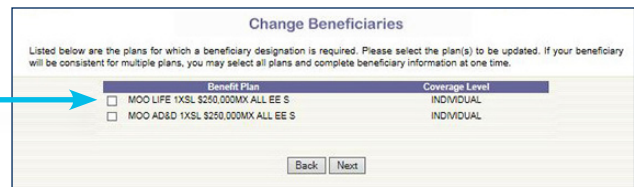
Designate Beneficiaries
- Select the plan(s) for which updated beneficiary information is required.
- Enter the primary beneficiary name, relationship, percentage of benefit and effective date.
  If contingent beneficiaries apply, please enter the same information noted above.
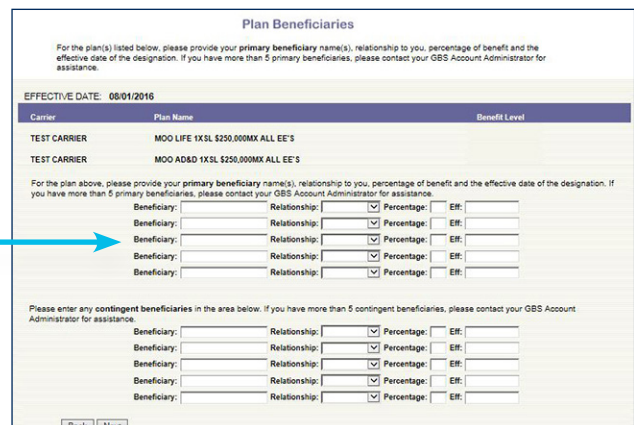- When complete, hit Next to finalize.

C. Employee Profile (continued)

Primary Care / Provider
- Based on the medical plan election, you may be required to select a Primary Care Physician.
- A link to the carrier provider directory is displayed. Please enter the selected provider ID, physician name and effective date.
- Also respond to the question regarding your status as an existing patient.
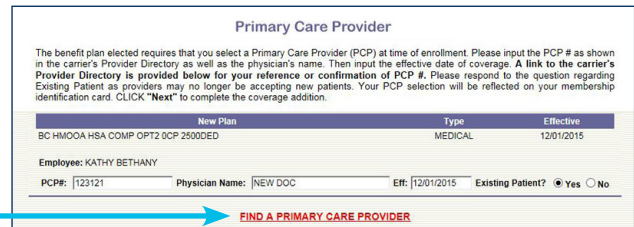- When complete, hit Next to finalize.
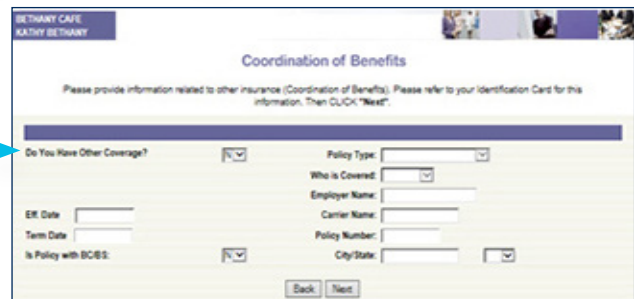
Coordination of Benefits
- If you are participating in other medical or dental insurance plans, please provide the information so that claims processing can coordinate benefits.
- Required information includes Policy Number, Carrier Name, Members Covered, Effective Date and, if group insurance, the Employer Name
- When complete, hit Next to finalize.

Medicare / Handicapped Status
- If you are participating in Medicare Part A or Part B, please complete the information required.
- Updates to Handicapped/Disabled Status may be completed on this screen as well. Please note that additional documentation to substantiate handicapped status may be required from the carrier and you will be contacted by Amwins Connect Administrators when necessary.
- When complete, hit Next to finalize.

D. Dependent Profile

Dependent Profile offers employees the ability to enter or update dependent demographic information. In addition they may update dependent Primary Care Provider selection and provide Coordination of Benefits (other insurance) and Medicare or Handicapped Status changes.

E. My Benefits

My Benefits is up to date information regarding your current benefits.

View Benefit Summary
- Your Benefit Summary reflects your plan elections, payroll deductions and coverage levels as of the date and time shown. If you have ancillary products, beneficiary information as provided through Online Enrollment, will be displayed.
- Plans for which elections have not been made will be displayed.
- Plans that have been declined will be listed.
- You may print a summary for your records or review prior to making benefit changes.
- You may have both Current and Open Enrollment Benefit Summaries for review.

Online Enrollment History
- A history of transactions performed through Online Enrollment is maintained.
- You may view the detail of each transaction in the list by selecting the Action button. Transactions are displayed by date and transaction type.
- You may print an Employee Election Form which reflects the transaction performed by selecting the print button under Action.

F. Employee Benefit Activity

Employee Benefit Activity provides the employee the ability to perform various enrollment transactions during the following periods; New Hire, Open Enrollment or Mid-Year Life Events.

– Select the Benefit Activity.
– Employees must review the Electronic Signature Policy. Following the acceptance of the terms and conditions surrounding electronic signature, the employee may proceed to elect benefits.

New Hire and Open Enrollment–Performing Benefit Elections–Medical, Dental and Vision

– All benefit options available to the employee will be shown on the left margin and the election process then progresses through each benefit election screen Step by Step.
– All Company Paid benefit plans are automatically elected and appear with a GREEN check mark in the left margin.
– Complete enrollment as follows:
  1. Add dependents to be enrolled in each benefit plan.
  2. Review list of plan options.
  3. Click on up to three plan options to compare benefits.
  4. Review the Side by Side Comparison.
  5. Click on the Benefit Description above any plan option to display a detailed Summary of Benefits.

F. Employee Benefit Activity (continued)

New Hire and Open Enrollment (continued)
Performing Benefit Elections–Medical,
Dental and Vision

6. Employer cost and employee payroll deductions for each plan option (based on coverage level / dependents included in the plan) are displayed on the benefit election screen as well as the benefit comparison.

7. Select a plan option and click Search for a Provider to confirm physician participation in the selected plan option.
8. Elect the plan option for this coverage type OR Decline.
9. Hit Next.

Note: As you proceed to the next benefit option, you will note that your decision regarding the election or decline of the prior plan is noted in the left margin. Listed dependents will carry over to each plan option to allow for coverage election.

F. Employee Benefit Activity (continued)

Reviewing Benefit Elections–Company Paid Group Life, AD&D, STD and LTD

− Details regarding the benefit level will be displayed.
− Proceed to the next screen to enter beneficiary information.
− Then click NEXT to finalize.

Performing Benefit Elections–
Voluntary Employee and Dependent Life, AD&D and Employee STD and LTD.

When a single plan option / coverage level is available, complete enrollment as follows:

1. Review the coverage level and cost associated with your plan option
2. Select Elect or Decline
3. Proceed to the next screen and enter the beneficiary information

When a range of coverage is available, complete enrollment as follows:

1. Review the plan screen to determine the benefit levels available for election. Information is provided regarding minimum and maximum coverage as well as Guaranteed Issue amounts.
2. Elect the plan option for this coverage type OR Decline.
3. Enter the benefit amount you wish to purchase, hit Calculate Cost, and review the monthly employee cost. Amounts elected over Guaranteed Issue will require Evidence of Insurability and are subject to carrier approval.
4. Employees will receive a message that amounts above Guaranteed Issue will require EOI and they are asked to contact their HR department for assistance in applying for additional coverage.

F. Employee Benefit Activity (continued)

Performing Benefit Elections (continued)–
Voluntary Employee and Dependent Life,
AD&D and Employee STD and LTD

5. Employers will receive an email alerting them that the employee has attempted to enroll for an amount requiring EOI.
6. Enrollment will be completed for the amount up to Guaranteed Issue.
7. You may make changes or hit Next to finalize.
8. Proceed to the next screen and enter the beneficiary information. Please bear in mind that Spousal or Dependent coverage may warrant a change in the carried over beneficiary information.

Performing Benefit Elections–FSA Medical, Dependent Care, Premium Reimbursement and Parking/Transit

Complete enrollment as follows:

1. Review the plan screen to determine the maximum plan year contribution.
2. Elect the plan option for this coverage type OR Decline.
3. Enter either the per pay contribution amount in the Yearly Contribution Calculator or enter the Total Contribution Amount for the Plan Year to calculate the per pay deduction. You can view the deductions calendar by clicking on the highlighted deduction count.
4. Hit "Select this calculation" in the calculator where an election amount has been entered
5. Calculated amounts Per Pay and per plan year will display.
6. If amounts shown are acceptable, hit Next to finalize.

Mid-Year Life Event Benefit Election
– Enter the Mid-Year Life Event date.
– Select the type of Mid-Year Life Event & hit Continue
– You will see a listing of plans (highlighted) as eligible for change based on the type of Mid-Year Life Event.
– Hit Continue.

Performing Benefit Elections
– Proceed with the enrollment changes to any eligible plan, by following the step by step process for the benefit types (Medical, Life, FSA etc.) as outlined under New Hire and Open Enrollment.