



Announcing digital benefits management for our clients

Cutting-edge tools to make managing benefits a better experience for you and your plan members.



Our clients save time and money when they switch to digital

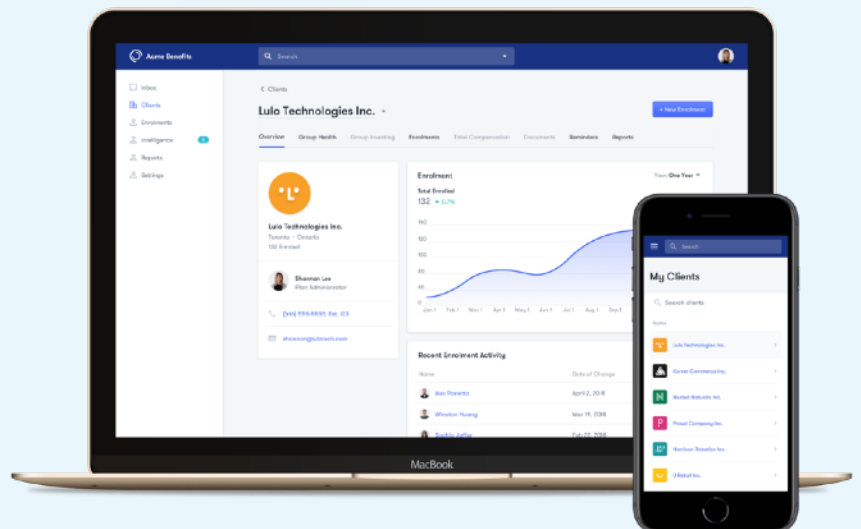
25% — of SMB clients experience enrolment errors each year using traditional enrolment

15% — average error rate in employee enrolment data when using traditional enrolment

Switching to digital enrolment saves you from the frustrating process of dealing with paper forms. But importantly, going digital will also help you save money by eliminating common errors that cost both plan administrators and plan members time and money.

Why switch to online management?

- ▶ One enrolment experience for all of your benefits providers
- ▶ No more paper forms and double-entry
- ▶ No more costly enrolment errors
- ▶ Employee self-serve logins
- ▶ Eligibility, probation and late enrolment reminders
- ▶ One-click benefits reporting



How digital enrolment works:

- 1 Log into your benefits portal and enter in some basic info about your new hire(s).
- 2 When you click 'send', your new employees will receive a link via email to complete their benefits plan enrolment online.
- 3 When employees submit their enrolment information, our platform will sync their data to all of your insurance providers – meaning your work is done!

If your new hire needs some more time (or forgets) to complete their enrolment, the platform will automatically follow up with them to ensure everything gets done correctly and on time.

Enrolment Details

Your Spouse's Date of Birth

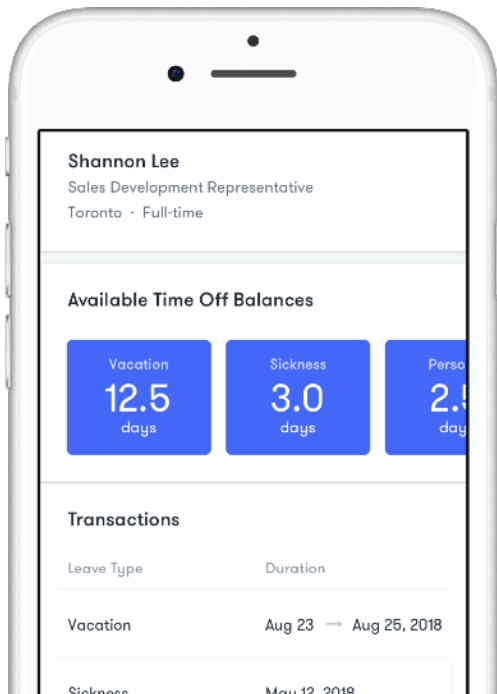
What is the name of your spouse's insurer?

Does your spouse have any health or dental coverage under their employer's benefits plan?

Yes No

What type of coverage does your spouse have?

- Vision Care
- Dental Care
- Extended Health Care



Plus, easily upgrade your account to include all-in-one HR and payroll management functionality

Would it make your life easier if your benefits were fully synced with HR and payroll? We can help with that too.

You can easily upgrade your online benefits portal to Collage HR – a comprehensive HR system that can achieve full integration with your payroll platform and benefits providers.

We have a privileged relationship with Collage and would be happy to set you up with a platform demonstration.

Join the future.
Talk to your advisor today