

Online Enrolment Checklist for Plan Administrators



STEP

1

YOUR ROLE AS PLAN ADMINISTRATOR

1. Now that you've logged in with your username and password, you're ready to enrol your employees.

2. You have **two options** for enrolling your employees using Online Enrolment:

OPTION 1: QUICK ADD EMPLOYEE (A good choice if only enrolling a few employees)

- Add employee name and email
- Add employer information individually by choosing, "**VIEW & UPDATE**" for each employee you are enrolling.

OPTION 2: IMPORT EMPLOYEE LIST (Best option for enrolling many employees at once)

- Click on the i-symbol and then "**DOWNLOAD TEMPLATE**" to access the spreadsheet.
- Add all of the required employee data to the spreadsheet and save the file once you are done.
- Next, click on "**IMPORT EMPLOYEE LIST**" and then "**UPLOAD**" to save your spreadsheet so that all employee information is loaded to your online enrolment dashboard.

3. Once you have added all employees using either option above, you will need to send them an enrolment link. You can send it to individual employees or to all employees at once by checking off the box to the left of their name and clicking on "**Send enrolment link**" at the bottom of the page. This sends an email invitation to your employees so that they can complete the Employee Sections 1 and 3 of the enrolment as required.

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STEP

2

YOUR EMPLOYEES HAVE A KEY ROLE TO PLAY

1. Employees will receive an email with the subject line, “**Your my-benefits online enrolment**” from no_reply@chambers.ca. To sign up for *my-benefits*, they must click on the link to set up their user ID and password.

2. Once your employee has set up their User ID and password, they must log into *my-benefits* to complete sections 1 and 3 of their application.

IMPORTANT! They need to save their user ID and password so that they can complete the final steps on page 3. **NOTE:** Employees will use this user ID and password to access all of their plan information once their coverage is in effect.

Q. HOW CAN YOU HELP TO ENSURE YOUR GROUP BENEFITS ARE ISSUED AS QUICKLY AS POSSIBLE?

A. Log into *my-benefits* daily to check the status of employee applications and follow up with your employees as needed.

Q. WHAT IF AN EMPLOYEE IS NOT COMPLETING THE EMPLOYEE SECTION OR IS HAVING ISSUES?

A. YOU MAY COMPLETE IT ON THEIR BEHALF by clicking on “view and update” and completing any outstanding information in sections 1 or 3.

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STEP

3

FINAL STEP – BACK TO YOU!

1. Once both the employee and plan administrator sections of the enrolment show as complete on the dashboard, you will need to click on “review and submit”. If all information is correct, click on “submit”.

YOU'RE DONE! WHAT TO EXPECT:

2. Next, the employee application is sent to our office for processing. The pending completed applications can now be viewed from the Change Request history tab in *my-benefits*.

3. Lastly, we will review all the applications and issue your benefits plan. A welcome letter will be emailed to you and your Chambers Plan advisor, confirming that your coverage has been placed into effect. Your advisor will then contact you to arrange a time to walk you through all of the plan's many features.



We're here to help every step of the way.
chambers@johnstongroup.ca | 1 800-665-3365
Mon-Fri: 7:30am to 4:30pm (Central Time Zone)

GET TO KNOW THE ONLINE ENROLMENT DASHBOARD.

WHAT DO THESE SYMBOLS MEAN?



NOT REGISTERED
Employee has not set up
User ID and password.

REGISTERED

Employee has created
a *my-benefits* account, but not
logged in to *my-benefits*.



NOT STARTED
Plan Administrator or the
employee have not started.



IN PROGRESS
Plan Administrator or the
employee have started, but not
completed, the section.

EXPIRED

The employee has not
registered within 7 days.
You must resend this
employee their
enrolment link.



COMPLETE

The employee and/or employer sections
have been completed and are ready to
be submitted to our office.

SUBMITTED

Success! To see to submitted
applications, go to the Enrolment Form
column and click “Included Submitted”.