

Client Enrollment System Overview





A few of the systems key features includes:

- Developed in-house, specifically for our clients needs
- Ability to back-date coverage up to 2 weeks
- Add, edit and cancel enrollments
- Bulk uploads via excel, or direct input from your system via API
- Email, download and print ID cards and visa letters
- Full search capabilities, including labeling groups of participants
- Comprehensive history tracking for each participant

Login Page

An Envisage International Website | Contact


Login

LOGIN




Username

Password

Remember me next time

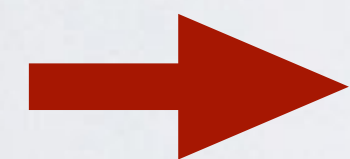
 **International Student Insurance**
224 First Street
Neptune Beach, FL 32266 USA
[Contact](#)

[Agents / Affiliates](#)
[Student Zone>](#)
[About](#)
[Sitemap](#)

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Access to the tool is available through our login page (link below). You will be provided with your own unique login to the tool, so please do not share login accounts.



<http://www.internationalstudentinsurance.com/group/admin/login>

Dashboard

The dashboard features a top navigation bar with 'Admin Home', 'Your Plans', 'Messages', and 'Logout'. Below this is the 'International Student Network Dashboard' with a message: 'There are currently no participant renewals pending.' The main content area is divided into three sections: 'CURRENT TRAVEL DAYS' (126,672 total), 'TOTAL PARTICIPANTS' (1,440 total), and 'PARTICIPANTS NEEDING REVIEW'. The 'CURRENT TRAVEL DAYS' section shows a bar chart with 98.3% USED (124,514), 1.7% UPCOMING (2,158), and 0% RENEWAL (0). The 'TOTAL PARTICIPANTS' section shows a bar chart with 98.89% EXPIRED (1,424), 1.11% ACTIVE (16), and 0% INACTIVE (0). The 'PARTICIPANTS NEEDING REVIEW' section is empty. Below these is a 'SEARCH PARTICIPANTS' form with fields for First Name, Last Name, Date of Birth, Labels, Note, Internal ID, and Extendable. A 'Search' button and a 'Clear' button are present. A note below the search form states: 'You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.' At the bottom, there are two plan cards: 'Sample Plan Basic' and 'Sample Plan Premium', each with 'upload participants', 'add participants', and 'view participants' buttons.

Once you are logged into the enrollment tool, you will arrive at the dashboard, showing you the following:

- Pending renewals (if any)
- Overall travel day summary
- Overall participants summary
- Participants under review
- Quick participant search
- Your plans

Plan View

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International Student Insurance

Admin Home Your Plans Messages Logout

Advanced Search Add Participants Upload Participants Download Participants View Upload History Help

Sample Plan Premium - Plan View

CURRENT TRAVEL DAYS: 6,303

TOTAL PARTICIPANTS: 46

PLAN DETAILS: ACTIVE

Plan Number: 299956
 Underwriter: Sample Underwriter
 Policy Max: \$0
 Deductible: \$25 per certificate period
 Total Participants: 46
 ER Fee: \$250
 Price Per Day: \$0.00
 Average Span: 137 days
 Minimum Age: 14D
 Maximum Age: 69Y

Go to Student Zone

Displaying 1-5 of 52 results.

First Name	Last Name	Date of Birth	Start Date	End Date	Age	Extends To	Travel Days	Created	Updated	Status	Actions
<input type="checkbox"/>	Theodore	Roosevelt	1989-10-28	2015-10-14	2016-07-14	25	275	2015-10-28	2015-10-28	Active	
<input type="checkbox"/>	William	Taft	1969-12-12	2015-10-14	2016-07-14	45	275	2015-10-28	2015-10-28	Active	
<input type="checkbox"/>	James	Brown	1997-05-21	2015-06-01	2016-05-31	18	366	2015-05-21	2015-05-21	Active	
	CINTIA	GABRIEL	1969-12-31	2014-05-02	2014-05-02	44	0	2014-04-25	2014-11-06	Cancelled	
	MARIA	ALMEIDA	1969-12-31	2014-05-02	2014-05-22	44	21	2014-04-25	2014-10-24	Expired	

1 2 3 4 5 6 7 8 9 10 Next > Last >>

Clicking on the plan name from the main dashboard, will take you to the plan view where you can see all the details about that particular plan including:

- Action buttons for:
 - Advanced search
 - Add Participants
 - Upload Participants
 - Download Participants
 - View Upload History
 - Help
- Plan Summary Information
- Participant List with filtering options

Participant List

Quick search and filter participants

Option to select multiple records at one time, and then perform bulk actions on more than one record

Displaying 1-10 of 52 results.

<input type="checkbox"/>	First Name	Last Name	Date of Birth	Start Date	End Date	Age	Extends To	Travel Days	Created	Updated	Status	Rows: 10
<input type="checkbox"/>	Theodore	Roosevelt	1989-10-28	2015-10-14	2016-07-14	25		275	2015-10-28	2015-10-28	Active	
<input type="checkbox"/>	William	Taft	1969-12-12	2015-10-14	2016-07-14	45		275	2015-10-28	2015-10-28	Active	
<input type="checkbox"/>	James	Brown	1997-05-21	2015-06-01	2016-05-31	18		366	2015-05-21	2015-05-21	Active	
	CINTIA	GABRIEL	1969-12-31	2014-05-02	2014-05-02	44		0	2014-04-25	2014-11-06	Cancelled	
	MARIA	ALMEIDA	1969-12-31	2014-05-02	2014-05-22	44		21	2014-04-25	2014-10-24	Expired	
	LARISSA	PORTO	1969-12-31	2014-05-03	2014-05-17	44		15	2014-04-25	2014-10-24	Expired	
	Joe	Schmoe	1996-04-17	2015-03-25	2015-09-01	18		161	2014-04-17	2015-04-08	Expired	
	Annemarie	Estrada	1996-01-04	2014-02-06	2014-07-22	18		167	2014-01-27	2014-10-24	Expired	
	Joao Pedro	Rossetto	1997-09-18	2014-01-04	2014-03-04	16		60	2013-12-17	2014-10-24	Expired	
	Sydney Salomao	da Nobrega Filho	1994-06-22	2014-01-15	2014-06-11	19		148	2013-12-17	2014-10-24	Expired	

1 2 3 4 5 6 Next > Last >>

With Selected Rows: Export to XLS | Cancel | Edit | Bulk Labels | Email ID cards | Download ID cards | Email Visa Letters | Download Visa Letters |

export XLS

Individual actions:

- View record
- Edit record
- Cancel record
- Access Documents
- Flagged Status

Participant View

Participant record details

Viewing James Jone - Sample Plan Premium Plan

View Plan Download PDF Email PDF Download Visa Letter Email Visa Letter **View Participant History**

THIS PARTICIPANT IS NOT YET ACTIVE.

First Name	James	Home Country Name	Germany	Start Date	2015-12-31
Middle Name		Address Line 1	1234 Place Ave	End Date	2016-01-28
Last Name	Jone	Address Line 2		Travel Days	29
Gender	M	City	New York	US Citizen	No
Date of Birth	1997-12-10	State Name	New York	US Destination	Yes
Email	jjones@mac.com	Country Name	United States	Underwriter	Sample Underwriter
CC Email		Postal Code	01223	Note	
Status	In-Active	Telephone		Labels	

Created: 2015-12-18 07:57:29
Updated: 2015-12-18 07:57:29

Update James Jone **Cancel James Jone** Back to Plan Details

Buttons to:

- Update record
- Cancel record
- Back to plan view

Buttons to:

- Back to plan view
- Download ID Card
- Email ID Card
- Download Visa Letter
- Email Visa Letter
- View full history

Note - emailing documents goes to the email address on file

Adding a Participant

Add Participants to Sample Plan Premium [Back to plan details](#)

PARTICIPANT 1

First Name *	Address Line 1 *	US Citizen * <input type="radio"/> No <input type="radio"/> Yes
Middle Name	Address Line 2	US Destination * <input type="radio"/> No <input type="radio"/> Yes
Last Name *	City *	Start Date *
Email *	Postal Code *	End Date *
CC Email	Country *	Courtesy Date
Telephone	State	The future end date to remind you this participant needs more than 364 days of coverage. You can renew 90 days prior to the expiration.
Gender * Choose:	Home Country *	
Date of Birth *	Internal ID	Labels
	Tax Id. Number	
	Note	

[Save](#) [Cancel](#) [Add Another](#)

To add an individual participant:

- Click on any of the “Add Participant” buttons either on the plan view, or dashboard view.
- Complete the form with all the participants details and hit the green “Save” button.
- A confirmation will appear on screen and you will have the option to email or download their documents.
- Multiple participants can be added at once by clicking on the “Add Another” button

Note - only the information marked with a red * is required, all other fields can be left blank.

Confirmation on screen that the participant has been added:

Your participants have been saved. [×](#)

- James Optix (1997-12-23) ID Card | Visa Letter

Bulk Uploads

Upload Participants/Changes to Sample Plan Premium View Plan Help

UPLOAD NEW PARTICIPANTS

Sample Spreadsheets:

- Sample CSV File
- Sample XLS File

Please ensure that you are uploading only NEW participants. If you need to edit existing participants, please search for them in the participant listing and edit them directly.

File to Upload Choose File No file chosen

***Important Note:** Please do not refresh your browser once you click "Upload". Large spreadsheets may take longer to process than others.

Upload Cancel

To process a bulk upload:

- Click on any of the “Upload Participants” buttons either on the plan view, or dashboard view.
- Download the sample file to view the data format.
- Once all your data is in this format, select “Choose file” and select the file with all your participant data.
- Hit the green “Upload” Button

Note - please do not hesitate to contact your account rep the first few times you do this, so we can assist you in making sure the data is in the correct format.

Bulk Uploads Confirmation

Congratulations, your upload has been successful!

Please review the entries below to make sure they are accurate before hitting the save button at the bottom of the page to confirm these entries to your plan. If there are any problems with the uploads, the problem entries will be highlighted in red. Please adjust the highlighted entry so that it is correct — do this for all problem entries and then hit save at the bottom of this page.

CAUTION!!!

Please wait for the page to completely finish processing before hitting submit or leaving the page. Leaving the page while it is partially processed will result in a partially saved spreadsheet.

Items to process: 100% Complete

PARTICIPANT 1

First Name * <input type="text" value="Grace"/>	Address Line 1 * <input type="text" value="1263 Main St."/>	US Citizen * <input checked="" type="radio"/> No <input type="radio"/> Yes
Middle Name <input type="text" value="B"/>	Address Line 2 <input type="text"/>	US Destination * <input type="radio"/> No <input checked="" type="radio"/> Yes
Last Name * <input type="text" value="Frank"/>	City * <input type="text" value="Anywhere"/>	Start Date * <input type="text" value="2015-12-25"/>
Email * <input type="text" value="test@internationalstudent.com"/>	Postal Code * <input type="text" value="12557"/>	End Date * <input type="text" value="2016-03-01"/>
CC Email <input type="text"/>	Country * <input type="text" value="United States"/>	Courtesy Date <input type="text"/>
Telephone <input type="text" value="555-5343"/>	State <input type="text" value="Florida"/>	<small>Coverage is for 68 days. The future end date to remind you this participant needs more than 364 days of coverage. You can renew 90 days prior to the expiration.</small>
Gender * <input type="text" value="Male"/>	Home Country * <input type="text" value="Argentina"/>	Labels <input type="text"/>
Date of Birth * <input type="text" value="1992-04-24"/>	Internal ID <input type="text" value="129"/>	
<small>This participant is 23 years old.</small>	Tax Id. Number <input type="text"/>	
	Note <input type="text" value="sample notes"/>	

Save

Your form submission is now being processed! Please wait...

As each participant is processed, it will either be saved or you will be presented with the person's form a second time to correct their information. Please do not resubmit the page until the first submission has completed, or you will have incompletely saved data.

CAUTION!!!

Please wait for the page to completely finish processing before hitting submit or leaving the page. Please wait for the page to completely finish processing before hitting submit or leaving the page. Leaving the page while it is partially processed will result in a partially saved spreadsheet.

[Export XLS](#)

Items to process: 100% Complete

The following were saved successfully:

282625	Grace Frank	ID Card	Visa Letter
--------	-------------	---------	-------------

[Return to Plan](#) [Email ID Cards](#) [Email Visa Letters](#) [Email ID & Visa](#)

NOTE: You will not be able to send documents for Flagged participants.
















The bulk upload process is a 2-Step process, so once you upload you can review the uploads to confirm everything is correct.

- If you find any errors, you can directly adjust them here
- Make sure the “Items to process” is at 100%, especially if you have a large list.
- The upload can take up to 1,000 participants at one time.
- To complete and upload, click “Save”

You will then receive this confirmation on screen showing you the process is 100% complete and the ability to email or download plan documents.

Editing a Participant

Displaying 1-5 of 55 results.

<input type="checkbox"/>	First Name	Last Name	Date of Birth	Start Date	End Date	Age	Extends To	Travel Days	Created	Updated	Status	
<input type="checkbox"/>	Grace	Frank	1992-04-24	2015-12-25	2016-03-01	23		68	2015-12-18	2015-12-18	In-Active	  
<input type="checkbox"/>	James	Optix	1997-12-23	2015-12-24	2016-01-20	18		28	2015-12-18	2015-12-18	In-Active	  
<input type="checkbox"/>	James	Jone	1997-12-10	2015-12-31	2016-01-28	18		29	2015-12-18	2015-12-18	In-Active	  
<input type="checkbox"/>	Theodore	Roosevelt	1989-10-28	2015-10-14	2016-07-14	25		275	2015-10-28	2015-10-28	Active	  
<input type="checkbox"/>	William	Taft	1969-12-12	2015-10-14	2016-07-14	45		275	2015-10-28	2015-10-28	Active	  

1 2 3 4 5 6 7 8 9 10 Next > Last >>

Edits or updates to a participants details is possible through the system - simply locate the participant and either click on the “pencil” icon in the plan view, or in the participant view click on the “Update” button in the bottom left.

Update the record and click “Save”

With Select **Viewing James Jone - Sample Plan Premium Plan**

[View Plan](#) [Download PDF](#) [Email PDF](#) [Download Visa Letter](#) [Email Visa Letter](#) [View Participant History](#)

THIS PARTICIPANT IS NOT YET ACTIVE.

First Name	James	Home Country Name	Germany	Start Date	2015-12-31
Middle Name		Address Line 1	1234 Place Ave	End Date	2016-01-28
Last Name	Jone	Address Line 2		Travel Days	29
Gender	M	City	New York	US Citizen	No
Date of Birth	1997-12-10	State Name	New York	US Destination	Yes
Email	jjones@mac.com	Country Name	United States	Underwriter	Sample Underwriter
CC Email		Postal Code	01223	Note	
Status	In-Active	Telephone		Labels	



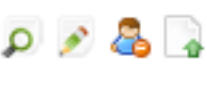
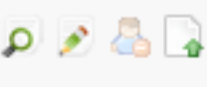

Created: 2015-12-18 07:57:29
Updated: 2015-12-18 07:57:29

[Update James Jone](#) [Cancel James Jone](#) [Back to Plan Details](#)

Note - in some cases the edit or update button might not be available, or the actual fields of the record greyed out. This is because the update could not be made, for example on an expired record.

Cancelling a Participant

Displaying 1-5 of 55 results.

<input type="checkbox"/>	First Name	Last Name	Date of Birth	Start Date	End Date	Age	Extends To	Travel Days	Created	Updated	Status	Rows: 5
<input type="checkbox"/>	Grace	Frank	1992-04-24	2015-12-25	2016-03-01	23	68	2015-12-18	2015-12-18	In-Active		
<input type="checkbox"/>	James	Optix	1997-12-23	2015-12-24	2016-01-20	18	28	2015-12-18	2015-12-18	In-Active		
<input type="checkbox"/>	James	Jone	1997-12-10	2015-12-31	2016-01-28	18	29	2015-12-18	2015-12-18	In-Active		
<input type="checkbox"/>	Theodore	Roosevelt	1989-10-28	2015-10-14	2016-07-14	25	275	2015-10-28	2015-10-28	Active		
<input type="checkbox"/>	William	Taft	1969-12-12	2015-10-14	2016-07-14	45	275	2015-10-28	2015-10-28	Active		

1 2 3 4 5 6 7 8 9 10 Next > Last >>

Cancelling a participants coverage entirely is possible through the system - simply locate the participant and either click on the “person” icon in the plan view, or in the participant view click on the “Cancel” button in the bottom left.

Confirm the cancellation, and hit submit.

With Selected Rows:

Viewing James Jone - Sample Plan Premium Plan

[View Plan](#) [Download PDF](#) [Email PDF](#) [Download Visa Letter](#) [Email Visa Letter](#) [View Participant History](#)

THIS PARTICIPANT IS NOT YET ACTIVE.

First Name	James	Home Country Name	Germany	Start Date	2015-12-31
Middle Name		Address Line 1	1234 Place Ave	End Date	2016-01-28
Last Name	Jone	Address Line 2		Travel Days	29
Gender	M	City	New York	US Citizen	No
Date of Birth	1997-12-10	State Name	New York	US Destination	Yes
Email	jjones@mac.com	Country Name	United States	Underwriter	Sample Underwriter
CC Email		Postal Code	01223	Note	
Status	In-Active	Telephone		Labels	





















[Update James Jone](#) [Cancel James Jone](#) [Back to Plan Details](#)

Created: 2015-12-18 07:57:29
Updated: 2015-12-18 07:57:29

Note - cancellations are only possible before coverage has become effective. If coverage has started, you can end coverage early simply by editing the records end date to shorten the coverage period.

Documents - Plan View

Displaying 1-5 of 55 results.

<input type="checkbox"/>	First Name	Last Name	Date of Birth	Start Date	End Date	Age	Extends To	Travel Days	Created	Updated	Status	Rows: 5
<input type="checkbox"/>	Grace	Frank	1992-04-24	2015-12-25	2016-03-01	23	68	2015-12-18	2015-12-18	In-Active	   	
<input type="checkbox"/>	James	Optix	1997-12-23	2015-12-24	2016-01-20	18	28	2015-12-18	2015-12-18	In-Active	   	
<input type="checkbox"/>	James	Jone	1997-12-10	2015-12-31	2016-01-28	18	29	2015-12-18	2015-12-18	In-Active	   	
<input type="checkbox"/>	Theodore	Roosevelt	1989-10-28	2015-10-14	2016-07-14	25	275	2015-10-28	2015-10-28	Active	   	
<input type="checkbox"/>	William	Taft	1969-12-12	2015-10-14	2016-07-14	45	275	2015-10-28	2015-10-28	Active	   	

When adding a participant into the system, you can download or email their documents as part of that process.

If you wish to access those documents again, you can do this from the plan view by clicking on the “paper” icon to bring up the documents view:

- Download or email ID Card
- Download or email Visa Letter
- Combine documents to send
- Send documents to an alternative recipient such as a host family

With Selected Rows: Export to XLS | Cancel | Edit |

Visa Letter and ID Card Documents

To download or send documents to the participant's email on file, please select the corresponding button below:

If you would like to combine their documents, and/or send them to an alternate email address, please select the options below and hit submit:

COMBINED DOCUMENTS	ALTERNATE RECIPIENT
<p>Email Documents</p> <p>Download Documents</p> <p><input type="checkbox"/> Email ID Card</p> <p><input type="checkbox"/> Download ID Card</p> <p><input type="checkbox"/> Email Visa Letter</p> <p><input type="checkbox"/> Download Visa Letter</p>	<p>Recipient Name <input type="text"/></p> <p>Recipient Email <input type="text"/></p>

If you leave the alternate recipient information blank, the documents will be sent to the name and address on file for the participant.

Documents - Participant View

Viewing James Jone - Sample Plan Premium Plan

View Plan | **Download PDF** | Email PDF | Download Visa Letter | Email Visa Letter | **View Participant History**

THIS PARTICIPANT IS NOT YET ACTIVE.

First Name	James	Home Country Name	Germany	Start Date	2015-12-31
Middle Name		Address Line 1	1234 Place Ave	End Date	2016-01-28
Last Name	Jone	Address Line 2		Travel Days	29
Gender	M	City	New York	US Citizen	No
Date of Birth	1997-12-10	State Name	New York	US Destination	Yes
Email	jjones@mac.com	Country Name	United States	Underwriter	Sample Underwriter
CC Email		Postal Code	01223	Note	
Status	In-Active	Telephone		Labels	

Created: 2015-12-18 07:57:29
Updated: 2015-12-18 07:57:29

[Update James Jone](#) [Cancel James Jone](#) [Back to Plan Details](#)

You can also access a participant's documents directly from the participant view and clicking on the buttons at the top.

Exporting Participant Lists

Displaying 1-10 of 52 results.

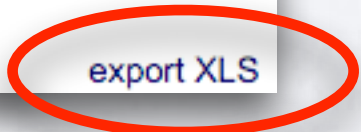
<input type="checkbox"/>	First Name	Last Name	Date of Birth	Start Date	End Date	Age	Extends To	Travel Days	Created	Updated	Status	Rows: 10
<input type="checkbox"/>	Theodore	Roosevelt	1989-10-28	2015-10-14	2016-07-14	25		275	2015-10-28	2015-10-28	Active	
<input type="checkbox"/>	William	Taft	1969-12-12	2015-10-14	2016-07-14	45		275	2015-10-28	2015-10-28	Active	
<input type="checkbox"/>	James	Brown	1997-05-21	2015-06-01	2016-05-31	18		366	2015-05-21	2015-05-21	Active	
	CINTIA	GABRIEL	1969-12-31	2014-05-02	2014-05-02	44		0	2014-04-25	2014-11-06	Cancelled	
	MARIA	ALMEIDA	1969-12-31	2014-05-02	2014-05-22	44		21	2014-04-25	2014-10-24	Expired	
	LARISSA	PORTO	1969-12-31	2014-05-03	2014-05-17	44		15	2014-04-25	2014-10-24	Expired	
	Joe	Schmoe	1996-04-17	2015-03-25	2015-09-01	18		161	2014-04-17	2015-04-08	Expired	
	Annemarie	Estrada	1996-01-04	2014-02-06	2014-07-22	18		167	2014-01-27	2014-10-24	Expired	
	Joao Pedro	Rossetto	1997-09-18	2014-01-04	2014-03-04	16		60	2013-12-17	2014-10-24	Expired	
	Sydney Salomao	da Nobrega Filho	1994-06-22	2014-01-15	2014-06-11	19		148	2013-12-17	2014-10-24	Expired	

1 2 3 4 5 6 Next > Last >>

With Selected Rows: [Export to XLS](#) | [Cancel](#) | [Edit](#) | [Bulk Labels](#) | [Email ID cards](#) | [Download ID cards](#) | [Email Visa Letters](#) | [Download Visa Letters](#) | [export XLS](#)

If you would like to export your list of participants, you can do this from the plan list view by clicking on the “export XLS” link at the bottom of the page.

Note - if you want to only export a certain group of participants, you can use the filter and advanced search sections to modify your data and just export that subset.



Frequently Asked Questions

What is a participant in review?

A participant will typically be in review because of the following situations:

- Back-dating of the policy start date
- Duplicate participant found in the system
- Enrollment outside of your plan policy period

When this happens, there is nothing you need to do. Our team continually reviews participants in review and will deal with them within 12 to 24 hours. They will either be automatically approved, or your account manager will reach out to you to fix the error.

What is the difference between a cancellation and an early return?

A cancellation of a policy is only allowed before the plan becomes effective, and allows you to terminate the whole plan coverage period and receive a full refund. If a policy has already started, cancellation is not possible but you can process an early return. Simply adjust the participant's plan end date, and any days unused will be credited back on the next invoice.

What are your standard enrollment criteria?

Typically our enrollment criteria is as follows:

- Coverage starting anytime in the future, or up to 2 weeks in the past (note backdating coverage will put them in review).
- Edits can be made at anytime, but once a plan is effective only the end date and certain fields such as address can be updated.
- Cancellations can be made before a plan becomes effective, if a plan is already effective you will need to end coverage early and pay for the days used.

These terms may vary from plan-to-plan if you have agreed this ahead of time.

I'm having problems enrolling a participant, it says that the dates are invalid?

Whether a participant is being enrolled individually or in a bulk upload, it is important that all dates are in the yyyy-mm-dd format.

Frequently Asked Questions

The participant I enrolled was flagged as a duplicate. What do I do?

A participant may be flagged in the system if the information is similar to that already present in the enrollment tool. If you are adding in a participant manually, you will notice a yellow box will appear as you add participants information so you can quickly see if this is truly a duplicate. If you still add the participant, or are adding them through our API or via bulk excel upload, you may notice some are flagged as duplicate.

If this occurs, from the main dashboard you can see all the participants that are currently flagged. If they are showing up as duplicate, you can click on their name and then either select the yellow “Not Duplicate” button or the red “Remove Duplicate” button to clear that duplicate flag.

All other flags will be handled by your account team, and are down within 24 hours, often much sooner.

The system only allows me to enroll a participant up to 364 days. How can I extend coverage?

Depending on your plan, participants can only have 364 days of coverage at any one time. However, if you have a participant who needs coverage beyond this period you can still handle this through a policy renewal.

To do this, you would report the initial 364 days of coverage and then in the “Courtesy Date” field you would put your final end date of that participants coverage. 90 days before the initial expiration date you will receive an email informing you of all the policies that will expire within the next 90 days (the courtesy date participants will be highlighted in blue). This is also viewable by clicking on the “Review Expiring” button in the plan view.

To extend coverage, simply update the policy expiration date to extend the plan and remove the courtesy date in the same action.

We also offer further customization through:

- **API Functionality** - if you wish to send enrollments electronically directly from your system, we have a dedicated API that has been built to facilitate that.
- **Email Customization** - Email template customization for initial enrollment emails, welcome emails and renewal emails.

Please contact your account manager for more details on these features and implementing them.



Thank you for your time, if you would like a live demo
please contact us directly and we would be happy to assist you

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