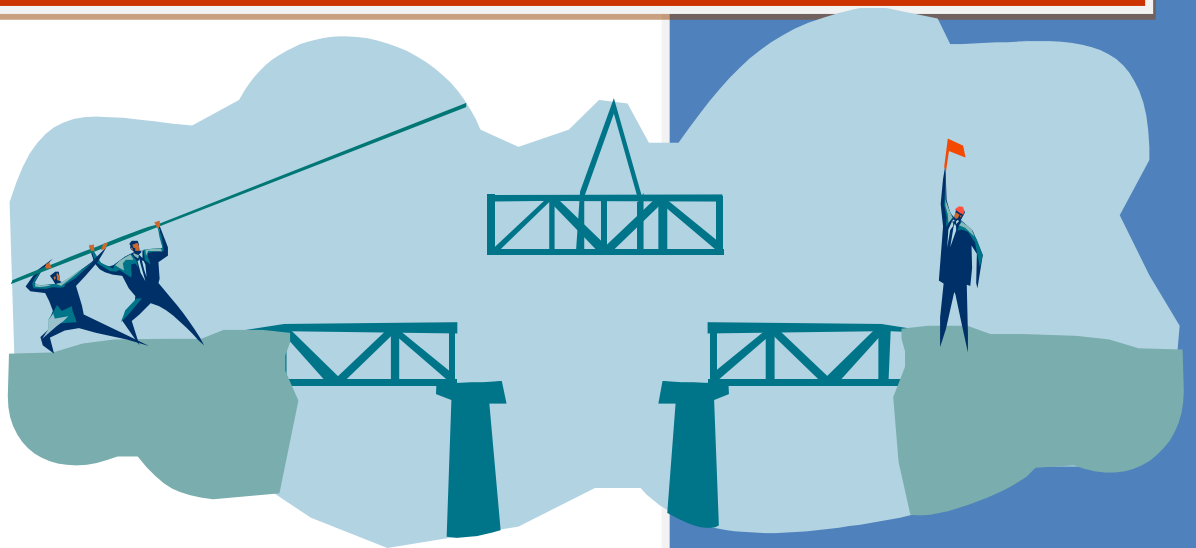


The Standard EOI Bridge Setup



selerix ✓

Bridge Documentation
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Overview

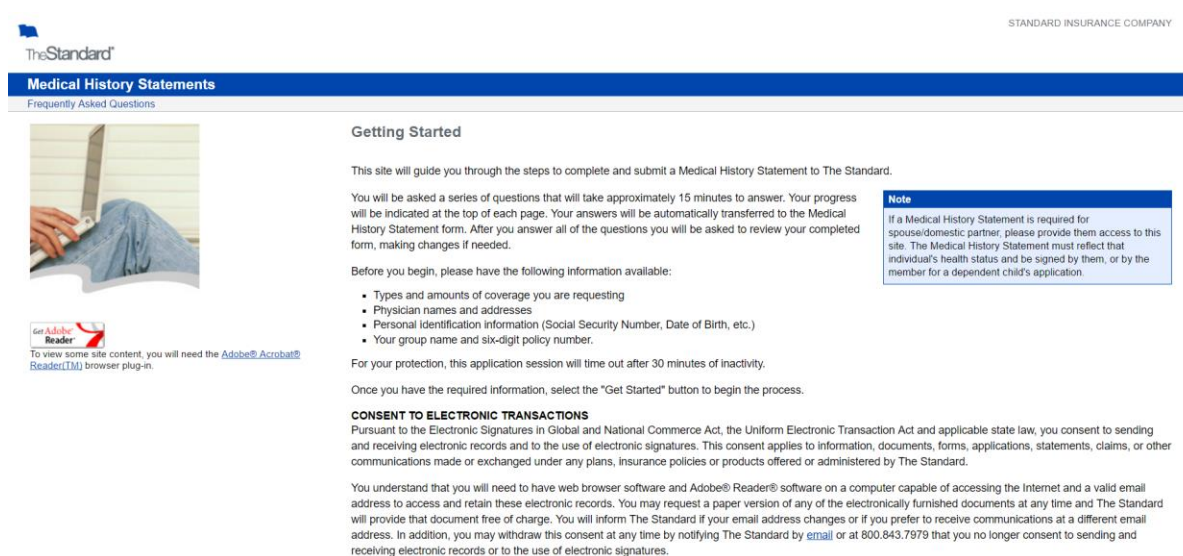
A bridge is an interface between Selerix and a carrier's system; in this case it is The Standard EOI bridge. The interface facilitates the exchange of enrollment data between the two systems.

This document provides instructions on how to set up a bridge for The Standard products where the coverage requested exceeds the guaranteed issue limit for those products. In this instance, these products collect information on an Evidence of Insurability (EOI) form, which is what setting up this bridge facilitates.*

Outcome: When the employee applies for an amount that is over the Guaranteed Issue (GI), a link to the EOI application is generated. This link displays in two places:

- On the Sign/Submit Complete page (after signing the Benefit Confirmation form)
- On the Welcome Back page (when returning to the Enrollment site during the OE period)

The employee can then click the link, and will see the following page:



The screenshot shows the 'Medical History Statements' page from The Standard Insurance Company. The page has a blue header with the company logo and name. Below the header, there is a section titled 'Medical History Statements' with a sub-link for 'Frequently Asked Questions'. The main content area is titled 'Getting Started' and contains the following text:

This site will guide you through the steps to complete and submit a Medical History Statement to The Standard.

You will be asked a series of questions that will take approximately 15 minutes to answer. Your progress will be indicated at the top of each page. Your answers will be automatically transferred to the Medical History Statement form. After you answer all of the questions you will be asked to review your completed form, making changes if needed.

Before you begin, please have the following information available:

- Types and amounts of coverage you are requesting
- Physician names and addresses
- Personal identification information (Social Security Number, Date of Birth, etc.)
- Your group name and six-digit policy number.

For your protection, this application session will time out after 30 minutes of inactivity.

Once you have the required information, select the "Get Started" button to begin the process.

CONSENT TO ELECTRONIC TRANSACTIONS

Pursuant to the Electronic Signatures in Global and National Commerce Act, the Uniform Electronic Transaction Act and applicable state law, you consent to sending and receiving electronic records and to the use of electronic signatures. This consent applies to information, documents, forms, applications, statements, claims, or other communications made or exchanged under any plans, insurance policies or products offered or administered by The Standard.

You understand that you will need to have web browser software and Adobe® Reader® software on a computer capable of accessing the Internet and a valid email address to access and retain these electronic records. You may request a paper version of any of the electronically furnished documents at any time and The Standard will provide that document free of charge. You will inform The Standard if your email address changes or if you prefer to receive communications at a different email address. In addition, you may withdraw this consent at any time by notifying The Standard by email or at 800.843.7979 that you no longer consent to sending and receiving electronic records or to the use of electronic signatures.

There is also a 'Note' box on the right side of the page that states: 'If a Medical History Statement is required for spouse/domestic partner, please provide them access to this site. The Medical History Statement must reflect that individual's health status and be signed by them, or by the member for a dependent child's application.'

The bridge must be set up properly to display the window so that the employee can complete the EOI form.

Note: The Standard does not currently return any decision information to this platform after completion. Please be sure to request a file with decisions from The Standard as part of the case setup.

Audience and Purpose

The audience for this document is primarily Selerix employees. For additional help, contact Selerix Technical Support at support@selerix.com or via phone at 214-856-4290.

Pre-Requisites

This document does not provide information on setting up the payer, product(s) and any benefit plans in a case; it assumes these are already set up and configured correctly (i.e. the guaranteed issue limits are properly set per the carrier's instructions) in the case for which the bridge will be used.

The following are the required items:

- The Standard provides the technical details, which includes the CaseID for the Employer Group.
- The Standard must specify which States will use the EOI.

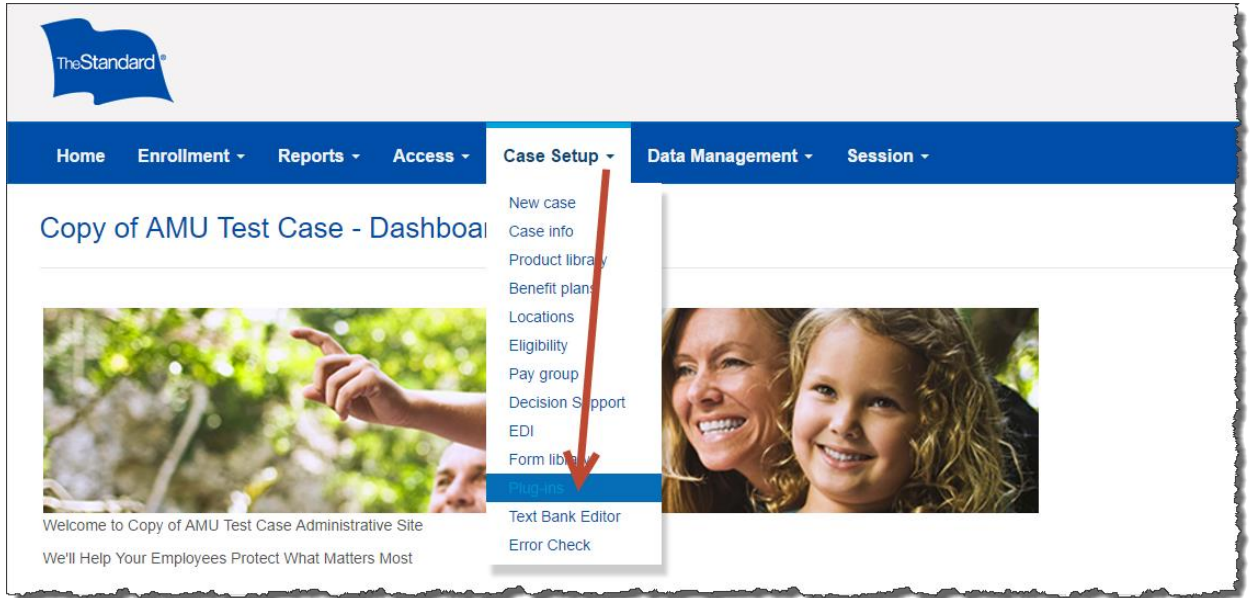
Remember: contact the carrier (The Standard) to ensure their IT department has set up their end of the bridge, so that when your case goes live you are actually connecting to their system with this bridge.

Step 1: Add the Bridge Plug-in to the Case

You must first add the bridge plug-in to the case, then configure it with the settings provided in this document.

To add The Standard EOI bridge plug-in:

1. Login to the **Admin site** that is being used for the enrollment and go to your case.
2. Select **Plug-ins** from the **Case Setup** menu.

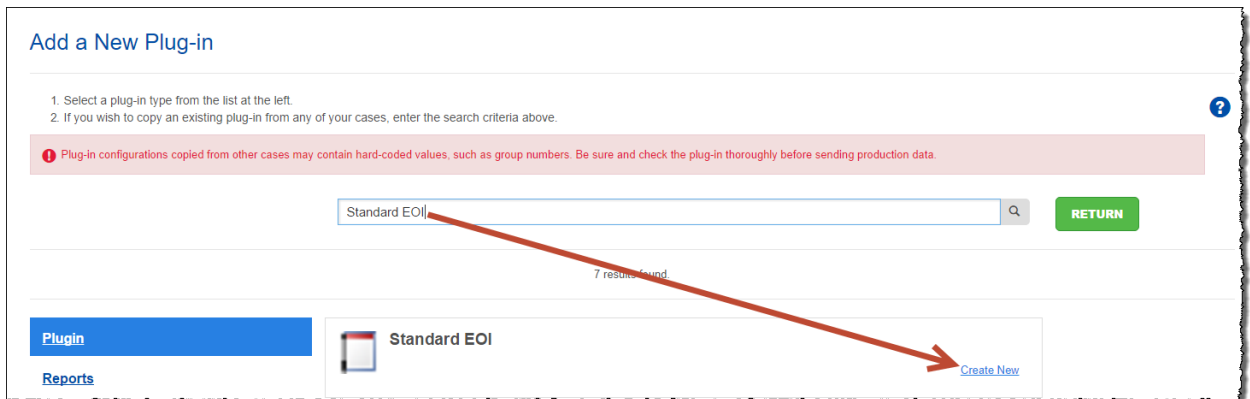


3. Click the **New** button.

[+ New](#)

The *Add a New Plug-in* screen displays options for you to create a new plug-in.

4. In the **Search bar** of the *Add a New Plug-in* screen, type **Standard EOI** and then click **Search**. The list of plug-ins re-displays.



5. Click **Create New** under the name of the Standard EOI plug-in.
The Plug-In Configuration screen displays setup options.

6. In the **Template Name** field, type a name for The Standard EOI bridge, such as The Standard EOI Form.

Plugin: New Form Providers configuration; Type: Standard EOI

General Options Change Control

Form Providers - Standard EOI

Template Name: The Standard EOI Form

Configuration Notes:

Update the current Plug-in. Allowed file types: *.plugin.

Select File

SAVE SAVE & RETURN CANCEL Changes are not finalized until you click 'Save'.

7. Click the **Save** button.
8. Click the *Options* tab.
9. For the **Description section**, complete fields as necessary:
- EOI Enrollment Mode – when will the EOI be submitted? Select: Employee submits EOI application after enrollment is complete, or Employee submits EOI application during enrollment.
 - Environment – which environment are you trying to access? Select: Testing or production.
 - Bridge embedded in IFrame or Popup Window? – This will be provided by the carrier.
 - Selerix certificate – Select when the Selerix certificate expires.

General Options Change Control

Description	Value
EOI Enrollment Mode	Employee submits EOI application after enrollment is complete
Environment	Production
Bridge embedded in IFrame or Popup Window?	Popup Window
Selerix certificate	Selerix Production (expires 11/15/2019)

10. Complete setup for each of the products that are on the case, selecting the benefit plan in the drop-down that applies to The Standard product.

Dependent Life	
Additional Child Deps Life (ACL)	Empty
Additional Spouse Deps Life (ASL)	Empty
Dependents Life (DL)	Empty
SST Dependents Life (SDL)	Empty
Child Dependents Life (XCL)	Empty
Sp & Ch Dependents Life (XDL)	Empty
Spouse Dependents Life (XSL)	Spouse Voluntary Life
Member Life	
Additional Term Life (AL)	Employee Voluntary Life
Basic Term Life (BL)	Empty
SST Life (LS)	Empty
Supplemental Life (SL)	Empty
Voluntary Life (VF)	Empty
Long Term Disability	
Buy-up Long Term Disability (BLT)	Empty
Long Term Disability (LT)	Empty
Trust Long Term Disability (TLT)	Empty
SST Long Term Disability (TS)	Empty
Voluntary Long Term Disability (VL)	Empty
Short Term Disability	
Buy-up Short Term Disability (BST)	Empty
State Mandated Disability (SD)	Empty
SST Short Term Disability (SS)	Empty
Short Term Disability (ST)	Empty
Trust Short Term Disability (TST)	Empty
ALL NONE	
SAVE	SAVE & RETURN CANCEL

11. Click the **Save** button.

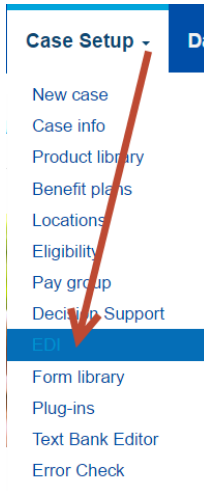
SAVE

Step 2: Setting up EDI Parameters

Last steps before testing the bridged products includes setting up the EDI control number for the case. This number is provided by The Standard for the Employer Group.

To set up EDI:

1. Select **EDI** from the **Case Setup** menu.



The **EDI** screen displays tabs for setting EDI options.

2. Set the group number as the **Control Number** for The Standard.
3. Click the **Save** button.
4. Click the **Group Numbers** tab.
5. Click the **Add** button (green plus sign at the end of the table). A new line entry is added to any existing EDI group numbers.
6. Select the product from the **Product** drop-down list.
7. Type a **description** for the associated payer.
8. For the Master Group Number Label, enter the Coverage Plan Name.
9. For the Network ID, enter the Coverage Policy Number.

 A screenshot of the EDI screen. At the top, there are filters for 'Location' (set to 'All') and 'Plan Year' (set to '04/01/2016 - 03/31/2017 (Active)'). Below this is the 'Associated Payers' section, which contains a table with columns: 'Product', 'Payer', 'Description', and a '+' icon. The table has three rows: 'Standard Life - SB (Standard Insurance Company)', 'Standard LTD - SB (Standard Insurance Company)', and 'Standard STD (Standard Insurance Company)'. Below the 'Associated Payers' table is the 'Group numbers for - Standard Life - SB' section, which contains a table with columns: 'JobClass', 'Ded Freq', 'Master Group Number', 'Master Group Number Label', 'Plan Code', 'Network ID', 'Subgroup Number', 'Plan Subcode', and 'Subnetwork ID'. The table has two rows: 'Active FTE (Active FTE)' and '24'. At the bottom of the screen, there are buttons for 'SAVE', 'CANCEL', 'IMPORT', 'EXPORT', and 'TEMPLATE'.

10. Click the **Save** button.

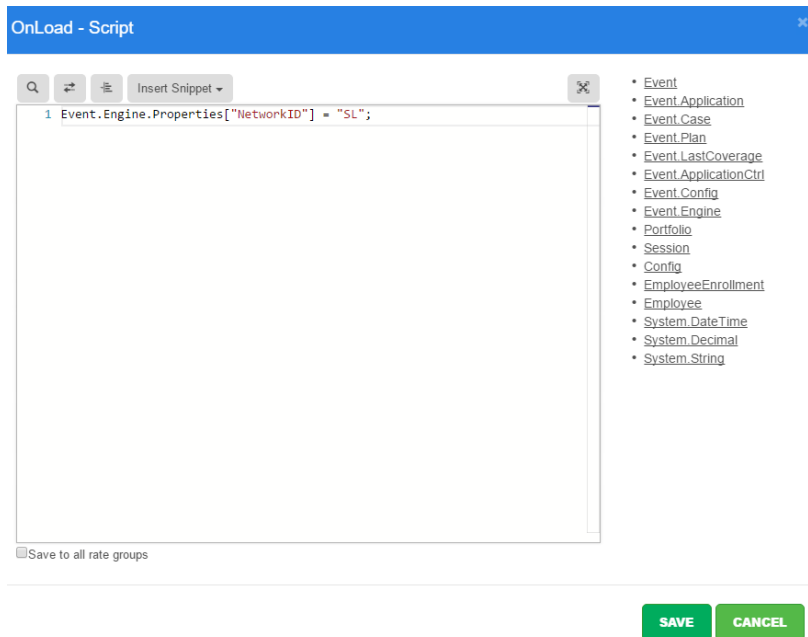
You use the OnLoad script action at the plan level, and script for the EDI parameter field that you need to use for the EOI form. The following example adds the script for assigning “SL” to the Network ID field.

1. Select **Benefit Plans** from the **Case Setup** menu.
2. Select The Standard plan to which you want to add the scriptable EDI.
3. Click the **JScript** tab.

- Click the JScript icon next to the OnLoad script to open the Scripting window.

5. Type the script that you want to use, using the following syntax:

```
Event.Engine.Properties["NAMEOFEDIFIELD"] = "VALUE";
```



6. Click the **Save** button to save your script and close the Scripting window.



7. Click the **Save** button to save the plan changes.



Step 4: Testing/Sample Enrollment

After you have set up the EOI plugin and the EDI control number, you should test to ensure that the bridge is invoked correctly when the link is clicked.

Use a test employee, and walk through the enrollment. To test the EOI bridge, ensure you select over Guaranteed Issue (GI) for the appropriate benefit plan. A link for the form will display on the Sign/Submit Complete page (after signing the Benefit Confirmation form).

At the end of the enrollment process, you will see the Sign & Submit page.

Home Me & My Family My Benefits **Sign & Submit** [LOGOUT](#)

Sign/Submit Complete

Step 3 of 3

Congratulations!

Your enrollment is now complete. You may log-in to the system at any time during the year to review your benefit elections.

IMPORTANT! You have applied for a coverage that exceeds the guaranteed limit. There is additional information and review required. Please complete the online medical history statement.

⚠ You have pending EOI applications for the following people. Click on person's name link to start EOI application.

Name	Plan
Nikki TEST	Employee Voluntary Life
zsdasdf asdfasdfa	Spouse Voluntary Life

Recap of Your Elections

Listed below is a recap of your elections including who is covered under each benefit plan and your named beneficiaries. Scroll down to the bottom of this screen to view a list of your completed enrollment forms.

✓ Group Life and AD&D

Benefit Amount	Cost
\$160,000.00 (2 x salary)	\$0.00

Click the link to open the new window for the evidence of insurability questions.



Submit Evidence of Insurability

This application process allows you to complete a medical history statement online, when evidence of insurability is required under a group insurance policy issued by The Standard. The information you provide will be used to evaluate your application. Submission of this application does not guarantee approval of coverage requiring evidence of insurability.

This process generally takes between 10 and 20 minutes if you have all required information. **Please be aware you will not have an opportunity to save a draft during this time.** For your protection, this submission session will time out after 30 minutes of inactivity.

Contact Us

Medical Underwriting

P: 800.843.7979

FAQ About Evidence of Insurability



Required Information

You **must** be prepared with the following information before you can proceed. If you do not have this information ready to reference, please print this page and return here when you have all of these listed items.

1. Member's employment details... ✓ Date of hire ✓ Earnings
2. Coverage details... ✓ Amounts currently in force ✓ Amounts requested (as appropriate under the group policy)
3. Personal identification... ✓ Date of birth ✓ Place of birth ✓ Mailing address
4. Medical conditions... ✓ Diagnoses ✓ Types of treatment ✓ Dates for treatment
5. Physicians or clinics... ✓ Names ✓ Locations ✓ Phone numbers

Note for Spouse Applicant

If this evidence of insurability submission is for a spouse applicant, he or she must complete the medical history statement and electronically sign this submission.

☐ I have read and agree to the [Terms and Consent](#).

[Cancel](#)

[START A NEW SUBMISSION](#)

If you prefer, you may [choose a printable PDF form](#) to submit evidence of insurability by mail.

Si lo prefiere, puede [optar por un formulario PDF que se puede imprimir](#) para presentar la evidencia de asegurabilidad por correo postal.

Note: The Standard does not currently return any decision information to this platform after completion. Please be sure to request a file with decisions from The Standard as part of the case setup.