






# ENROLLMENT - BENEFIT MANAGER


## STEP 1


After logging in and selecting your role click on 'Enroll Member'. You have the option to invite members individually, by selecting "Add New Member", or in bulk, by selecting "Bulk Upload", to enroll.


 **Benefit Manager**


72 Days13 Hours25 Minutes57 Seconds Demo Test


 Approve Member


 **Enroll Member**


 Manage Assistants


 Manage Notification


 Manage Transactions


 Register Members

 Sagikor Updates

 View Bill Information

 Voluntary Insurance

 Wellness Report


 **Enroll Member**

Group  
All

First Name  
Enter First Name

Last Name  
Enter Last Name

Gender  
All

Date of Birth  


Search

☒ Existing Members ☐ Dispatched ☐ Initiated

Add New Member


Bulk Member Upload


#	First Name	Last Name	Gender	Date of Birth	Group	Status	Action
1	Pansie	Bisnott	Female	Jan/17/1944	0000094001	Approved by gia	<a href="#">View</a>   <a href="#">Certificates</a>




# ENROLLMENT - BENEFIT MANAGER


## STEP 2


Upon selecting “Add New Member” the form will appear for you to enter all the relevant information need about the member.





Member


Demo Test


Claims Status


Request Replacement Card


Self Enrollment


Voluntary Insurance


eCard


Employer


Employee


Banking


Product

Dependent

Beneficiary

Health

Review

Employer Information

Group Number \*

0000094001

Account Name : Account Number \*

Company One

Employer/Company Name \*

Company Name

Benefit Classification \*

ALL

Occupation \*

Location

0

Date Hired \*

Sep/01/2000

Coverage Effective Date \*

Jan/01/2019

Salary Frequency

Annually

Salary Amount

7,147,681.00

Termination Effective Date

Select

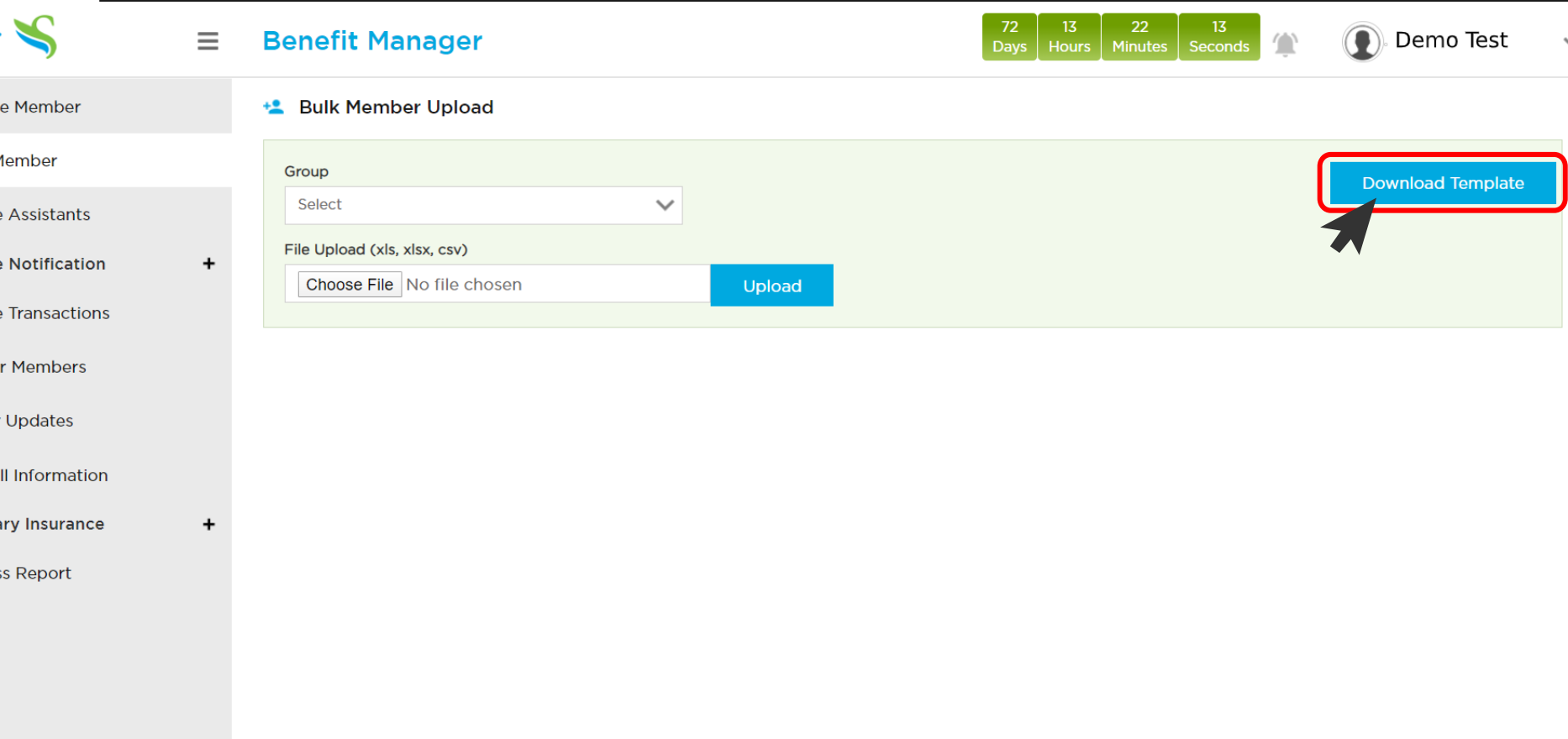
Termination Reason

Remarks

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## STEP 3

If you are inviting a large number of members in bulk click on 'Bulk Member Upload': Download the template and input your members information then upload the completed excel sheet.



The screenshot displays the 'Benefit Manager' application interface. On the left is a sidebar with a list of menu items: 'e Member', 'Member', 'e Assistants', 'e Notification', 'Transactions', 'r Members', 'Updates', 'll Information', 'ary Insurance', and 'ss Report'. The main content area is titled 'Bulk Member Upload' and contains a 'Group' dropdown menu with 'Select' as the current value. Below this is a 'File Upload (xls, xlsx, csv)' section with a 'Choose File' button, the text 'No file chosen', and an 'Upload' button. In the top right corner, there is a timer showing '72 Days', '13 Hours', '22 Minutes', and '13 Seconds', along with a notification bell icon and a user profile icon labeled 'Demo Test'. A red rectangular box highlights the 'Download Template' button, which is located in the top right corner of the main content area. A black mouse cursor arrow is pointing at this button.

**Benefit Manager**

72 Days 13 Hours 22 Minutes 13 Seconds

Demo Test

**Bulk Member Upload**

Group

Select

File Upload (xls, xlsx, csv)

Choose File No file chosen Upload

Download Template

# ENROLLMENT - BENEFIT MANAGER

## STEP 4

Ensure you review your completed form before submitting.



Benefit Manager

72  
Days

13  
Hours

25  
Minutes

57  
Seconds



Demo Test

Enroll Member

Group

All



First Name

Enter First Name

Last Name

Enter Last Name

Gender

All



Date of Birth



Search

☒ Existing Members ☐ Dispatched ☐ Initiated

Add New Member

Bulk Member Upload

#	First Name	Last Name	Gender	Date of Birth	Group	Status	Action
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