

“

What is your favorite part
of Open Enrollment?

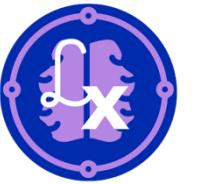
”



Learn**synx**
Mastering Knowledge, Together.

Smooth Sailing with EDI This Summer

Catch The Breeze for Stress-free EDI



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A Few Reminders...



Questions



Chat



Handout & Recordings



Your Feedback

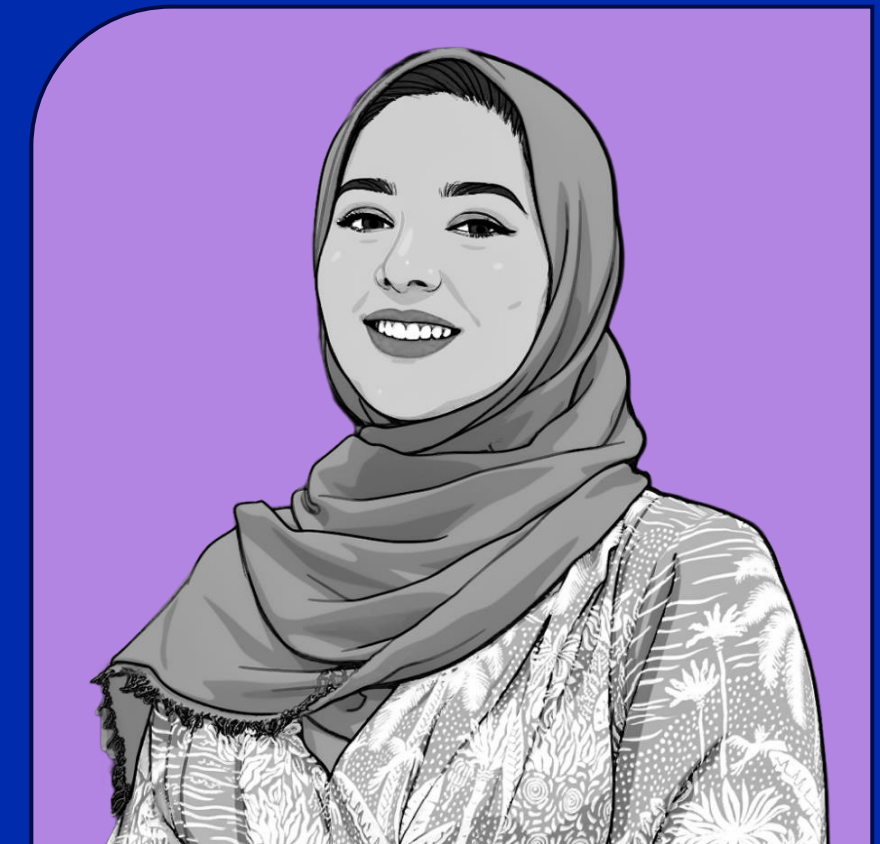


Today's Presenters:



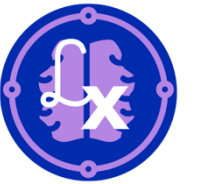
Liz Gerlach

Training Supervisor



Halima Khan

Talent Development Specialist



Objectives

By the end of today's webinar...



A Quick Dip

Defining an Export and the Types We Use



Beachside Breakdown

Recognize the Connection from Our Carrier Network to Your Live Exports



Mapping The Waters

Pros and Cons of EDI & Exploring Alternatives

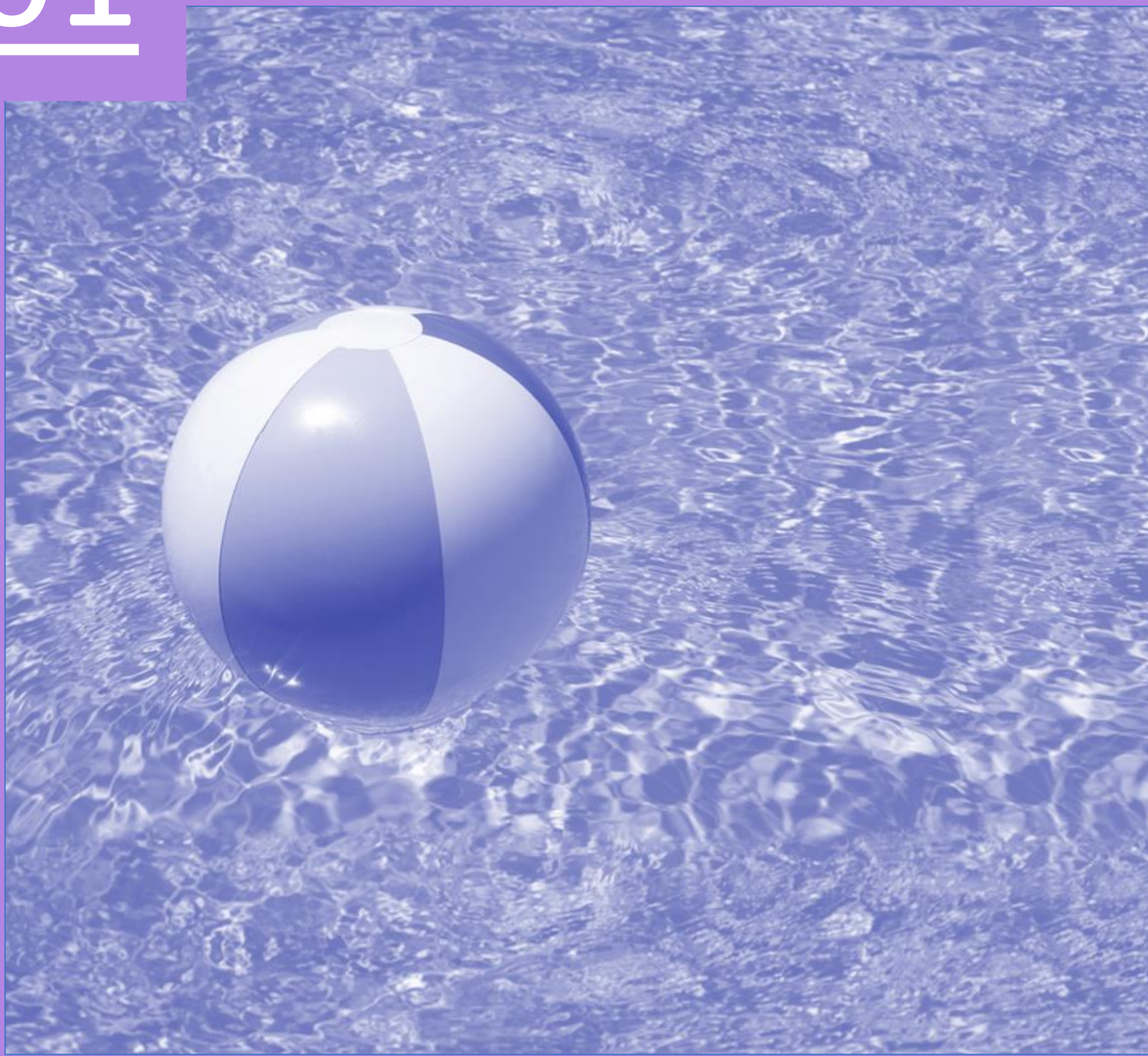


Smooth Sailing

Demonstrate Knowledge of Tools to Pinpoint when Information is Delivered to Carrier Vendors



01



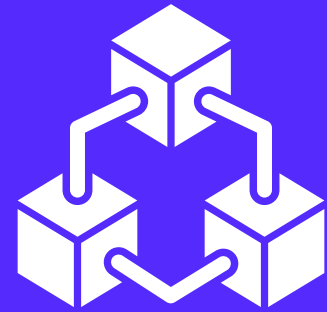
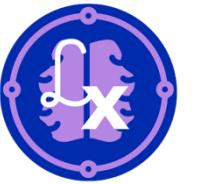
A Quick
Dip



Electronic Data Interchange

- Employee Demographics
- Employee Elections
- Employee Premiums





Standard Exports

- Standardized Format
- Shorter implementation Period
- Ability to Send to Vendors



Custom Exports

- Transmission of Files
- Approved Vendors Only
- Individualized Format



Standard Format Export

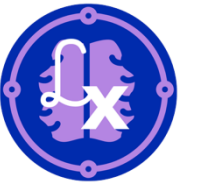
Group Number	Group Name	Employee Last Name	Employee First Name	Employee SSN	Employee DOB	Employee Payroll Frequency	Employee Date Of Hire	Employee Status	Employee Hours Worked	Job Title	Division	Benefit
12345	Training - BrightPassage	HUBster	Birth - Benny	000000043	1/1/1980	12	1/1/2001	Active	40		Division 2	Vision
12345	Training - BrightPassage	HUBster	Birth - Benny	000000043	1/1/1980	12	1/1/2001	Active	40		Division 2	Vision
12345	Training - BrightPassage	HUBster	Birth - Benny	000000043	1/1/1980	12	1/1/2001	Active	40		Division 2	Vision
12345	Training - BrightPassage	HUBster	Birth - Benny	000000043	1/1/1980	12	1/1/2001	Active	40		Division 2	Vision
12345	Training - BrightPassage	HUBster	Marriage - Benny	000000058	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	HUBster	Marriage - Benny	000000058	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Washington	George	000000076	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Washington	George	000000076	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Washington	George	000000076	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Arthur	Chester	000000050	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Arthur	Chester	000000050	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Arthur	Chester	000000050	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Arthur	Chester	000000050	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buchanan	James	000000016	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buchanan	James	000000016	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buchanan	James	000000016	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buchanan	James	000000016	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buren	Martin	000000024	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buren	Martin	000000024	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buren	Martin	000000024	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Buren	Martin	000000024	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Jackson	Andrew	000000038	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
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12345	Training - BrightPassage	Jackson	Andrew	000000038	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Adams	John	000000082	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Adams	John	000000082	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Adams	John	000000082	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision
12345	Training - BrightPassage	Adams	John	000000082	1/1/1980	12	1/1/2001	Active	40		Division 3	Vision



02



Beachside Breakdown



The logo for unum, featuring the word 'unum' in a bold, blue, sans-serif font with three dots above the 'u'.



The logo for Humana, featuring the word 'Humana' in a green, sans-serif font with a registered trademark symbol.

The logo for VOYA FINANCIAL, featuring the word 'VOYA' in a large, orange, sans-serif font, with 'FINANCIAL' in a smaller, black, sans-serif font below it.

The logo for aetna, featuring a purple heart icon followed by the word 'aetna' in a purple, sans-serif font.

The logo for eye Med, featuring the word 'eye' in a green, sans-serif font and 'Med' in a grey, sans-serif font below it.

The logo for Colonial Life, featuring the words 'Colonial Life' in a blue, serif font with a registered trademark symbol.

The logo for SYMETRA, featuring a blue stylized bird icon above the word 'SYMETRA' in a black, sans-serif font, with 'RETIREMENT | BENEFITS | LIFE' in a smaller font below.

The logo for 5STAR LIFE INSURANCE COMPANY, featuring a large '5' and 'STAR' in blue, with 'LIFE INSURANCE COMPANY' in a smaller, blue, sans-serif font below.

The logo for Aflac, featuring the word 'Aflac' in a blue, sans-serif font with a small duck head icon integrated into the 'i'.



The logo for hsabank, featuring a green stylized 'h' icon followed by the word 'hsabank' in a dark green, sans-serif font.

The logo for LegalShield, featuring a purple shield icon followed by the word 'LegalShield' in a purple, sans-serif font.

The logo for Allstate BENEFITS, featuring a blue circular icon with two hands shaking, followed by the word 'Allstate' in a blue, sans-serif font and 'BENEFITS' in a smaller, blue, sans-serif font below.

The logo for ONEAMERICA, featuring the words 'ONEAMERICA' in a blue, sans-serif font.

The logo for masa, featuring the word 'masa' in a dark blue, sans-serif font followed by a small blue cross-like icon.

The logo for SuperiorVision, featuring a blue sunburst icon followed by the word 'SuperiorVision' in a black, sans-serif font.

The logo for ManhattanLife, featuring a small illustration of the Statue of Liberty, followed by the word 'ManhattanLife' in a teal, sans-serif font.



The logo for Cigna, featuring the word 'Cigna' in a blue, sans-serif font.

The logo for Guardian, featuring a green stylized 'G' icon followed by the word 'Guardian' in a blue, sans-serif font.

The logo for Mutual of Omaha, featuring a blue silhouette of a goat head, followed by the words 'Mutual of Omaha' in a blue, sans-serif font.

The logo for BlueCross BlueShield, featuring a blue cross icon and a blue shield icon, followed by the words 'BlueCross BlueShield' in a black, sans-serif font.

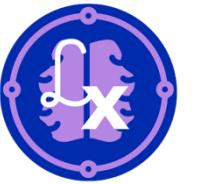
The logo for APL, featuring the letters 'APL' in a large, black, sans-serif font, with 'AMERICAN PUBLIC LIFE' in a smaller, black, sans-serif font below.

The logo for nbs, featuring a yellow curved line above the letters 'nbs' in a grey, sans-serif font, with 'national benefit services' in a smaller, grey, sans-serif font below.

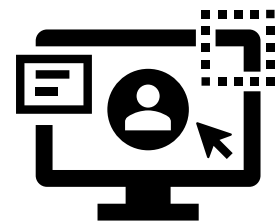
The logo for Lincoln Financial Group, featuring a red stylized 'L' icon followed by the word 'Lincoln' in a red, serif font and 'Financial Group' in a smaller, red, sans-serif font below.

The logo for DELTA DENTAL, featuring a green stylized 'D' icon followed by the words 'DELTA DENTAL' in a green, sans-serif font.

The logo for CHUBB, featuring the word 'CHUBB' in a large, black, sans-serif font.



Employee's Perspective

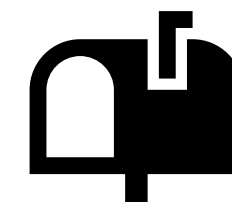


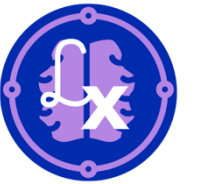
Elections Made

Employee logs into THEbenefitsHUB and selects from offered plan options.

Cards Delivered

ID Cards are sent out from the carrier based on enrollment data





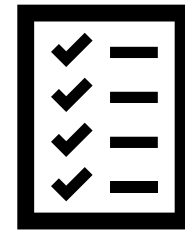
Behind The Scenes

(Preparing for OE)



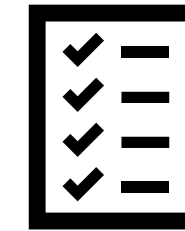
Broker Form

Each year we ask brokers for information concerning proposed plan changes.



Plans Tested

Each year, we perform internal tests to ensure plans show correctly.

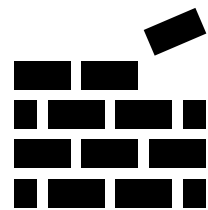


EDI Files Tested

Once again, we perform internal checks to ensure information shows correctly.

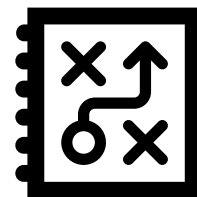
Plans Built

Benefit plans are updated to reflect new year rates and information.



EDI Files Mapped

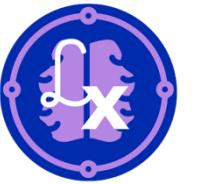
EDI Files for the new plan year are created and linked to the plans that were created.



Broker Review

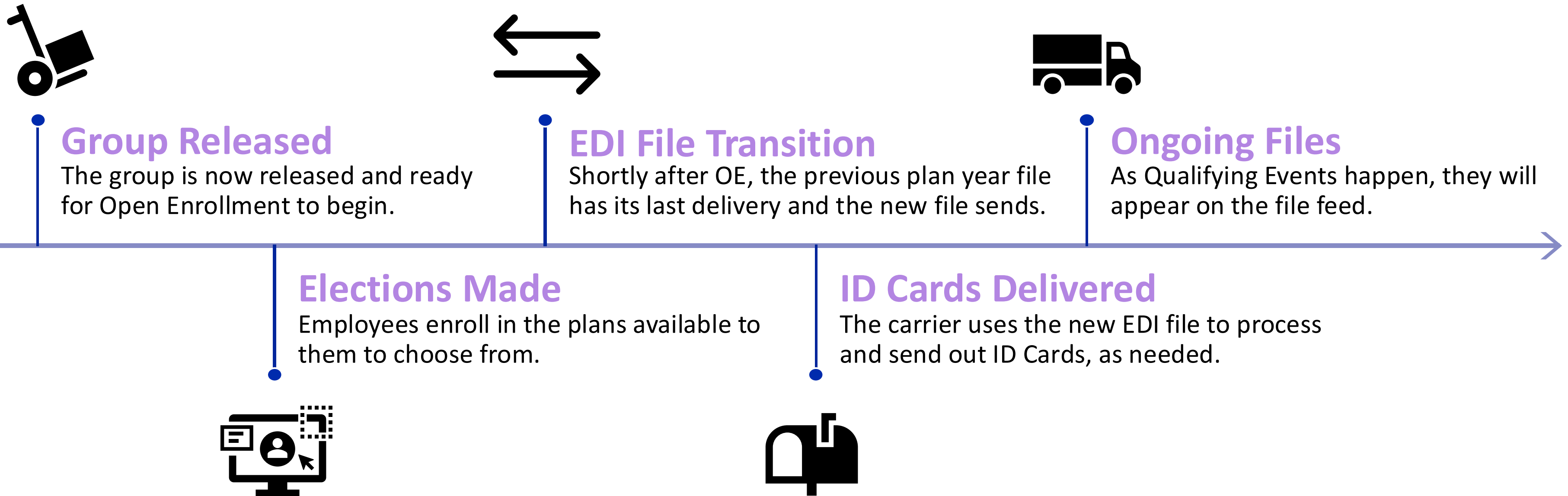
The Broker reviews what was created and gives the thumbs up for release.





Behind The Scenes

(To OE and Beyond!)





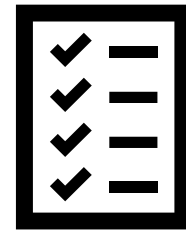
Behind The Scenes

(Preparing for OE When Carriers Change)



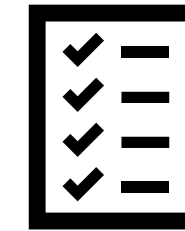
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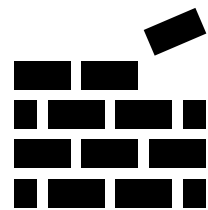


EDI Files Tested

Once again, we perform internal checks to ensure information shows correctly.

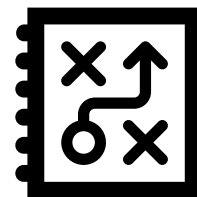
Plans Built

Benefit plans are updated to reflect new year rates and information.



EDI Files Cloned

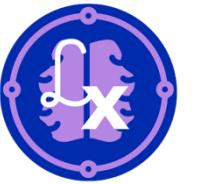
EDI Files for the new plan year are created and linked to the plans that were created.



Broker Review

The Broker reviews what was created and gives the thumbs up for release.





Behind The Scenes

(Preparing for OE When Carriers Change)



Broker Form

Each year we ask brokers for information concerning proposed plan changes.



Plans Tested

Each year, we perform internal tests to ensure plans show correctly.

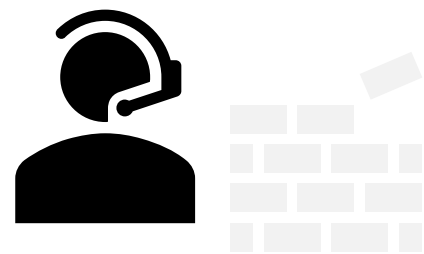


EDI Files Tested

Once again, we perform internal checks to ensure information shows correctly.

BT Team Reviews/Connects

BT EDI Team connects with Vendor Contacts to discuss file needs.



EDI File Built/Mapped

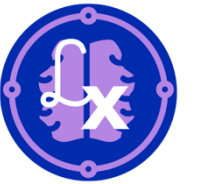
EDI Team, using the pre-approved carrier format, sets up file to match carrier needs.



Broker Review

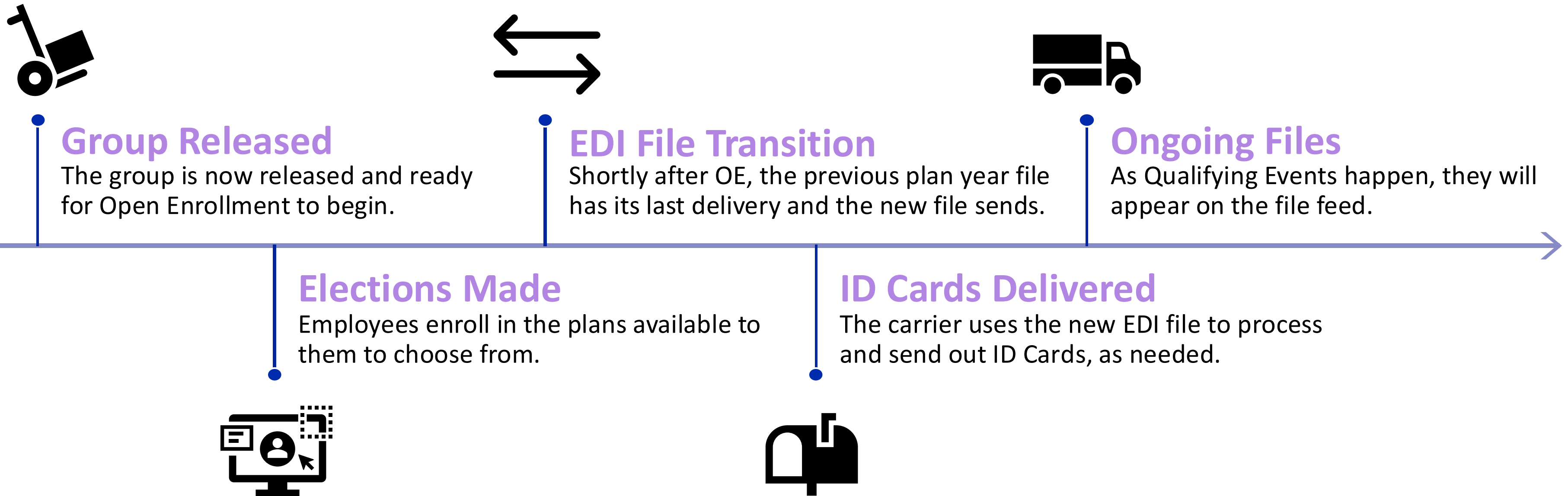
The Broker reviews what was created and gives the thumbs up for release.





Behind The Scenes

(To OE and Beyond!)

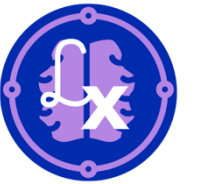




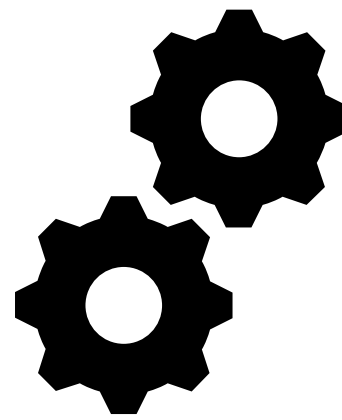
03



Mapping the Waters

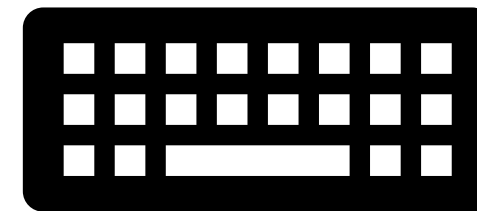


Benefits of Utilizing EDI



It's Automated

EDI files are delivered on a pre-decided basis and sent to the carrier based on their file delivery preference.



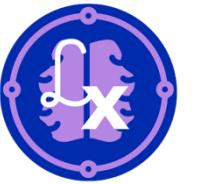
It's Easy

By removing the need for manual keying in each system, it takes some of the time burden off of you.

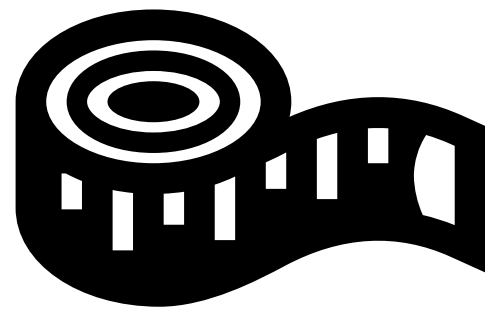


It's Reliable

We're only as good as our data. There's less concern about typo errors compared to manual vendor entry.

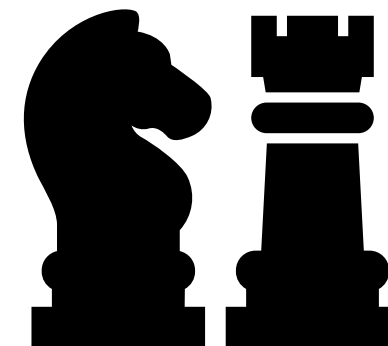


Limitations of EDI



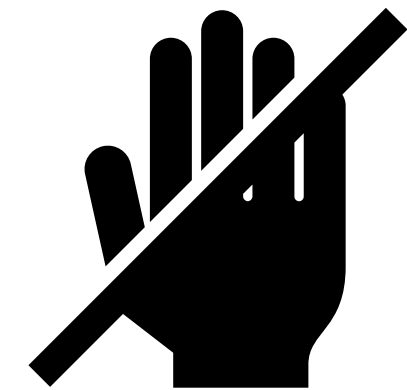
Size Minimums

Smaller groups are often not able to utilize EDI files.



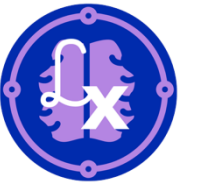
Timing Strategy

If making multiple changes, you often have to wait between files for changes.



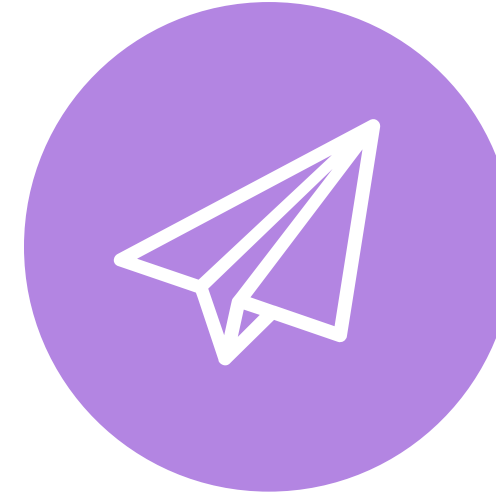
Carrier Acceptance

Not all carriers want carrier files and may refuse one being needed.



Alternative Options

Possibilities for the Impossible



Standard Export



Plan Enrollment Report



Standard Payroll Report



Monthly Billing Report

Welcome

Understanding EDI

Connecting To Carriers

Benefits of EDI

Tools for Success

Today's Activity

Questions



Standard Export Example

Group Name	Employee Last Name	Employee First Name	Employee SSN	Employee DOB	Employee Payroll Frequency	Employee Date Of Hire	Employee Status	Employee Hours Worked	Job Title	Division	Benefit	Plan Identifier 1	Plan Identifier 2	Plan Name	Tier	Covered Member Relationship	Covered Member Last Name	Covered Member First Name	Covered Member DOB	Covered Member SSN	Effective Date	Term Date	Date Entered	Date Terminated	Requested Coverage	Approved Coverage	Approved ER Cost	Approved EE Cost	Salary	Home Phone	Work Phone	Gender	Address 1	Address 2	City	State	Zip Code	Email	
Bright Passage	Bright Passage	ADAMS	JOHN	100000077	1/1/73	24	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Spouse	ADAMS	ANGAL	1/1/75	100000078	9/1/26		7/23/26		0	0	0	20	46755	1234567890	9876543210	Female	136 Fake St		Dallas	TX	75002	johna@brightpassage.com	
Bright Passage	Bright Passage	ADAMS	JOHN	100000077	1/1/73	24	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Child	ADAMS	ANGAL	1/1/01	100000079	9/1/26		7/23/26		0	0	0	20	46755	1234567890	9876543210	Female	136 Fake St		Dallas	TX	75002	johna@brightpassage.com	
Bright Passage	Bright Passage	ADAMS	JOHN	100000077	1/1/73	24	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Child	ADAMS	JOHN QUINCY	1/1/03	100000080	9/1/26		7/23/26		0	0	0	20	46755	1234567890	9876543210	Male	136 Fake St		Dallas	TX	75002	johna@brightpassage.com	
Bright Passage	Bright Passage	ADAMS	JOHN	100000077	1/1/73	24	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Child	ADAMS	SUSANNA	1/1/06	100000081	9/1/26		7/23/26		0	0	0	20	46755	1234567890	9876543210	Female	136 Fake St		Dallas	TX	75002	johna@brightpassage.com	
Bright Passage	Bright Passage	ADAMS	JOHN	100000077	1/1/73	24	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Child	ADAMS	CHARLES	1/1/09	100000082	9/1/26		7/23/26		0	0	0	20	46755	1234567890	9876543210	Male	136 Fake St		Dallas	TX	75002	johna@brightpassage.com	
Bright Passage	Bright Passage	ADAMS	JOHN	100000077	1/1/73	24	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Child	ADAMS	THOMAS	1/1/12	100000083	9/1/26		7/23/26		0	0	0	20	46755	1234567890	9876543210	Male	136 Fake St		Dallas	TX	75002	johna@brightpassage.com	
Bright Passage	Bright Passage	ADAMN	AJICE	100000026	1/1/68	24	1/1/01	Active	25/400	Dallas	Velvet	130/150			High Plan	ENP	Employee	ADAMN	AJICE	1/1/68	100000026	9/1/26		8/2/26		0	0	0	9.5	74500	1234567890	9876543210	Female	120 Fake St		Dallas	TX	75002	adamn@brightpassage.com
Bright Passage	Bright Passage	BALL	AJICE	100000029	1/1/66	24	1/1/11	Active	40	Dallas	Velvet	130/150			Low Plan	ENP	Employee	BALL	Alice	1/1/66	100000029	9/1/26		8/14/26		0	0	0	8.5	24900	1234567890	9876543210	Female	121 Fake St		Dallas	TX	75002	aball@brightpassage.com
Bright Passage	Bright Passage	CHRISTIE	AGATHA	100000030	1/1/79	24	1/1/13	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Employee	CHRISTIE	AGATHA	1/1/79	100000030	9/1/26		8/13/26		0	0	0	20	32800	1234567890	9876543210	Female	122 Fake St		Dallas	TX	75002	achristie@brightpassage.com
Bright Passage	Bright Passage	CHRISTIE	AGATHA	100000030	1/1/79	24	1/1/13	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Spouse	CHRISTIE	ARCHIBALD	1/1/79	100000031	9/1/26		8/13/26		0	0	0	20	32800	1234567890	9876543210	Male	122 Fake St		Dallas	TX	75002	achristie@brightpassage.com
Bright Passage	Bright Passage	CHRISTIE	AGATHA	100000030	1/1/79	24	1/1/13	Active	40	Dallas	Velvet	130/150			High Plan	FAM	Child	CHRISTIE	ROSALIND	1/1/15	100000032	9/1/26		8/13/26		0	0	0	20	32800	1234567890	9876543210	Female	122 Fake St		Dallas	TX	75002	achristie@brightpassage.com
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Employee	CHURCHILL	WINSTON	1/1/72	100000084	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Male	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Spouse	CHURCHILL	CLARENTHINE	1/1/78	100000085	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Female	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	CHURCHILL	DANA	1/1/00	100000086	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Female	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	CHURCHILL	RANDOLPH	1/1/02	100000087	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Male	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	CHURCHILL	SWANH	1/1/05	100000088	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Female	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	CHURCHILL	HARGOLD	1/1/08	100000089	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Female	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	CHURCHILL	WINSTON	100000084	1/1/72	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	CHURCHILL	HARRY	1/1/11	100000090	9/1/26		7/15/26		0	0	0	19	66370	1234567890	9876543210	Female	127 Fake St		Dallas	TX	75002	echurch@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Employee	DICKENS	CHARLES	1/1/76	100000091	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Male	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Spouse	DICKENS	CATHERINE	1/1/78	100000092	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Female	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	DICKENS	CHARLES JR.	1/1/03	100000093	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Male	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	DICKENS	MARY	1/1/05	100000094	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Female	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	DICKENS	KATE	1/1/07	100000095	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Female	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	DICKENS	WALTER	1/1/09	100000096	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Male	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	DICKENS	CHARLES	100000091	1/1/76	24	Active	40	Dallas	Velvet	130/150			Low Plan	FAM	Child	DICKENS	FRANCIS	1/1/12	100000097	9/1/26		7/14/26		0	0	0	19	56105	1234567890	9876543210	Male	130 Fake St		Dallas	TX	75002	cdickens@brightpassage.com	
Bright Passage	Bright Passage	GRANT	ULYSSES	100000071	1/1/77	24	Active	40																															



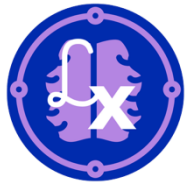
Standard Export Example

Company Information

Employee Information

Member Information

Election Information



Logout, alice,admin

ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

Administration Dashboard

▼

Employee Administration

▼

Company Reporting

▲

Company Communication

▼

LEARNsynx

▼

Custom Reports ▼

Quick Reports ▲

- Annualized Deduction
- Ascender Payroll
- Benefit Level Comparison
- Employee Acknowledgments
- Login Statistics
- Monthly Billing
- New Hire Email
- Plan Election Comparison
- Skyward
- Standard Payroll

Standard Reports ▼

My Report History





Logout, alice,admin

ADMINISTRATION MENU > STANDARD PAYROLL

NEED HELP? | GIVE FEEDBACK

COMPANY REPORTING

Standard Payroll

Select a Saved Report: Select One v

Select a date: August v20 v2026 v

Select Divisions:

Available

>><<

Selected

Austin Office
Dallas Office

Select Providers:

Aetna
American Health Plans
American Public Life
Blue Cross/Blue Shield
Global Insurance
Great American

>><<

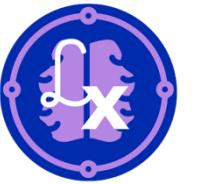
Select Benefit Plan Types:

>><<

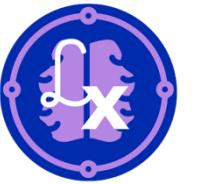
Select Employee Pay Schedules:

>

12 Pay



100000005	2443502	HUBSTER	PETER	Austin Office	0.00	1.00	20250101	20301231	BL	26	POST
100000009	2437639	HUBSTER	FELICITY	Austin Office	15.00	5.00	20250901	20301231	DENA	12	PRE
100000009	2437639	HUBSTER	FELICITY	Austin Office	670.00	250.00	20250901	20301231	MED	12	PRE
100000009	2437639	HUBSTER	FELICITY	Austin Office	20.00	0.00	20250901	20301231	MED	12	PRE
100000009	2437639	HUBSTER	FELICITY	Austin Office	56.25	0.00	20251001	20301231	LTD	12	POST
100000009	2437639	HUBSTER	FELICITY	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000026	2451581	ADMIN	ALICE	Dallas Office	22.00	0.00	20250901	20301231	VTL	26	POST
100000026	2451581	ADMIN	ALICE	Dallas Office	37.00	250.00	20250901	20301231	MED	26	PRE
100000026	2451581	ADMIN	ALICE	Dallas Office	10.00	0.00	20250901	20301231	MED	26	PRE
100000026	2451581	ADMIN	ALICE	Dallas Office	5.00	5.00	20250901	20301231	DENA	26	PRE
100000026	2451581	ADMIN	ALICE	Dallas Office	20.00	0.00	20250901	20301231	CAN	26	PRE
100000026	2451581	ADMIN	ALICE	Dallas Office	0.00	1.00	20250901	20301231	BL	26	POST
100000029	2467755	BALL	ALICE	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000029	2467755	BALL	ALICE	Austin Office	20.00	0.00	20241020	20301231	CAN	12	PRE
100000029	2467755	BALL	ALICE	Austin Office	5.00	5.00	20250101	20301231	DENA	12	PRE
100000029	2467755	BALL	ALICE	Austin Office	37.00	250.00	20241020	20301231	MED	12	PRE
100000029	2467755	BALL	ALICE	Austin Office	22.50	0.00	20251101	20301231	LTD	12	POST
100000029	2467755	BALL	ALICE	Austin Office	18.00	0.00	20251101	20301231	VTL	12	POST
100000030	2467757	CHRISTIE	AGATHA	Austin Office	36.00	0.00	20251101	20301231	VTL	12	POST
100000030	2467757	CHRISTIE	AGATHA	Austin Office	24.75	0.00	20251101	20301231	LTD	12	POST
100000030	2467757	CHRISTIE	AGATHA	Austin Office	1.00	0.00	20241020	20301231	VDTL	12	POST
100000030	2467757	CHRISTIE	AGATHA	Austin Office	670.00	250.00	20241020	20301231	MED	12	PRE
100000030	2467757	CHRISTIE	AGATHA	Austin Office	15.00	5.00	20250101	20301231	DENA	12	PRE
100000030	2467757	CHRISTIE	AGATHA	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	5.00	5.00	20250101	20301231	DENA	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	20.00	0.00	20241020	20301231	CAN	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	37.00	250.00	20241020	20301231	MED	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	10.00	0.00	20241020	20301231	MED	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	21.00	0.00	20251101	20301231	LTD	12	POST
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	20.00	0.00	20251101	20301231	VTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	20.00	0.00	20251101	20301231	VTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	21.00	0.00	20251101	20301231	LTD	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	1.00	0.00	20241020	20301231	VDTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	9.00	0.00	20251101	20301231	VDTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	670.00	250.00	20241020	20301231	MED	12	PRE
100000034	2467759	LOVELACE	ADA	Austin Office	25.00	0.00	20241020	20301231	MED	12	PRE
100000034	2467759	LOVELACE	ADA	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	670.00	250.00	20241020	20301231	MED	12	PRE
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	25.00	0.00	20241020	20301231	MED	12	PRE
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	2.00	0.00	20251101	20301231	VDTL	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	22.50	0.00	20251101	20301231	LTD	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	38.00	0.00	20251101	20301231	VTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	20.00	0.00	20251101	20301231	VTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	22.50	0.00	20251101	20301231	LTD	12	POST
100000044	2467762	VERNE	JULES	Austin Office	1.00	0.00	20241020	20301231	VDTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	10.00	0.00	20251101	20301231	VDTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	670.00	250.00	20260501	20301231	MED	12	PRE
100000044	2467762	VERNE	JULES	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	60.00	0.00	20260501	20301231	CAN	12	PRE
100000044	2467762	VERNE	JULES	Austin Office	15.00	5.00	20260201	20301231	DENA	12	PRE



Home Insert Draw Page Layout Formulas Data Review View Automate Developer Acrobat

Get Data (Power Query) From Picture Queries & Connections Refresh All Properties Workbook Links Stocks Currencies Geography

Clear Reapply Sort Filter Text to Columns Analyze Data Flash Fill Remove Duplicates Data Validation Consolidate What-If Analysis Group Ungroup Subtotal Analysis Tools

Comments Share

Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the Data Type that best describes your data.

☒ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Preview of selected data:

Preview of selected data:

1	100000005	2443502	HUBSTER	PETER	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
2	100000009	2437639	HUBSTER	FELICITY	Austin Office	15.00	5.00	20250901	20301231	DENA	12	PRE
3	100000009	2437639	HUBSTER	FELICITY	Austin Office	670.00	250.00	20250901	20301231	MED	12	PRE
4	100000009	2437639	HUBSTER	FELICITY	Austin Office	20.00	0.00	20250901	20301231	MED	12	PRE
5	100000009	2437639	HUBSTER	FELICITY	Austin Office	56.25	0.00	20251001	20301231	LTD	12	POST
6	100000009	2437639	HUBSTER	FELICITY	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
7	100000026	2451581	ADMIN	ALICE	Dallas Office	22.00	0.00	20250901	20301231	VTL	12	POST

Cancel < Back Next > Finish



Home Insert Draw Page Layout Formulas Data Review View Automate Developer Acrobat

Get Data (Power Query) From Picture Queries & Connections Refresh All Properties Workbook Links Stocks Currencies Geography Sort Filter Clear Reapply Advanced Text to Columns Analyze Data Flash Fill Remove Duplicates Data Validation Consolidate What-If Analysis Group Ungroup Subtotal Analysis Tools

Comments Share

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains.

Delimiters

☐ Tab ☐ Treat consecutive delimiters as one

☐ Semicolon

☐ Comma

☐ Space

☒ Other: |

Text qualifier: " ↺

Preview of selected data:

100000005	2443502	HUBSTER	PETER	Austin Office	0.00	1.00	20250101	20301231	BL	26	POST
100000009	2437639	HUBSTER	FELICITY	Austin Office	15.00	5.00	20250901	20301231	DENA	12	PRE
100000009	2437639	HUBSTER	FELICITY	Austin Office	670.00	250.00	20250901	20301231	MED	12	PRE
100000009	2437639	HUBSTER	FELICITY	Austin Office	20.00	0.00	20250901	20301231	MED	12	PRE
100000009	2437639	HUBSTER	FELICITY	Austin Office	56.25	0.00	20251001	20301231	LTD	12	POST
100000009	2437639	HUBSTER	FELICITY	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST
100000026	2451581	ADMIN	ALICE	Dallas Office	22.00	0.00	20250901	20301231	VTL	26	POST

Cancel < Back Next > Finish



HomeInsertDrawPage LayoutFormulasDataReviewViewAutomateDeveloperAcrobat

Get Data (Power Query)

From Picture

Refresh All

Queries & Connections

Properties

Workbook Links

Stocks

Currencies

Geography

Sort

Filter

Clear

Reapply

Advanced

Text to Columns

Analyze Data

Flash Fill

Remove Duplicates

Data Validation

Consolidate

What-If Analysis

Group

Ungroup

Subtotal

Analysis Tools

CommentsShare

N60

fx

	A	B	C	D	E		U	V	W	X	Y	Z
1	100000005	2443502	HUBSTER	PETER	Austin Office	0.00	1.00					
2	100000009	2437639	HUBSTER	FELICITY	Austin Office	15.00	5.00					
3	100000009	2437639	HUBSTER	FELICITY	Austin Office	670.00						
4	100000009	2437639	HUBSTER	FELICITY	Austin Office	20.00	0.00					
5	100000009	2437639	HUBSTER	FELICITY	Austin Office	56.25	0.00					
6	100000009	2437639	HUBSTER	FELICITY	Austin Office	0.00	1.00					
7	100000026	2451581	ADMIN	ALICE	Dallas Office	22.00	0.00					
8	100000026	2451581	ADMIN	ALICE	Dallas Office	37.00	250.00					
9	100000026	2451581	ADMIN	ALICE	Dallas Office	10.00	0.00					
10	100000026	2451581	ADMIN	ALICE	Dallas Office	5.00	5.00					
11	100000026	2451581	ADMIN	ALICE	Dallas Office	20.00	0.00					
12	100000026	2451581	ADMIN	ALICE	Dallas Office	0.00	1.00					
13	100000029	2467755	BALL	ALICE	Austin Office	0.00	1.00					
14	100000029	2467755	BALL	ALICE	Austin Office	20.00	0.00					
15	100000029	2467755	BALL	ALICE	Austin Office	5.00	5.00					
16	100000029	2467755	BALL	ALICE	Austin Office	37.00	250.00					
17	100000029	2467755	BALL	ALICE	Austin Office	22.50	0.00					
18	100000029	2467755	BALL	ALICE	Austin Office	18.00	0.00					
19	100000030	2467757	CHRISTIE	AGATHA	Austin Office	36.00	0.00					
20	100000030	2467757	CHRISTIE	AGATHA	Austin Office	24.75	0.00					
21	100000030	2467757	CHRISTIE	AGATHA	Austin Office	1.00	0.00					
22	100000030	2467757	CHRISTIE	AGATHA	Austin Office	670.00	2.00					
23	100000030	2467757	CHRISTIE	AGATHA	Austin Office	15.00	5.00					
24	100000030	2467757	CHRISTIE	AGATHA	Austin Office	0.00	1.00					
25	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	0.00	1.00					
26	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	5.00	5.00					
27	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	20.00	0.00					
28	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	37.00	250.00					
29	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	10.00	0.00					
30	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	2.00	0.00					
31	100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	20.00	0.00					
32	100000034	2467759	LOVELACE	ADA	Austin Office	20.00	0.00					
33	100000034	2467759	LOVELACE	ADA	Austin Office	21.00	0.00					
34	100000034	2467759	LOVELACE	ADA	Austin Office	1.00	0.00					
35	100000034	2467759	LOVELACE	ADA	Austin Office	9.00	0.00					
36	100000034	2467759	LOVELACE	ADA	Austin Office	670.00	250.00					
37	100000034	2467759	LOVELACE	ADA	Austin Office	25.00	0.00					
38	100000034	2467759	LOVELACE	ADA	Austin Office	0.00	1.00					
39	100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office							
40	100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office							
41	100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	2.00	0.00					
42	100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	2.00	0.00					
43	100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	22.50	0.00					
44	100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	38.00	0.00					
45	100000044	2467762	VERNE	JULES	Austin Office	20.00	0.00					
46	100000044	2467762	VERNE	JULES	Austin Office	22.50	0.00					
47	100000044	2467762	VERNE	JULES	Austin Office	1.00	0.00					
48	100000044	2467762	VERNE	JULES	Austin Office	10.00	0.00					
49	100000044	2467762	VERNE	JULES	Austin Office	670.00	250.00					
50	100000044	2467762	VERNE	JULES	Austin Office	0.00	1.00					
51	100000044	2467762	VERNE	JULES	Austin Office	60.00	0.00					
52	100000044	2467762	VERNE	JULES	Austin Office	15.00	5.00					
53												

Convert Text to Columns Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

☒ General

☐ Text

☐ Date: MDY

☐ Do not import column (Skip)

Destination: \$A\$1

Advanced...

Preview of selected data:

General	General	General	General	General	General	General	General	General	General	General	General	General
100000005	2443502	HUBSTER	PETER	Austin Office	0.00	1.00	20250101	20301231	BL	26	POST	
100000009	2437639	HUBSTER	FELICITY	Austin Office	15.00	5.00	20250901	20301231	DENA	12	PRE	
100000009	2437639	HUBSTER	FELICITY	Austin Office	670.00	250.00	20250901	20301231	MED	12	PRE	
100000009	2437639	HUBSTER	FELICITY	Austin Office	20.00	0.00	20250901	20301231	MED	12	PRE	
100000009	2437639	HUBSTER	FELICITY	Austin Office	56.25	0.00	20251001	20301231	LTD	12	POST	
100000009	2437639	HUBSTER	FELICITY	Austin Office	0.00	1.00	20250101	20301231	BL	12	POST	
100000026	2451581	ADMIN	ALICE	Dallas Office	22.00	0.00	20250901	20301231	VTL	26	POST	

Cancel< BackNext >Finish





100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	20	0	20241020	20301231	CAN	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	37	250	20241020	20301231	MED	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	10	0	20241020	20301231	MED	12	PRE
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	21	0	20251101	20301231	LTD	12	POST
100000033	2467758	COPERNICUS	NICOLAUS	Austin Office	20	0	20251101	20301231	VTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	20	0	20251101	20301231	VTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	21	0	20251101	20301231	LTD	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	1	0	20241020	20301231	VDTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	9	0	20251101	20301231	VDTL	12	POST
100000034	2467759	LOVELACE	ADA	Austin Office	670	250	20241020	20301231	MED	12	PRE
100000034	2467759	LOVELACE	ADA	Austin Office	25	0	20241020	20301231	MED	12	PRE
100000034	2467759	LOVELACE	ADA	Austin Office	0	1	20250101	20301231	BL	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	0	1	20250101	20301231	BL	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	670	250	20241020	20301231	MED	12	PRE
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	25	0	20241020	20301231	MED	12	PRE
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	2	0	20251101	20301231	VDTL	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	22.5	0	20251101	20301231	LTD	12	POST
100000039	2467760	SKLODOWSKA-CURIE	MARIA	Austin Office	38	0	20251101	20301231	VTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	20	0	20251101	20301231	VTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	22.5	0	20251101	20301231	LTD	12	POST
100000044	2467762	VERNE	JULES	Austin Office	1	0	20241020	20301231	VDTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	10	0	20251101	20301231	VDTL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	670	250	20260501	20301231	MED	12	PRE
100000044	2467762	VERNE	JULES	Austin Office	0	1	20250101	20301231	BL	12	POST
100000044	2467762	VERNE	JULES	Austin Office	60	0	20260501	20301231	CAN	12	PRE
100000044	2467762	VERNE	JULES	Austin Office	15	5	20260201	20301231	DENA	12	PRE



Logout, alice,admin

ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

Administration Dashboard

▼

Employee Administration

▼

Company Reporting

▲

Company Communication

▼

LEARNsynx

▼



- Custom Reports ▼
- Quick Reports ▲
- Annualized Deduction
- Ascender Payroll
- Benefit Level Comparison
- Employee Acknowledgments
- Login Statistics
- Monthly Billing
- New Hire Email
- Plan Election Comparison
- Skyward
- Standard Payroll
- Standard Reports ▼
- My Report History



Logout, alice,admin

ADMINISTRATION MENU > MONTHLY BILLING

NEED HELP? | GIVE FEEDBACK

COMPANY REPORTING

Monthly Billing

Select a Saved Report: Select One

Report Date Span: August 2026

Select Divisions:

Available

>><<

Selected

Austin Office
Dallas Office

Select Providers:

Aetna
American Health Plans
American Public Life
Blue Cross/Blue Shield
Global Insurance
Great American

>><<

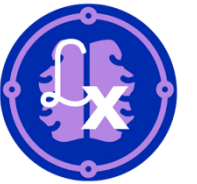
Select Benefit Plan Types:

>><<

Select Employee Pay Schedules:

>

12 Pay

[illegible]



ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

Administration Dashboard

Employee Administration

Company Reporting

Company Communication

LEARNsynx

- Custom Reports
- Quick Reports
- Standard Reports
- Add/Change/Term
- Beneficiaries
- Benefit Renewal Opportunities
- Billing Report History
- Carrier Billing
- COBRA Employee Status
- Consolidated Billing
- Dependent Census
- Dependent Enrollment
- Employee Census
- Employee COB
- Employee Eligibility
- Employee Journal
- Employee Spending Credits
- Import Validation
- Imputed Income (Table 1)
- Payroll Deduction
- Payroll Deduction Changes
- Plan Comparison
- Plan Enrollment
- Plan Summary
- Reviews
- System Utilization
- My Report History





COMPANY REPORTING

Plan Enrollment Report

Report Date Span

August 1 2026

to

August 31 2026

Select Consortiums

All Consortiums

Select Divisions

All Divisions

Austin Office

Dallas Office

Select Employee

Categories

All Employee Categories

Class 1

Class 2

Select Employees

All Employees

Admin, Alice

Ball, Alice

Christie, Agatha

Copernicus, Nicolaus

Select Benefit Plan Types

All Benefit Plan Types

Basic Life

Medical

Medical Declination

Medical Offering

Select Plans

All Plans

[Basic Life] Global Insurance - Basic Life [2685588]

[Basic Life] Global Insurance - Basic Life [2685624]

[Basic Life] Global Insurance - Basic Life [2706739]

[Basic Life] Global Insurance - Basic Life [3326882]

New Hires Only

No

Enrollment Type

Covered

New Enrollee

Terminated

Show Report For

All Statuses

Terminated



Report Date: August 1, 2026 to August 31, 2026																								
Select Consc: All Consortiums																								
Select Divisi: All Divisions																								
Select Emplo: All Employee Categories																								
Select Emplo: All Employees																								
Select Benef: All Benefit Plan Types																								
Select Plans: All Plans																								
New Hires Or: No																								
Enrollment Ty: Covered																								
Show Report: All Statuses																								
Employee Lo: All																								
Select Plan D: Enrollments Only																								
Select Health: Health Tier Label																								
Member Type: All Member Types																								
Archival Type: CSV																								
Training - BrightPassage																								
Division Name	Employee	Social Security	Employment	Date of Birth	Date of Enrollment	Gross Annual	No. of Dependents	Home Phone	Employee Location	Plan Name	Health Tier	Member Name	Member Type	Member DOE	Member SSN	Member Gender	Effective Date	Termination Date	Enrollment Date	Date Terminated	Approved Coverage	Approved Employer Premium	Approved Employee Premium	
Austin Office	Ball, Alice	100-00-0029	Active	1/1/79	10/20/15	\$40,000.00	0	8666341057	Complete	Basic Life	---	Ball, Alice	Employee	1/1/79	100-00-0029	F	1/1/25	12/31/30	10/20/25	---	\$10,000.00	\$1.00	\$0.00	
										Dental Plan	Employee	Ball, Alice	Employee	1/1/79	100-00-0029	F	1/1/25	12/31/30	10/20/25	---	\$0.00	\$5.00	\$5.00	
										Employee Life	---	Ball, Alice	Employee	1/1/79	100-00-0029	F	11/1/25	12/31/30	11/11/25	---	\$90,000.00	\$0.00	\$18.00	
										Group Cancer	Employee	Ball, Alice	Employee	1/1/79	100-00-0029	F	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$20.00	
										Medical Option 1	Employee	Ball, Alice	Employee	1/1/79	100-00-0029	F	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
										Option 1	Employee	Ball, Alice	Employee	1/1/79	100-00-0029	F	10/20/24	12/31/30	10/20/25	---	\$0.00	\$250.00	\$37.00	
										Plan A - Injury	---	Ball, Alice	Employee	1/1/79	100-00-0029	F	11/1/25	12/31/30	11/11/25	---	\$900.00	\$0.00	\$22.50	
Ball, Alice Subtotal: 7 returned plans																					\$100,900.00	\$256.00	\$102.50	
	Christie, Agatha	100-00-0030	Active	1/1/75	10/20/17	\$40,000.00	2	8666341057	Complete	Basic Life	---	Christie, Agatha	Employee	1/1/75	100-00-0030	F	1/1/25	12/31/30	10/20/25	---	\$10,000.00	\$1.00	\$0.00	
										Child(ren) Life	---	Hicks, Rosalind	Child	1/1/15	000-00-0032	F	10/20/24	12/31/30	10/20/25	---	\$5,000.00	\$0.00	\$1.00	
										Dental Plan	Family	Christie, Agatha	Employee	1/1/75	100-00-0030	F	1/1/25	12/31/30	10/20/25	---	\$0.00	\$5.00	\$15.00	
											Family	Christie, Archibald	Spouse	1/1/79	000-00-0031	M	1/1/25	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
											Family	Hicks, Rosalind	Child	1/1/15	000-00-0032	F	1/1/25	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
Dental Plan Subtotal:																					\$0.00	\$5.00	\$15.00	
										Employee Life	---	Christie, Agatha	Employee	1/1/75	100-00-0030	F	11/1/25	12/31/30	11/11/25	---	\$180,000.00	\$0.00	\$36.00	
										Medical Option 1	Employee	Christie, Agatha	Employee	1/1/75	100-00-0030	F	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
										Option 1	Family	Christie, Agatha	Employee	1/1/75	100-00-0030	F	10/20/24	12/31/30	10/20/25	---	\$0.00	\$250.00	\$670.00	
											Family	Christie, Archibald	Spouse	1/1/79	000-00-0031	M	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
											Family	Hicks, Rosalind	Child	1/1/15	000-00-0032	F	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
Option 1 Subtotal:																						\$0.00	\$250.00	\$670.00
										Plan A - Injury	---	Christie, Agatha	Employee	1/1/75	100-00-0030	F	11/1/25	12/31/30	11/11/25	---	\$1,100.00	\$0.00	\$24.75	
Christie, Agatha Subtotal: 7 returned plans																					\$196,100.00	\$256.00	\$746.75	
	Copernicus, Ber	100-00-0033	Active	1/1/73	10/20/09	\$40,000.00	0	8666341057	Complete	Basic Life	---	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	1/1/25	12/31/30	10/20/25	---	\$10,000.00	\$1.00	\$0.00	
										Dental Plan	Employee	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	1/1/25	12/31/30	10/20/25	---	\$0.00	\$5.00	\$5.00	
										Employee Life	---	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	11/1/25	12/31/30	11/11/25	---	\$100,000.00	\$0.00	\$20.00	
										Group Cancer	Employee	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$20.00	
										Low Option 1	Employee	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$10.00	
										Medical Option 1	Employee	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	10/20/24	12/31/30	10/20/25	---	\$0.00	\$0.00	\$0.00	
										Option 1	Employee	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	10/20/24	12/31/30	10/20/25	---	\$0.00	\$250.00	\$37.00	
										Plan A - Injury	---	Copernicus, Nicolaus	Employee	1/1/73	100-00-0033	M	11/1/25	12/31/30	11/11/25	---	\$1,000.00	\$0.00	\$21.00	
Copernicus, Nicolaus Subtotal: 8 returned plans																					\$111,000.00	\$256.00	\$113.00	
	HUBster, Ben	000-00-0001	Active	1/1/76	7/2/21	\$40,000.00	3	---	Incomplete	Child(ren) Life	---	HUBster, Trent	Child	1/1/16	000-00-0003	M	7/1/26	12/31/30	7/2/26	---	\$5,000.00	\$0.00	\$1.00	
										Dental Plan	Family	HUBster, Benny	Employee	1/1/76	000-00-0001	M	7/1/26	12/31/30	7/2/26	---	\$0.00	\$5.00	\$15.00	
											Family	HUBster, Taylor	Spouse	1/1/80	000-00-0002	F	7/1/26	12/31/30	7/2/26	---	\$0.00	\$0.00	\$0.00	



04



Smooth Sailing



Logout, alice.admin.

ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

Administration Dashboard

^

Employee Administration

▼

Company Reporting

▼

Company Communication

▼

LEARNsynx

▼

- Administrative Tools ▼
- Summaries ^
- Benefit Summary
- Company Summary
- Export Summary
- Profile
- Security Settings
- FTP File Access
- History File





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ADMINISTRATION MENU > EXPORT SUMMARY

NEED HELP? | GIVE FEEDBACK

EXPORT SUMMARY

This page displays all current, actively delivering exports as well as future exports that are finalized for delivery. For information on past exports, please contact your Account Representative and a report will be made available.



Export Name	First Production File	Last Scheduled Date	Schedule Name	Run Frequency
American Health Plans - Dental - Ongoing [Training]	12/25/2024	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday
American Health Plans - Vision - Ongoing [Training]	08/21/2019	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday

Back



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ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

Administration Dashboard
^

Employee Administration
v

Company Reporting
v

Company Communication
v

LEARNsynx
v

- Administrative Tools ^
- Acknowledgment Settings

EDI/File Viewer

IMNS Dashboard

Login Statistics

Qualifying Life Event Settings
- Summaries v
- Profile
- Security Settings
- FTP File Access
- History File



Logout, alice.admin.

ADMINISTRATION MENU > EDI VIEWER

NEED HELP? | GIVE FEEDBACK

SCHEDULED EVENTS

Exports



☐ Show Inactive



American Health Plans - Dental - Ongoing [Training]
American Health Plans - Vision - Ongoing [Training]

Back

Imports

☐ Show Inactive

No Imports Setup

Reports

☐ Show Inactive

No Scheduled Reports

Forms

☐ Show Inactive

No Scheduled Forms



AMERICAN HEALTH PLANS

File History

Select Date Span:

June

1

2026

Filename

PlanEnrollment_58505_2026-07-22-00-12-50.txt
PlanEnrollment_58505_2026-07-08-00-13-09.txt
PlanEnrollment_58505_2026-06-24-00-12-59.txt
PlanEnrollment_58505_2026-06-10-00-13-25.txt

Back

July 2026						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Executed	Delivery Status
/2026 00:12:50	Results: 07/22/2026 00:13:53
/2026 00:13:10	Results: 07/08/2026 00:13:20
/2026 00:12:59	Results: 06/24/2026 00:21:59
/2026 00:13:26	Results: 06/10/2026 00:19:16



AMERICAN HEALTH PLANS - DENTAL - ONGOING [TRAINING]

File History

Select Date Span:

June

1

2026

 to

July

31

2026

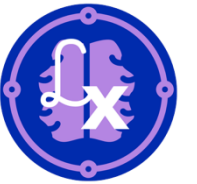
Search

Filename	Filesize	Export Type	File Type	Contains	Executed By	Date Executed	Delivery Status
PlanEnrollment_58505_2026-07-22-00-12-50.txt	11028	Production	Full File	Live	Scheduler	07/22/2026 00:12:50	Results: 07/22/2026 00:13:53
PlanEnrollment_58505_2026-07-08-00-13-09.txt	11028	Production	Full File	Live	Scheduler	07/08/2026 00:13:10	Results: 07/08/2026 00:13:20
PlanEnrollment_58505_2026-06-24-00-12-59.txt	11169	Production	Full File	Live	Scheduler	06/24/2026 00:12:59	Results: 06/24/2026 00:21:59
PlanEnrollment_58505_2026-06-10-00-13-25.txt	10333	Production	Full File	Live	Scheduler	06/10/2026 00:13:26	Results: 06/10/2026 00:19:16

Back



	A	B	C	D	E	F	G	H	I	J	K	L
1	GroupName	EmployeeLastName	EmployeeFirstName	EmployeeSSN	EmployeePayrollFrequency	EmployeeDOH	EmployeeStatus	Employee	Benefit	PlanName	Tier	CoveredMemberRelationship
2	Training - BrightPassage	Admin	Alice	100000026	26	8/19/2025	Active	40	Dental	Dental Plan	Employee	Employee
3	Training - BrightPassage	Ball	Alice	100000029	12	10/20/2015	Active	40	Dental	Dental Plan	Employee	Employee
4	Training - BrightPassage	Christie	Agatha	100000030	12	10/20/2017	Active	40	Dental	Dental Plan	Family [F]	Employee
5	Training - BrightPassage	Christie	Agatha	100000030	12	10/20/2017	Active	40	Dental	Dental Plan	Family [F]	Spouse
6	Training - BrightPassage	Christie	Agatha	100000030	12	10/20/2017	Active	40	Dental	Dental Plan	Family [F]	Child
7	Training - BrightPassage	Copernicus	Nicolaus	100000033	12	10/20/2009	Active	40	Dental	Dental Plan	Employee	Employee
8	Training - BrightPassage	HUBster	Adam	100000088	26	7/2/2025	Active	40	Dental	Dental Plan	Employee	Employee
9	Training - BrightPassage	HUBster	Benny	1	12	7/2/2021	Active	40	Dental	Dental Plan	Family [F]	Employee
10	Training - BrightPassage	HUBster	Benny	1	12	7/2/2021	Active	40	Dental	Dental Plan	Family [F]	Spouse
11	Training - BrightPassage	HUBster	Benny	1	12	7/2/2021	Active	40	Dental	Dental Plan	Family [F]	Child
12	Training - BrightPassage	HUBster	Felicity	100000009	12	7/23/2020	Active	40	Dental	Dental Plan	Family [F]	Employee
13	Training - BrightPassage	HUBster	Felicity	100000009	12	7/23/2020	Active	40	Dental	Dental Plan	Family [F]	Spouse
14	Training - BrightPassage	HUBster	Felicity	100000009	12	7/23/2020	Active	40	Dental	Dental Plan	Family [F]	Child
15	Training - BrightPassage	HUBster	Sandy	100000087	26	7/2/2025	Active	40	Dental	Dental Plan	Employee	Employee
16	Training - BrightPassage	Hubster	Sarah	67	26	12/4/2025	Active	40	Dental	Dental Plan	Employee	Employee
17	Training - BrightPassage	Hubster	Sarah	67	26	12/4/2025	Active	40	Dental	Dental Plan	Employee	Spouse
18	Training - BrightPassage	Soprano	Anthony	14	12	12/15/2025	Active	40	Dental	Dental Plan	Family [F]	Employee
19	Training - BrightPassage	Soprano	Anthony	14	12	12/15/2025	Active	40	Dental	Dental Plan	Family [F]	Spouse
20	Training - BrightPassage	Soprano	Anthony	14	12	12/15/2025	Active	40	Dental	Dental Plan	Family [F]	Child
21	Training - BrightPassage	Verne	Jules	100000044	12	10/20/2018	Active	40	Dental	Dental Plan	Family [F]	Employee
22	Training - BrightPassage	Verne	Jules	100000044	12	10/20/2018	Active	40	Dental	Dental Plan	Family [F]	Spouse
23	Training - BrightPassage	Verne	Jules	100000044	12	10/20/2018	Active	40	Dental	Dental Plan	Family [F]	Child
24	Training - BrightPassage	Verne	Jules	100000044	12	10/20/2018	Active	40	Dental	Dental Plan	Family [F]	Child
25	Training - BrightPassage	Washington	George	100000049	12	10/20/2016	Active	40	Dental	Dental Plan	Employee	Employee
26	Training - BrightPassage	Washington	George	100000049	12	10/20/2016	Active	40	Dental	Dental Plan	Employee	Spouse



Export Summary

General overview of all
current exports



EDI/File Viewer

List of all exports
Ability to view inactive exports



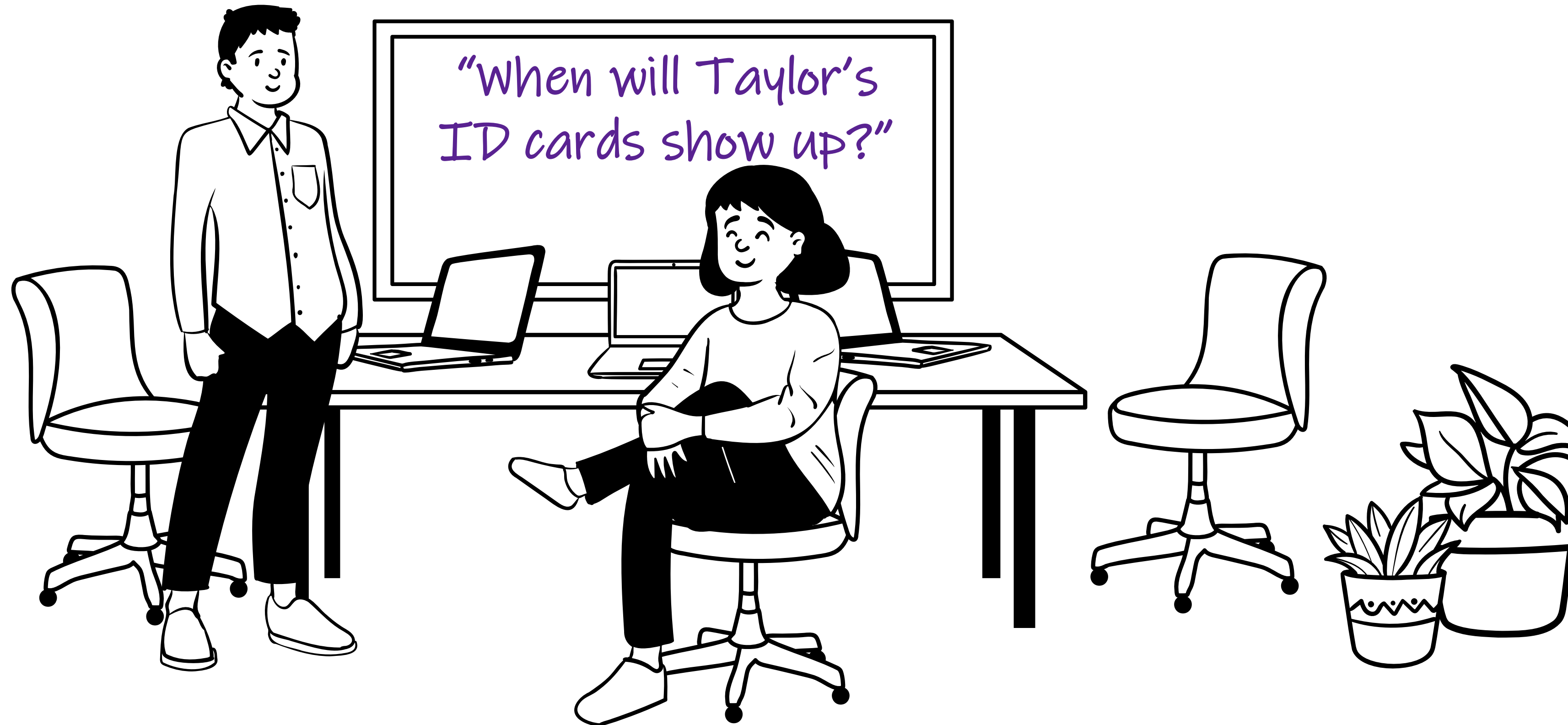
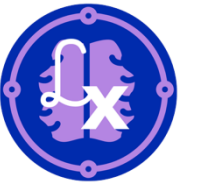
*Both pages will take you to the File
Viewer of an individual export!*



05



Today's Activity



[Logout, alice.admin.](#)[ADMINISTRATION MENU](#) > [EXPORT SUMMARY](#)[NEED HELP?](#) | [GIVE FEEDBACK](#)

EXPORT SUMMARY

This page displays all current, actively delivering exports as well as future exports that are finalized for delivery. For information on past exports, please contact your Account Representative and a report will be made available.

Export Name	First Production File	Last Scheduled Date	Schedule Name	Run Frequency
American Health Plans - Dental - Ongoing [Training]	12/25/2024	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday
American Health Plans - Vision - Ongoing [Training]	08/21/2019	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday

[Back](#)

[Logout, alice.admin.](#)[ADMINISTRATION MENU](#) > [EDI VIEWER](#)[NEED HELP?](#) | [GIVE FEEDBACK](#)

SCHEDULED EVENTS

Exports

☐ Show Inactive[American Health Plans - Dental - Ongoing \[Training\]](#)[American Health Plans - Vision - Ongoing \[Training\]](#)

Imports

☐ Show Inactive

No Imports Setup

Reports

☐ Show Inactive

No Scheduled Reports

Forms

☐ Show Inactive

No Scheduled Forms

[Back](#)

[ADMINISTRATION MENU](#) > [EDI VIEWER](#) > [SCHEDULED](#)

AMERICAN HEALTH PLANS

File History

Select Date Span:

Filename

[PlanEnrollment_58505_2026-08-19-00-17-31.txt](#)
[PlanEnrollment_58505_2026-08-05-00-12-35.txt](#)
[PlanEnrollment_58505_2026-07-22-00-12-50.txt](#)
[PlanEnrollment_58505_2026-07-08-00-13-09.txt](#)

[Back](#)

September 2026						
SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			
30	31					

[Logout, alice.admin.](#)[NEED HELP?](#) | [GIVE FEEDBACK](#)

Delivery Status

Results: 08/19/2026 00:20:32
Results: 08/05/2026 00:19:55
Results: 07/22/2026 00:13:53
Results: 07/08/2026 00:13:20



Thank you for attending!

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