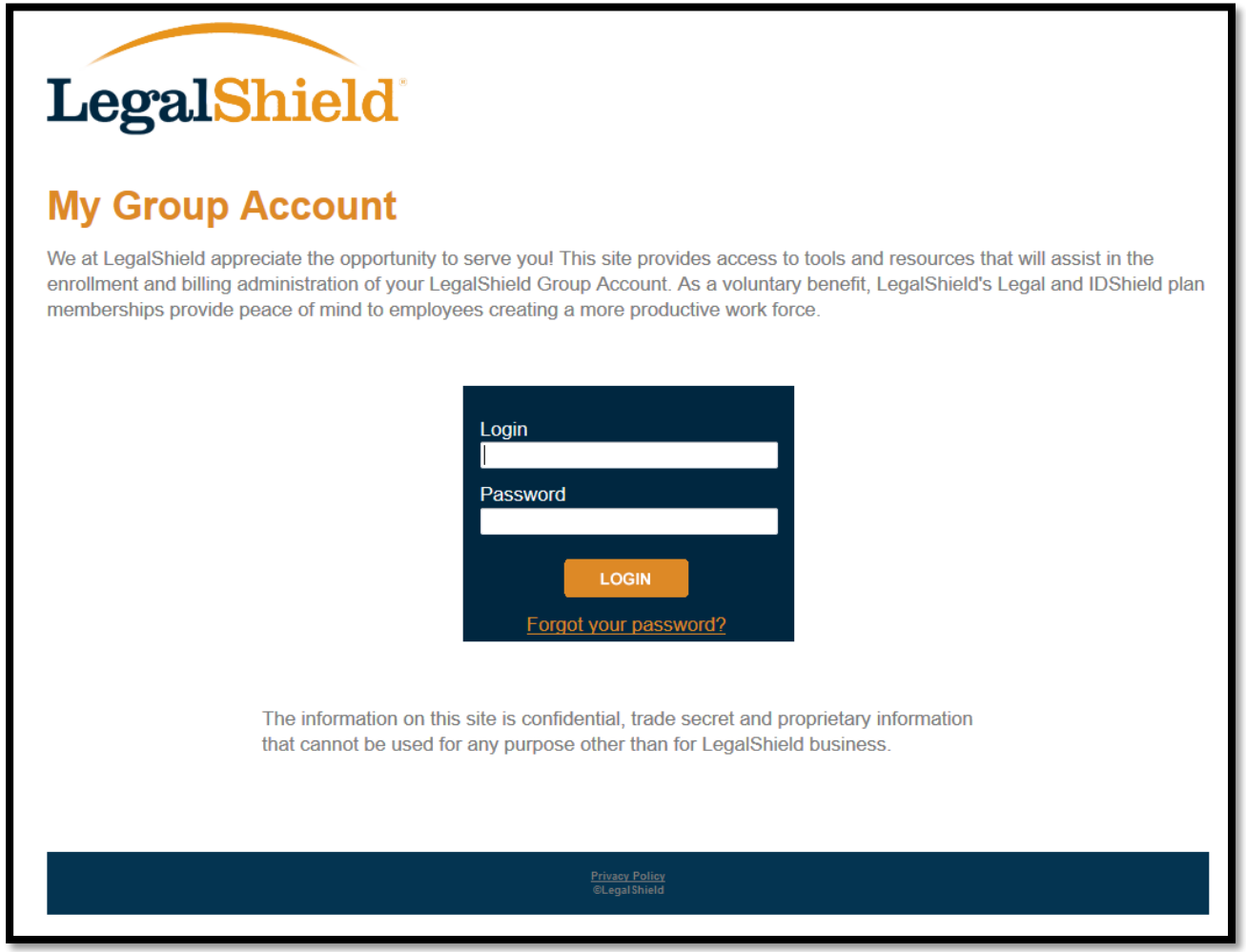
LegalShield®

BUSINESS SOLUTIONS

My Group Account

Managing Your LegalShield Group Account Online

Welcome to My Group Account



Login to My Group Account at:
https://w3.legalshield.com/grpbilling

My Group Account: Current Features

Account Information Page – Displays group name, group number, mailing and billing address of group, and user accounts with online access.

Billing Information Page – Provides access to billing invoices (PDF format) generated after your online setup date. Invoices will be provided online only with an email notification sent once the invoice is available for download. Pending payments are also listed here.

Enrollment Admin Page – Displays name, DOB, address, phone, email, and other plan information for all active and pending enrollments. An enrollment activity (*) indicator is placed next to new enrollments or any existing members who have had a recent plan amount update. An email notification is generated when enrollment activity occurs.

My Group Account: Current Features

Reporting Page – Generate an excel report of all member information on the group account with or without dependent information.

Resources Page – Access to PDF documents such as the LegalShield Group Benefit Guide, W9, member payment option forms, and My Group Account website information.

Contact Us Page – LegalShield Member Services Department contact information and the Group Billing or Group Resources Department contact information.

My Group Account: Online Access

SUMMARY

- Online access is provided through user accounts. The user accounts for each LegalShield group are defined as Plan Administrator, Authorized User, & LegalShield Associate.

USER ACCOUNTS

- **Plan Administrator** – The individual responsible for managing the group account (Payroll Director / HR Administrator). One Plan Administrator is setup for the group account.

- **Authorized Users** – Individuals are assigned by the Plan Administrator to help manage their group account. Multiple Authorized Users can be added to the group account for online access. (HR Reps, Broker, TPA, etc.)

- **LegalShield Associate** – The LegalShield servicing or designated sales agent for the group account.

User Account Setup

- Name, email, phone, phone ext, and fax can be stored for each user account.
- LegalShield Corporate Office will setup the Plan Administrator and LegalShield Associate for each group account.
- Name and email is required for setup. Email address provided is the user login name.
- Each new user account will receive a welcome email from LegalShield with a link to create their password and login to the My Group Account website.
- Upon the initial login, each new user account will be asked to agree to LegalShield's terms of service before entering the website.

Multi-User Online Access

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- A user account can be given access to multiple LegalShield group accounts online.
- The group accounts are linked through the email address (login name) provided.
- The User Account contact information is the same for all group accounts.
- After login, the user account is provided a list of all groups that have online access for.
- Group name, group number, effective date of group, # of employees, and last production date is displayed for all groups. Page allows user to select which group they wish to view.
- A switch group feature is available at the top of each group page to navigate between group accounts while staying logged in to the My Group Account website.

Multi-User Group List

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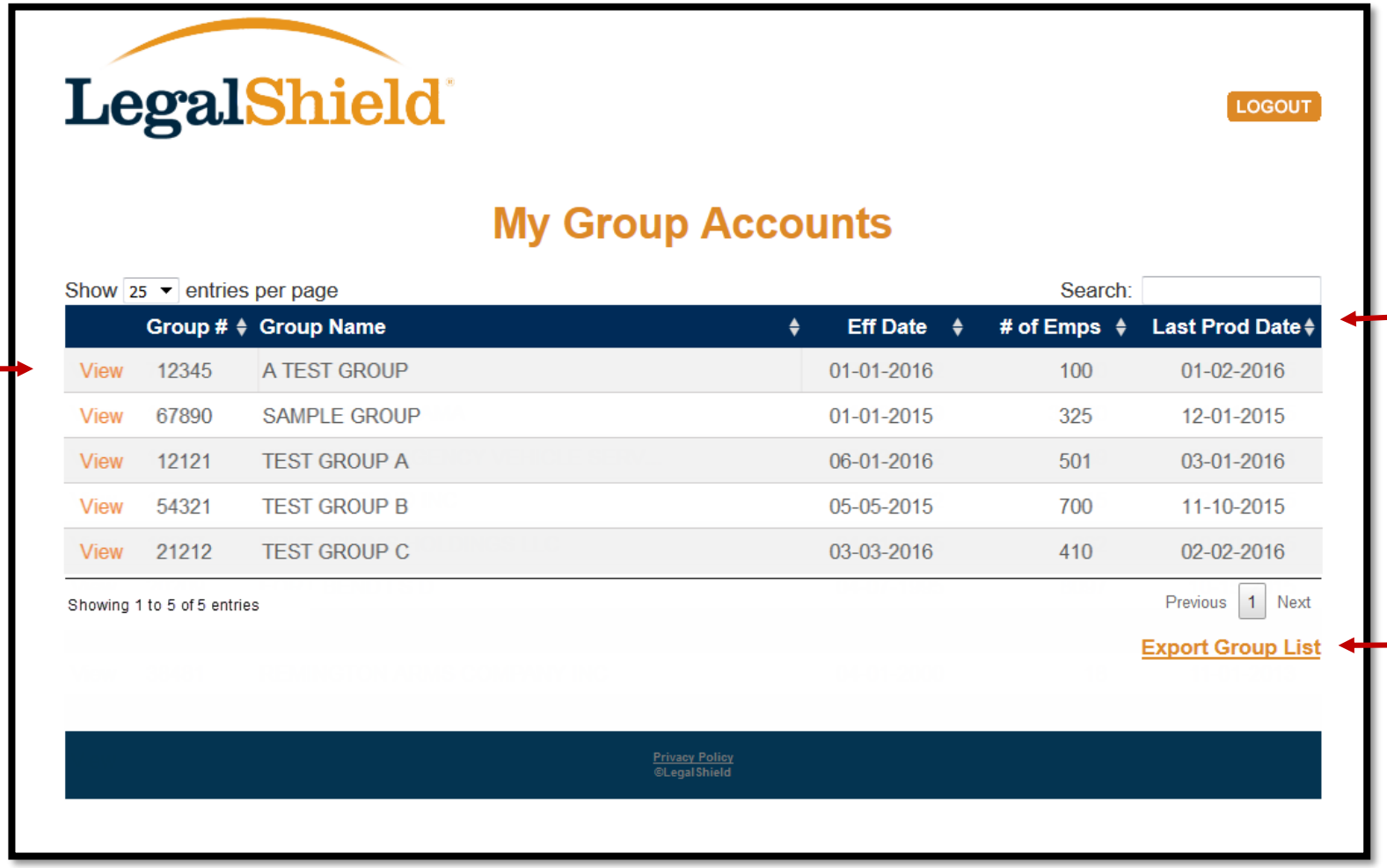
1. Click view to be taken to the selected group's account information page.



2. Use the search or sort columns feature to easily locate a group.

3. Select Export Group List to view listing of groups in excel file format.

Plan Administrator Online Access

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- User account is setup by LegalShield Corporate Office.
- Access to view all website pages and user accounts with online access.
- Update their user account information.
- Add or remove Authorized Users.
- Update name, phone, phone ext, and fax of Authorized User.
- Update mailing and billing address for group.
- Replace themselves as Plan Administrator.

Authorized User Online Access

- User account is setup by Plan Administrator online or LegalShield Corporate Office with Plan Administrator approval.
- Access to view all website pages and user accounts with online access.
- Update their user account information.
- Update mailing and billing address for group.

LegalShield Associate Online Access

- User account is setup by LegalShield Corporate Office.
- Access to view all website pages and user accounts with online access.
- Update their user account information (phone, phone ext, and fax).
- Update mailing and billing address for group.
- Listed as LegalShield Representative on website.

User Account Email Notifications

- **Welcome Email** – Generated when the user account has been setup on the group to receive online access. Email notification has link to setup password and login to the My Group Account website.

- **Password Reset Email** – Generated when a user account requests to reset their password. Email is sent to the user account's email on file. Email will include a link to click and create new password. Forgot password feature is available on the My Group Account login page.

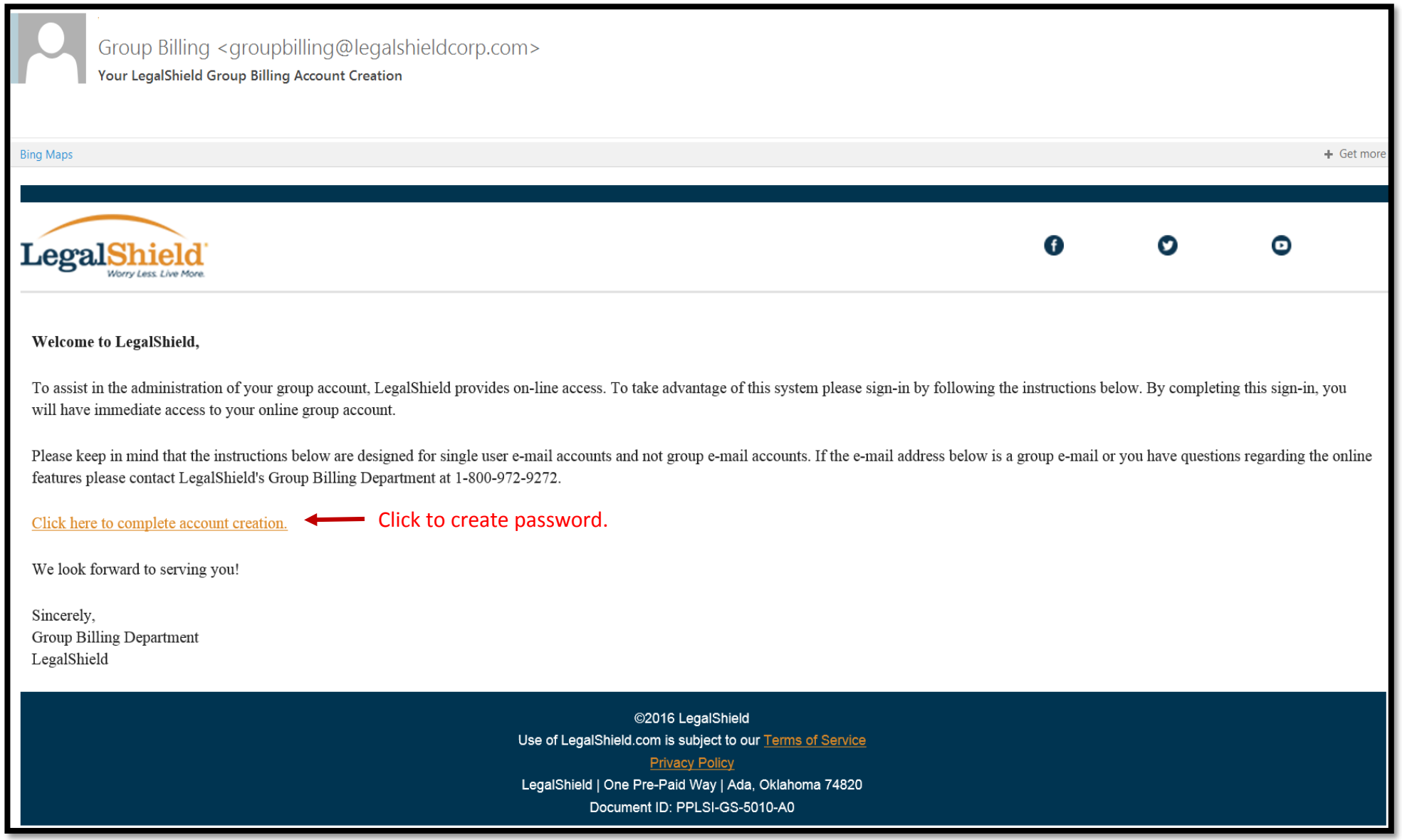
- **Multi-User Email** – Generated when a user account is setup with online access for multiple group accounts. Once the additional group accounts are added, the multi-user email is generated informing the user account that new groups have been added to their online access.

User Account Email Notifications

- **Billing Email –** Generated to all user accounts once the billing invoice is available for download on the website. An opt out link is available for the user account to opt out of future notifications.

- **Enrollment Activity Email –** Generated to all user accounts when new enrollment activity occurs on the group account. Email is sent once each day enrollment activity occurs. An opt out link is available for the user account to opt out of future notifications.

Welcome Email Sample



Group Billing <groupbilling@legalshieldcorp.com>

Your LegalShield Group Billing Account Creation

Bing Maps + Get more

LegalShield® Worry Less. Live More.

Welcome to LegalShield,

To assist in the administration of your group account, LegalShield provides on-line access. To take advantage of this system please sign-in by following the instructions below. By completing this sign-in, you will have immediate access to your online group account.

Please keep in mind that the instructions below are designed for single user e-mail accounts and not group e-mail accounts. If the e-mail address below is a group e-mail or you have questions regarding the online features please contact LegalShield's Group Billing Department at 1-800-972-9272.

Click here to complete account creation. ← Click to create password.

We look forward to serving you!

Sincerely,
Group Billing Department
LegalShield

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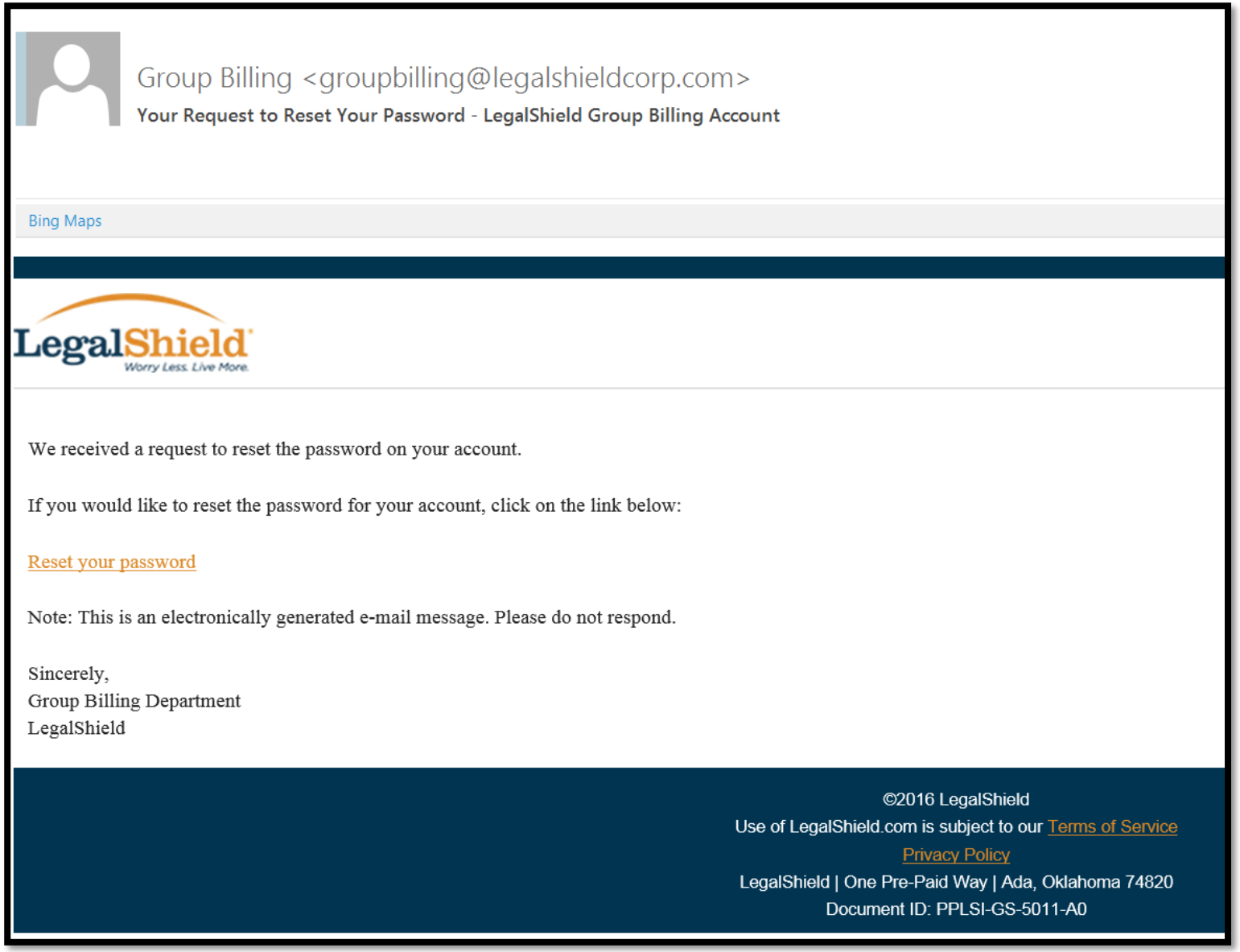
LegalShield | One Pre-Paid Way | Ada, Oklahoma 74820
Document ID: PPLSI-GS-5010-A0

Password Reset Email Sample

Click to create new password.



Group Billing <groupbilling@legalshieldcorp.com>

Your Request to Reset Your Password - LegalShield Group Billing Account

Bing Maps

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We received a request to reset the password on your account.

If you would like to reset the password for your account, click on the link below:

Reset your password

Note: This is an electronically generated e-mail message. Please do not respond.

Sincerely,
Group Billing Department
LegalShield

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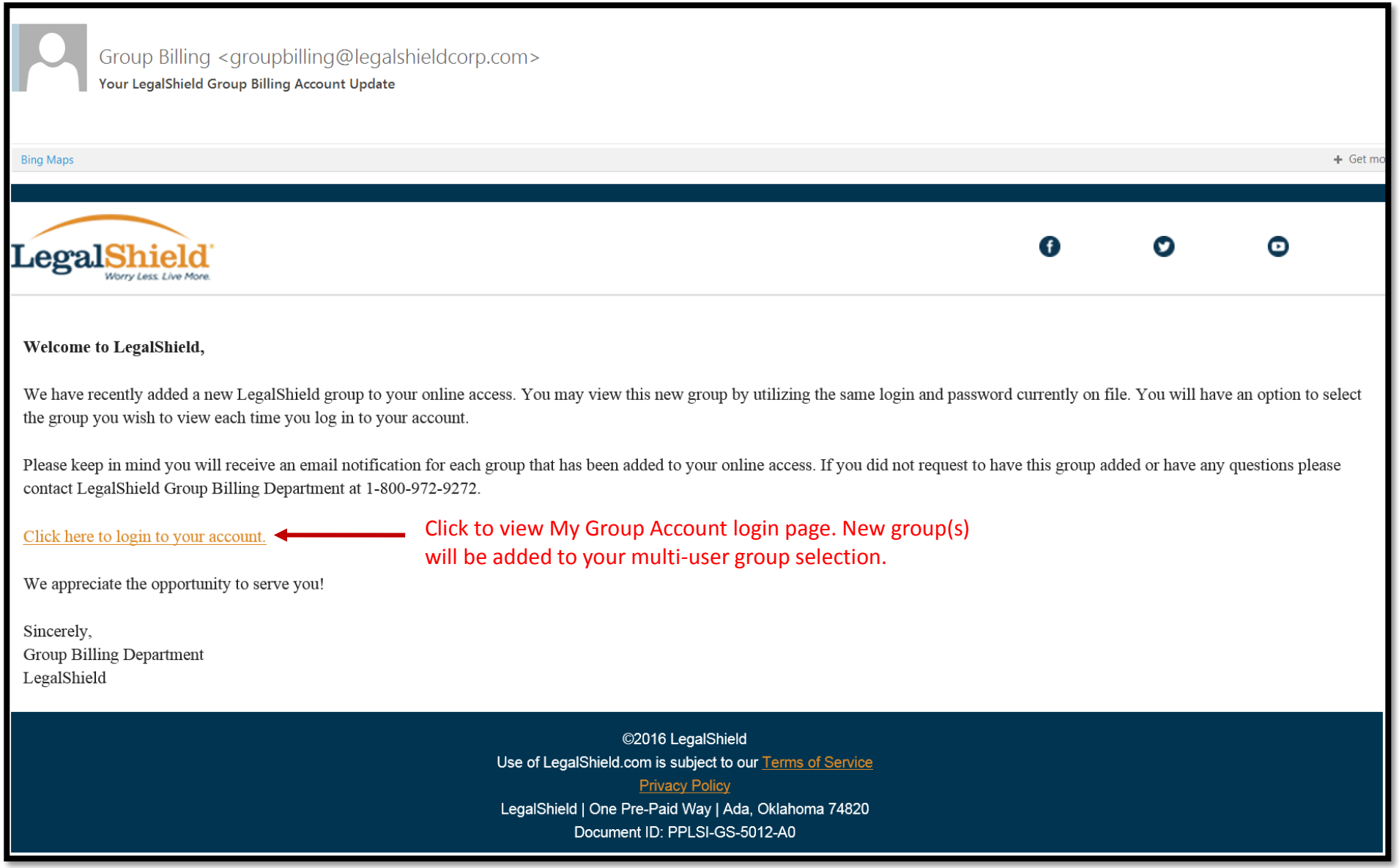
Document ID: PPLSI-GS-5011-A0

Multi-User Email Sample



Group Billing <groupbilling@legalshieldcorp.com>

Your LegalShield Group Billing Account Update

Bing Maps + Get mo

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Welcome to LegalShield,

We have recently added a new LegalShield group to your online access. You may view this new group by utilizing the same login and password currently on file. You will have an option to select the group you wish to view each time you log in to your account.

Please keep in mind you will receive an email notification for each group that has been added to your online access. If you did not request to have this group added or have any questions please contact LegalShield Group Billing Department at 1-800-972-9272.

Click here to login to your account.

Click to view My Group Account login page. New group(s) will be added to your multi-user group selection.

We appreciate the opportunity to serve you!

Sincerely,
Group Billing Department
LegalShield

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Document ID: PPLSI-GS-5012-A0

Billing Email Sample

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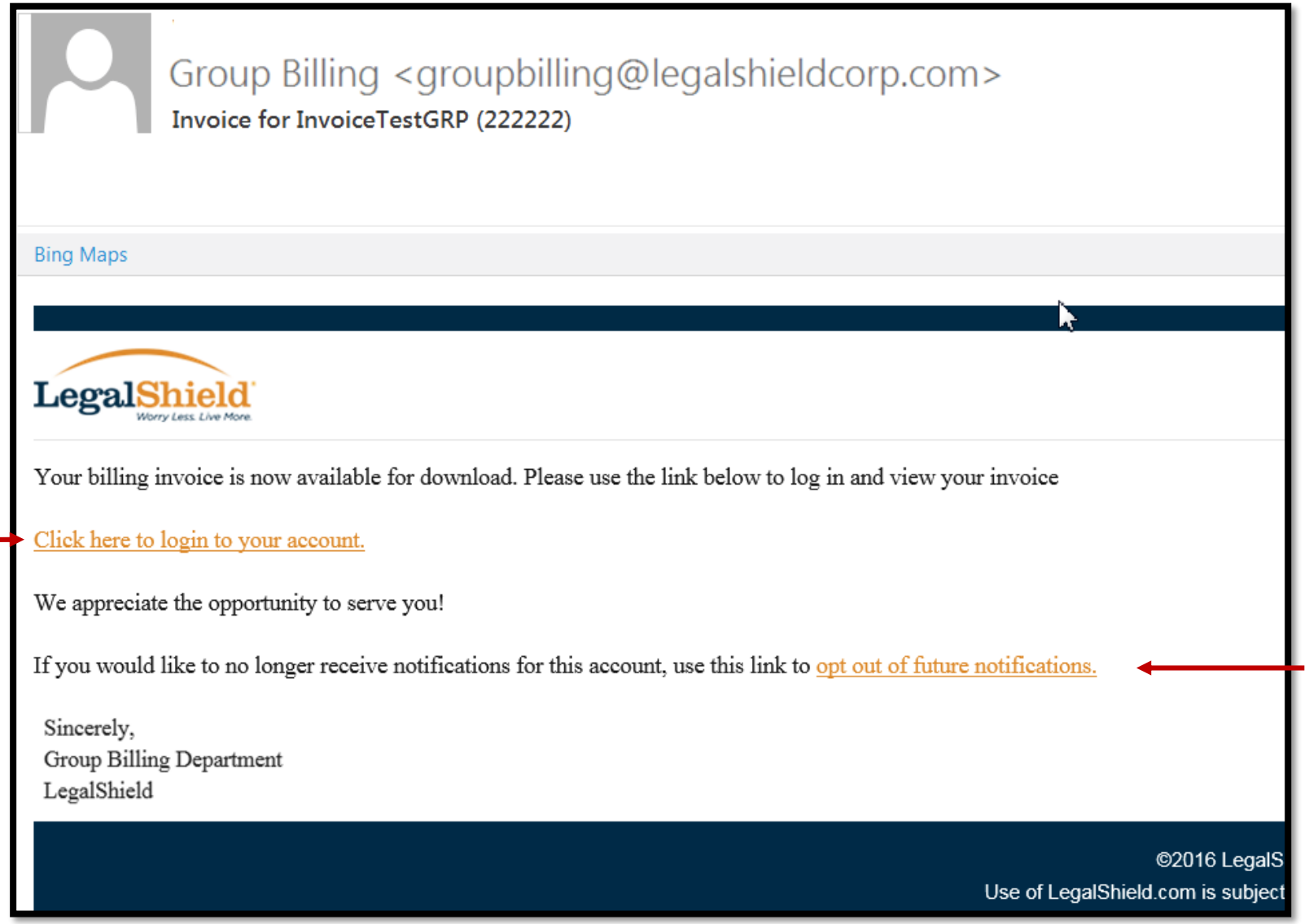
Click to view My Group Account login page.



Group Billing <groupbilling@legalshieldcorp.com>

Invoice for InvoiceTestGRP (222222)

Bing Maps

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Your billing invoice is now available for download. Please use the link below to log in and view your invoice

Click here to login to your account.

We appreciate the opportunity to serve you!

If you would like to no longer receive notifications for this account, use this link to opt out of future notifications.

Sincerely,
Group Billing Department
LegalShield

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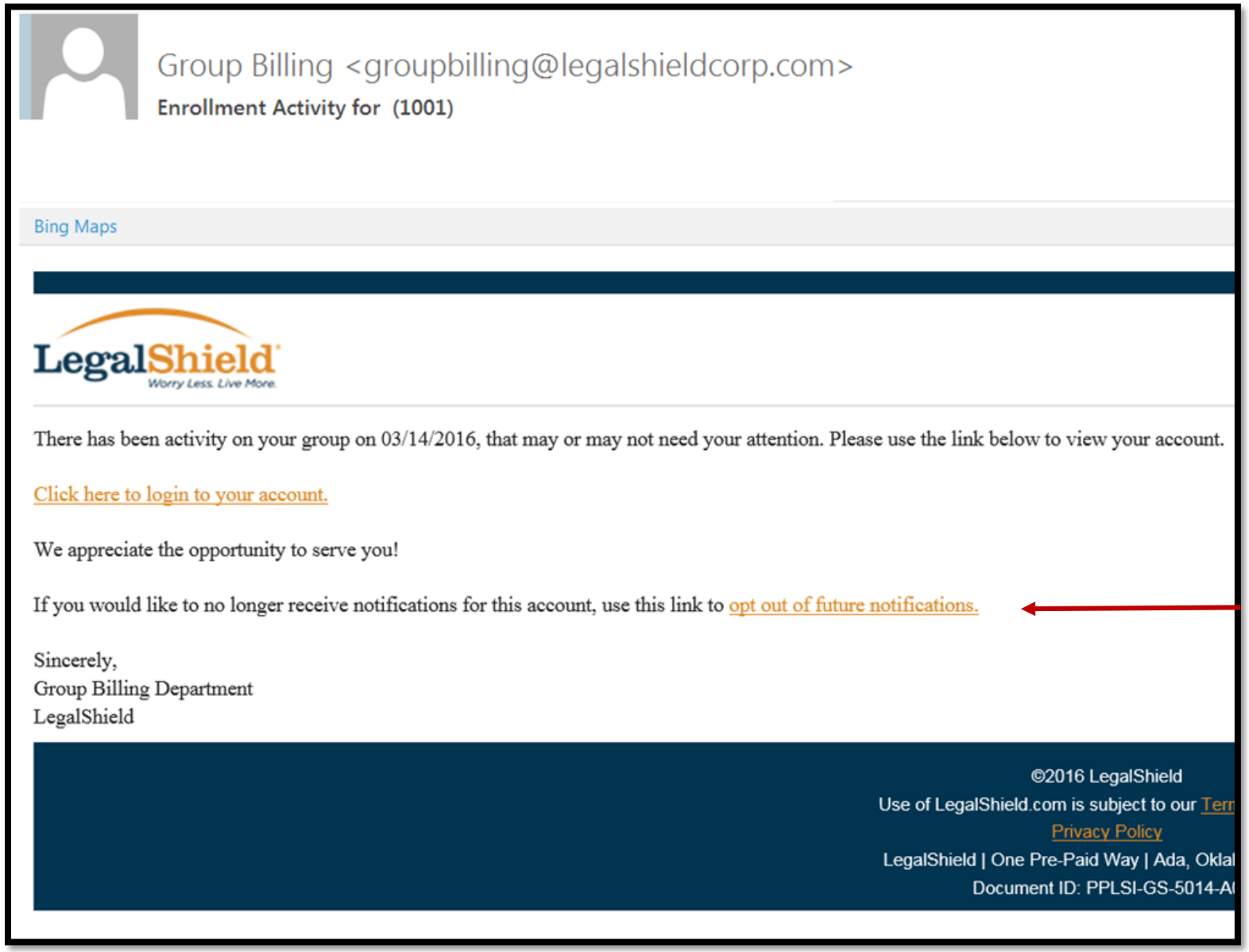
Use of LegalShield.com is subject

Click link to opt out of billing notifications for group.

Enrollment Activity Email Sample

Click to view My Group Account login page.



Group Billing <groupbilling@legalshieldcorp.com>

Enrollment Activity for (1001)

Bing Maps

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There has been activity on your group on 03/14/2016, that may or may not need your attention. Please use the link below to view your account.

Click here to login to your account.

We appreciate the opportunity to serve you!

If you would like to no longer receive notifications for this account, use this link to opt out of future notifications.

Sincerely,
Group Billing Department
LegalShield

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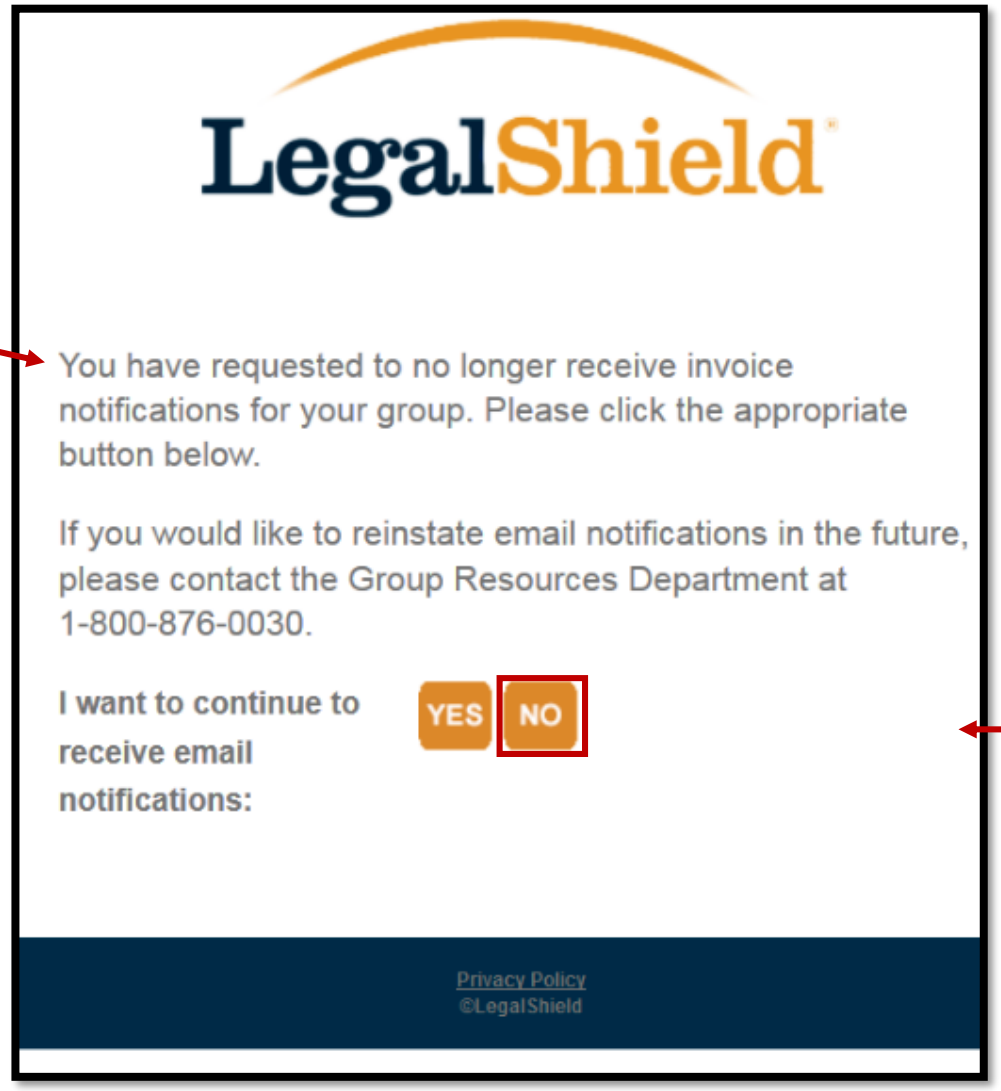
Document ID: PPLSI-GS-5014-A

Click link to opt out of billing notifications for group.

Opt Out Billing / Enrollment Email Notifications

If user account clicks the opt out email notifications link in the billing or enrollment email, they will be taken to this page.



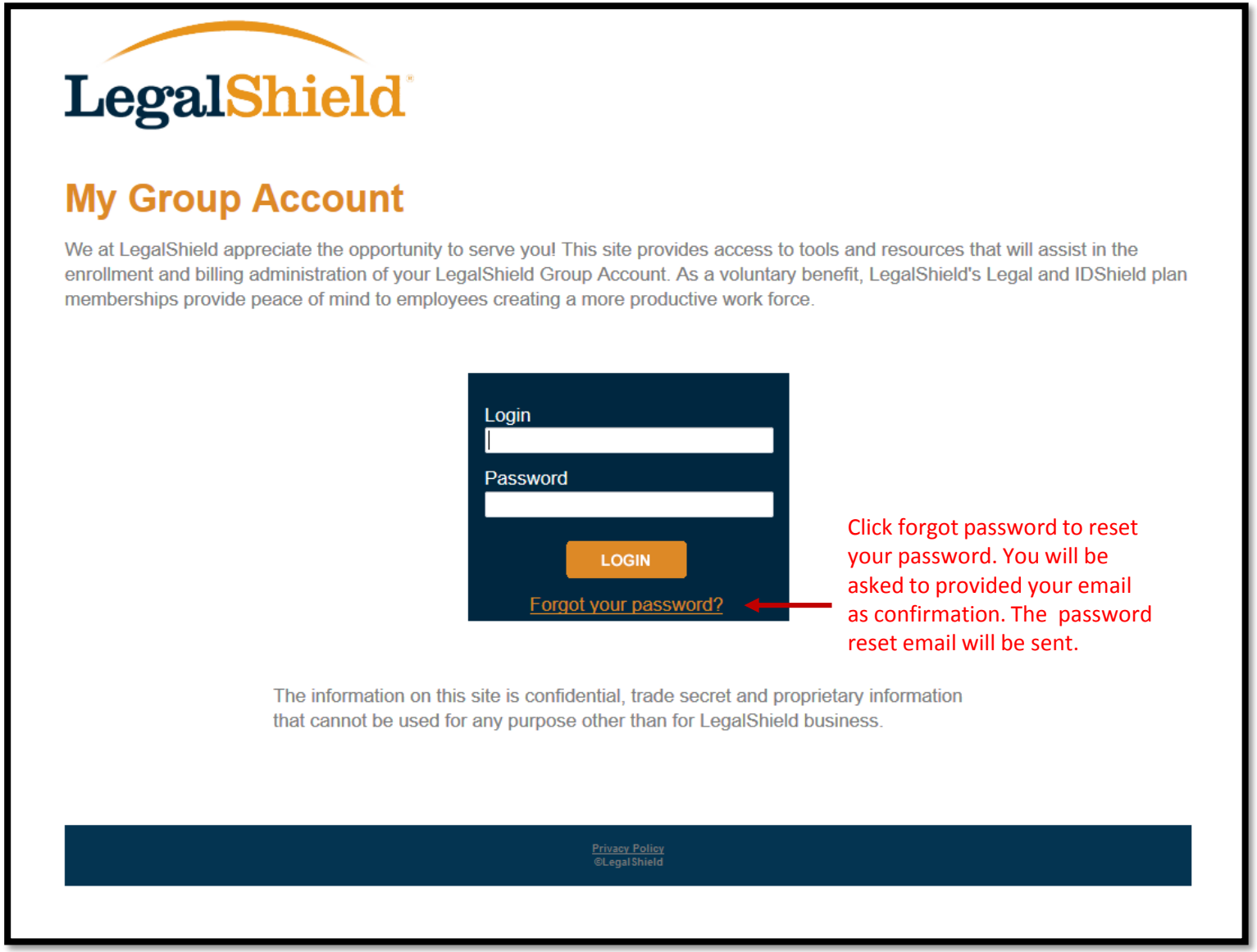
User account will click no to opt out of email notifications for group.

Terms of Service

Upon initial login, each new user account will agree to LegalShield's terms of service before entering the website.

Declining the terms of service will prevent the user from entering the website and will send them back to the login page.

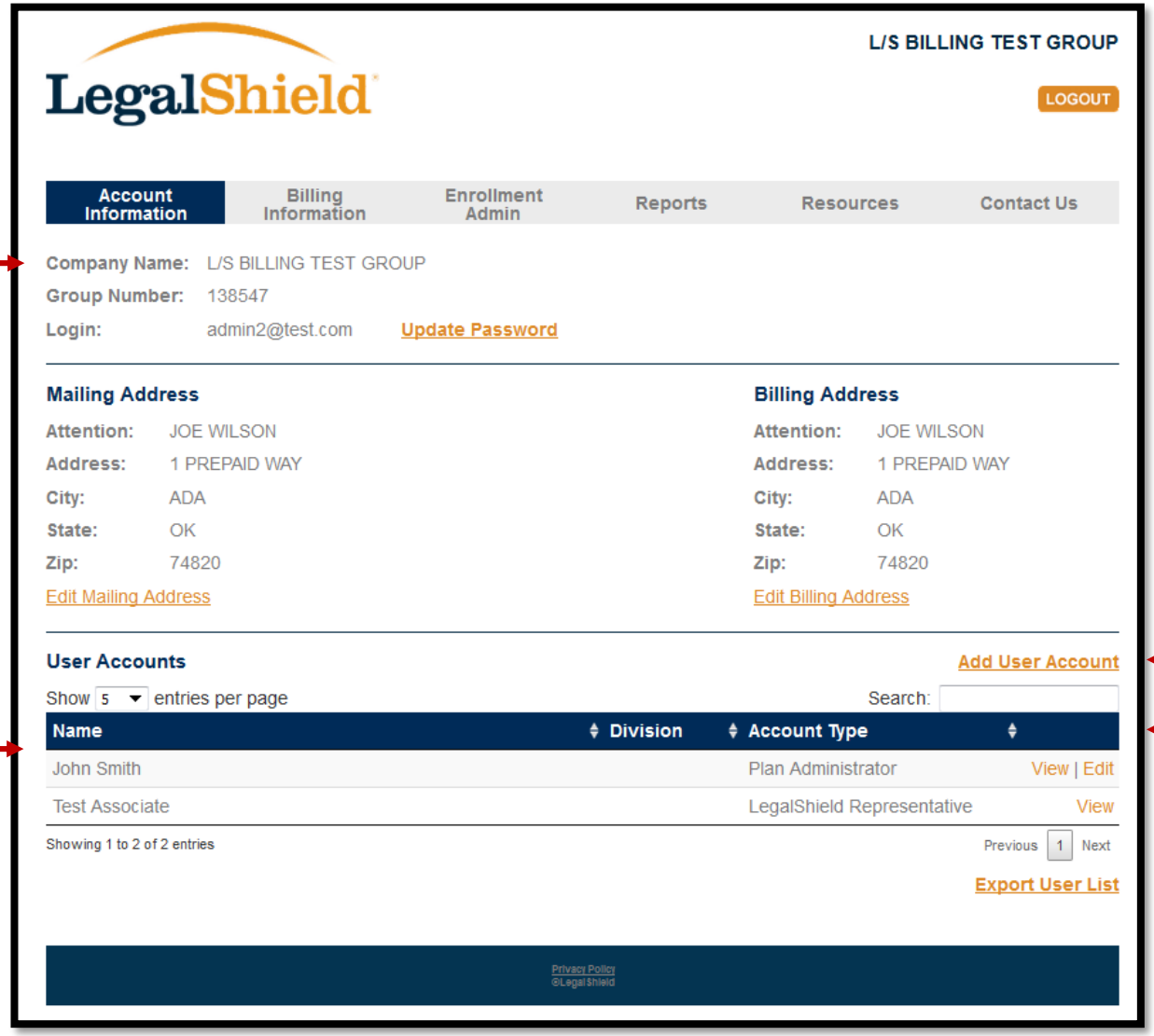
Forgot Password



Account Information Page

- LegalShield group number, group name, mailing and billing address, and all user accounts are viewable on this page.
- Update mailing and billing address by clicking the edit link below the address name.
- Plan Administrator can add Authorized Users by clicking the add user account link.
- Plan Administrators can update or remove Authorized Users by clicking the edit feature listed next to the user account name.
- User accounts can update their information using the edit feature.
- View all user account information in excel by clicking the export user list.

Account Information Page



1. Group Name

2. User Accounts with online access.

3. Plan Administrator can add Authorized Users.

4. Use the search or sort columns feature to easily locate a user account.

Billing Information Page

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- Invoices generated after your online setup date will be displayed here. Payments applied to invoice dates listed will show an amount paid with a processed date.
- Amount paid column is the check amount remitted for payment.
- Payments remitted to LegalShield should include a reconciled LegalShield invoice. If a self-billing account, please include the invoice date with your payment.
- Pending payments may be in the process of being applied to your group account or additional information may be needed to process. If pending payment is listed on the page for an extended period of time, please contact LegalShield to check status.
- View billing and payment history listed in an excel file by clicking export billing list.

Billing Information Page

1. Change the number of invoices that appear per page using the filter.

2. The most recent invoice are listed first. Click view to receive copy of invoice in PDF version.

3. Use the search or sort columns feature to easily locate an invoice.

4. Provide reference # when contacting LegalShield to see what further info. is needed to process payment.

Enrollment Admin Page

- The name, last 4 SSN, pay period amount, and pay period display for each member. Click view next to the member to see all enrollment information and plan(s) selected.
- An * indicator is placed next new enrollments, reinstatements, or members with plan amount changes to identify enrollment activity. Indicator last up to 30 days. The last plan amount update field in the member view displays date the enrollment activity occurred.
- Pay period amount will default to monthly if one is not provided or pay period is monthly.
- The last 4 SSN will only be viewable by Plan Administrator and Authorized User.
- If further information is needed to process a new enrollment (address, last 4 SSN, DOB, etc.), they are listed in the incomplete enrollment section with a reference number.

Enrollment Admin Page

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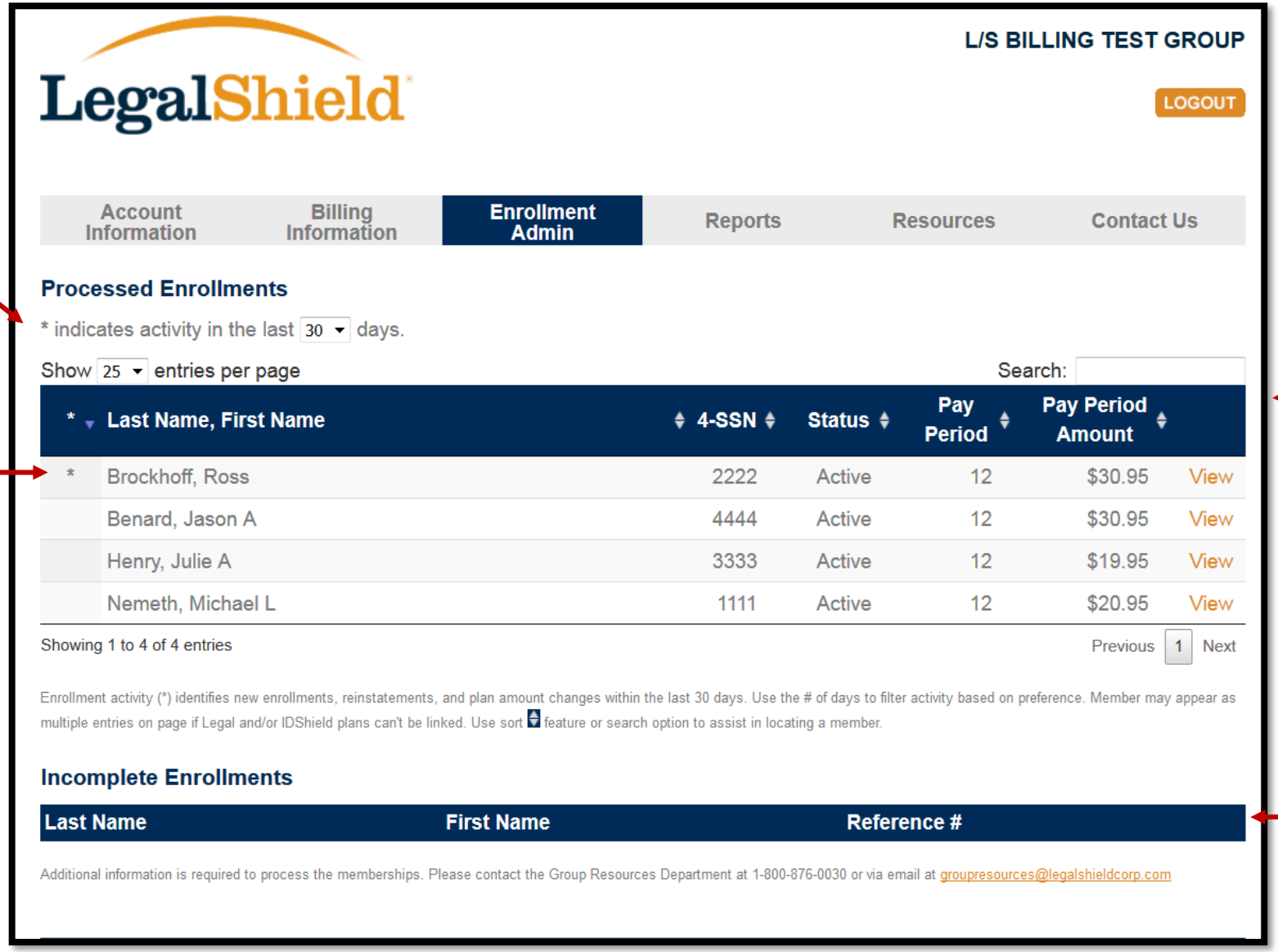
1. Change enrollment activity indicator to less than 30 days.

2. Page displays members with enrollment activity first in alpha order and remaining members second in alpha order.



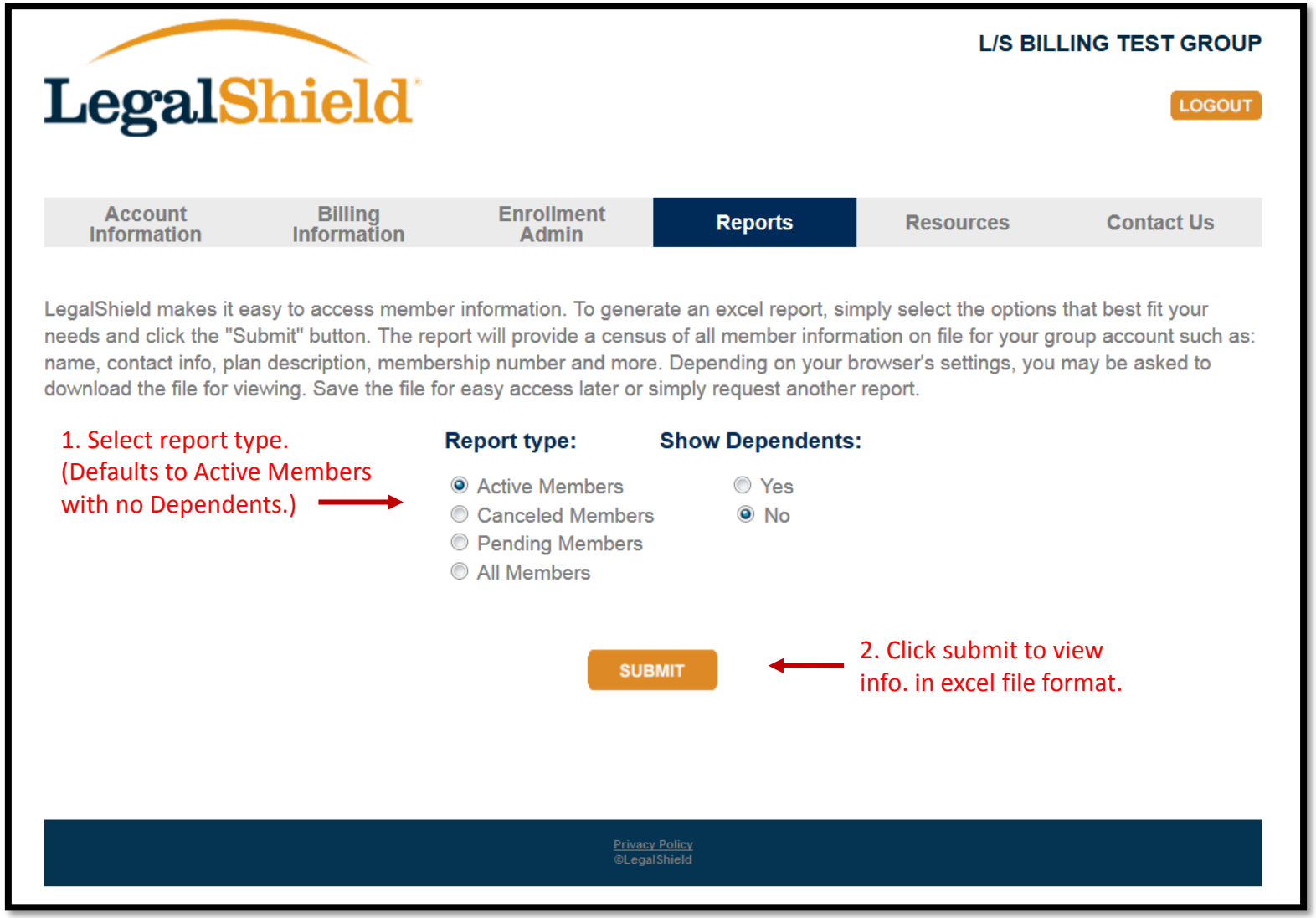
3. Use the search or sort columns feature to easily locate a member.

4. Provide reference # when contacting LegalShield to see what further info. is needed to process member.

Reports Page

- Member information such as last 4 SSN, name, address, DOB, phone numbers, email, employee id, plan premium(s) and plan information will be displayed on report by membership number.
- The report will sort by last name, first name, and membership number.
- Dependent information will display dependent name, relation, and DOB.
- The most current membership information is displayed at time of report generation.
- The Last 4 SSN displays for the Plan Administrator and Authorized User only.
- Pending report type refers to any new enrollments in a pending status.

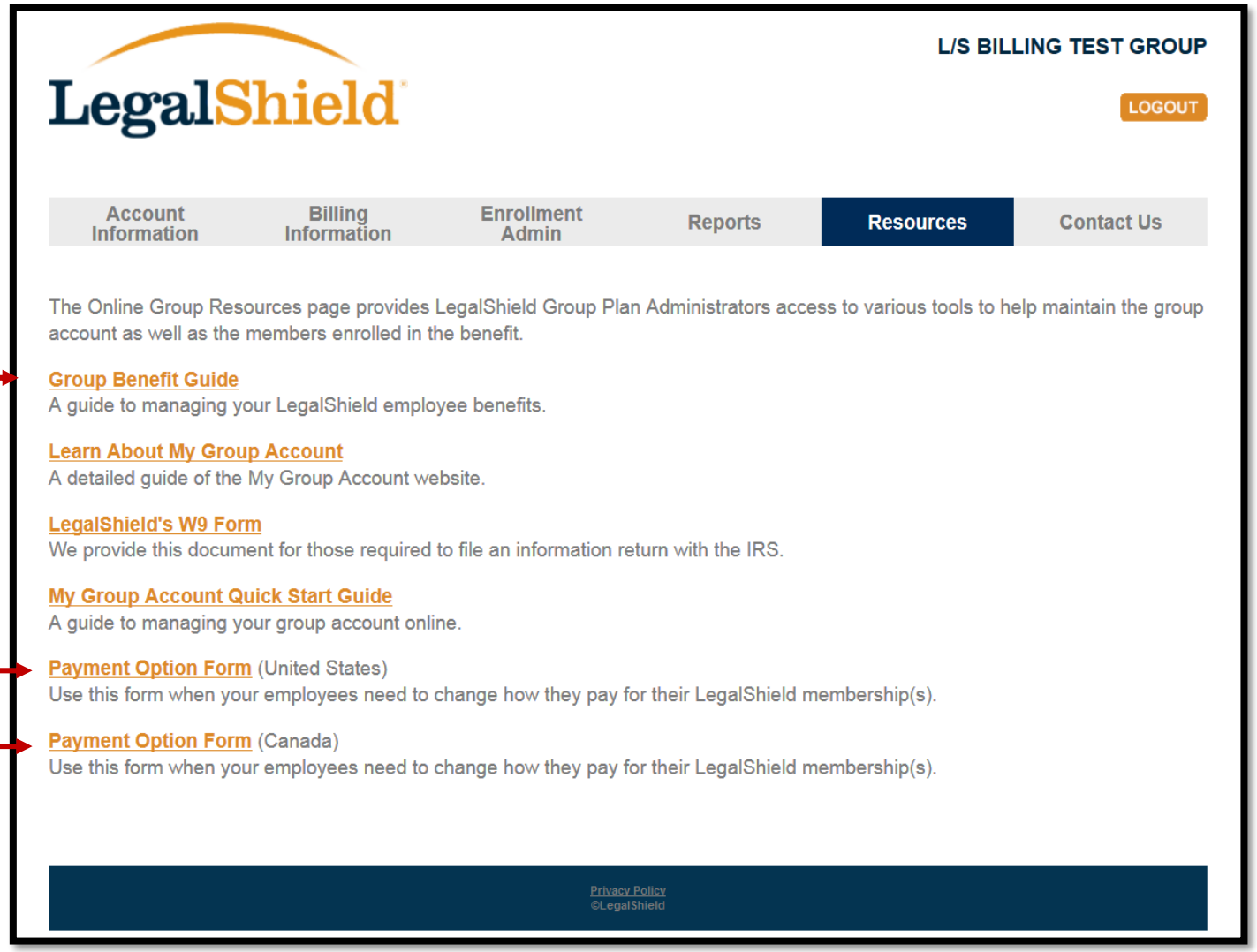
Reports Page



Resources Page

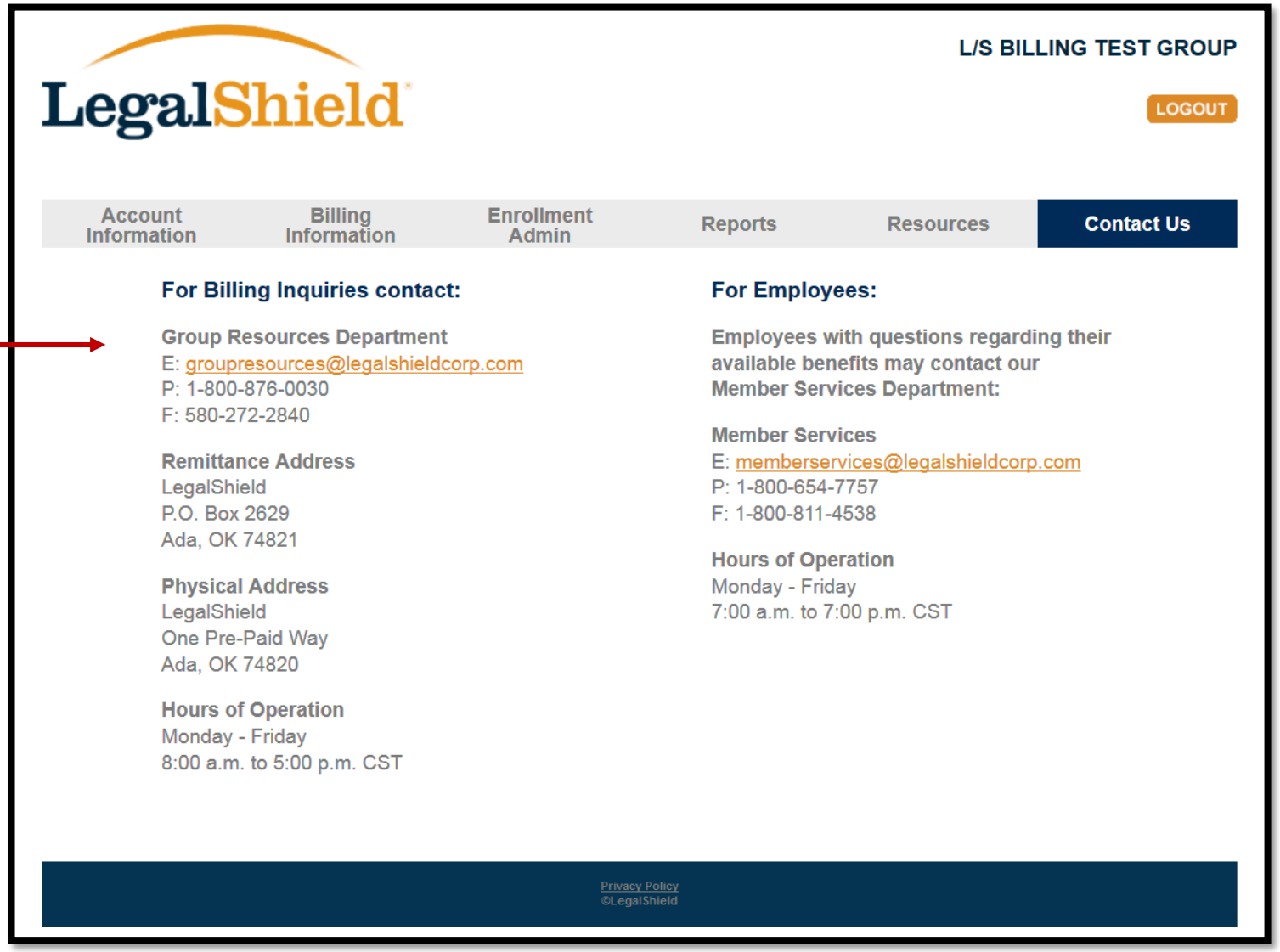
Click the underline name to view document. A description of the document is provided.

Form can be provided to members who are no longer being payroll deducted and want to keep plan through a self payment method.



Contact Us Page

Contact will display Group Billing or Group Resources Department. Use contact for any questions regarding the management of your group account.



THANK YOU