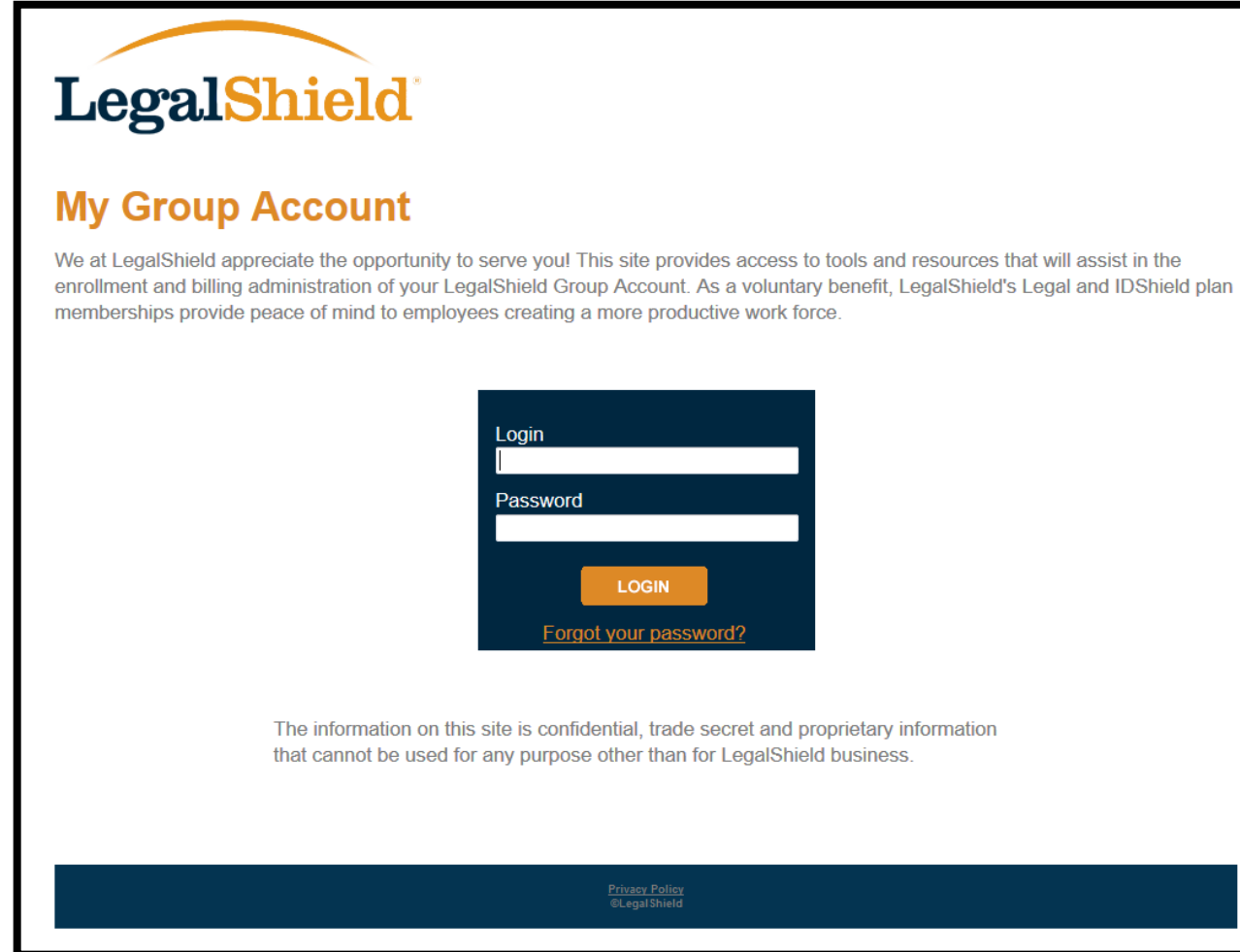




My Group Account

Managing Your LegalShield
Group Account Online

Welcome to My Group Account



The screenshot shows the LegalShield logo at the top left. Below it is the heading "My Group Account" in orange. A paragraph of text explains the purpose of the site. In the center is a dark blue login box with white text and input fields. At the bottom of the box is an orange "LOGIN" button and a link for "Forgot your password?". Below the login box is a disclaimer about confidentiality. At the very bottom is a dark blue footer bar with a link to the "Privacy Policy" and the copyright notice "©LegalShield".

LegalShield®

My Group Account

We at LegalShield appreciate the opportunity to serve you! This site provides access to tools and resources that will assist in the enrollment and billing administration of your LegalShield Group Account. As a voluntary benefit, LegalShield's Legal and IDShield plan memberships provide peace of mind to employees creating a more productive work force.

Login

Password

LOGIN

[Forgot your password?](#)

The information on this site is confidential, trade secret and proprietary information that cannot be used for any purpose other than for LegalShield business.

[Privacy Policy](#)
©LegalShield

Login to My Group Account at: [**w3.legalshield.com/grpbilling/init**](https://w3.legalshield.com/grpbilling/init)

Quick Navigation Links

- **Current Website Features**
- **User Accounts with Online Access**
- **User Account Setup**
- **Forgot Password**
- **Multi-User Accounts**
- **Account Information Page**
- **Billing Information Page**
- **Enrollment Admin Page**
- **Enroll New Members**
- **Membership Updates**
- **Membership Cancellations**
- **Reports Page**
- **Resources Page**
- **Contact Us Page**

**** Click on any of the items listed above to quickly navigate to that section. To return to this page, simply click the LegalShield Business Solutions logo in the upper right hand corner of each page. ****

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 – View enrollment information for all active and pending members. Process membership updates and cancellations as they occur. An enroll new member option is available to complete an online application for new enrollments when applicable. An email notification is generated when enrollment activity occurs.

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.

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 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 Users.
- Edit group address, process membership updates and cancellations, and enroll new members.
- Replace themselves as Plan Administrator.

- 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.
- Edit group address, process membership updates and cancellations, and enroll new members.

- 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).
- Edit group address, process membership updates and cancellations, and enroll new members.
- Listed as LegalShield Representative on website.

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


User Account Setup: Welcome Email






Group Billing <groupbilling@legalshieldcorp.com>
Your LegalShield Group Billing Account Creation

Bing Maps

Get 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 link to be taken to the password creation page.

We look forward to serving you!

Sincerely,
Group Billing Department
LegalShield

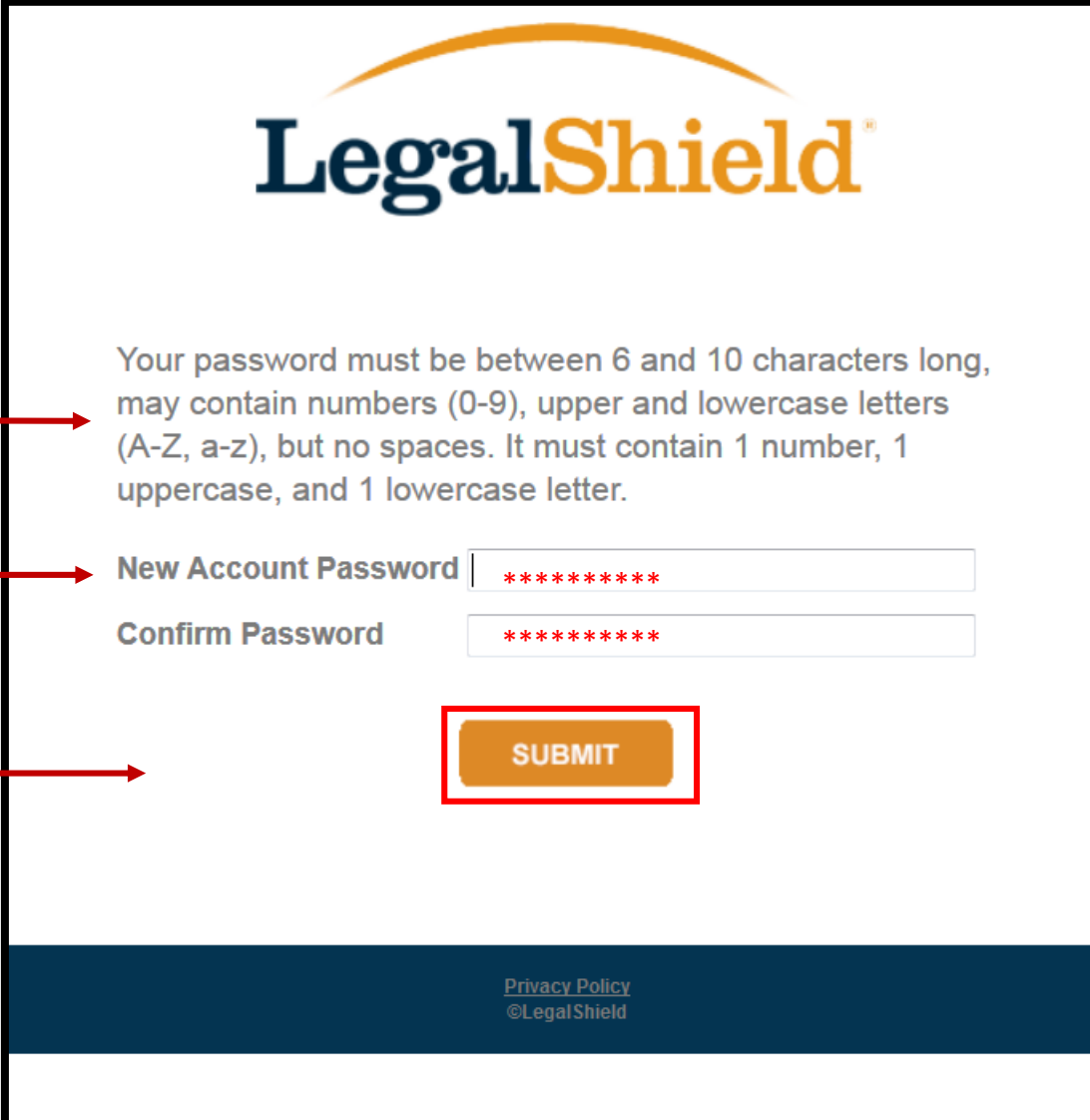
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[Privacy Policy](#)

LegalShield | One Pre-Paid Way | Ada, Oklahoma 74820

Document ID: PPLSI-GS-5010-A0

User Account Setup: Password Creation



The image shows a web form for creating a new account password. At the top is the LegalShield logo. Below it is a text box explaining password requirements: 'Your password must be between 6 and 10 characters long, may contain numbers (0-9), upper and lowercase letters (A-Z, a-z), but no spaces. It must contain 1 number, 1 uppercase, and 1 lowercase letter.' Below this are two input fields: 'New Account Password' and 'Confirm Password', both containing eight asterisks. A red box highlights the 'SUBMIT' button. At the bottom of the form is a dark blue footer bar with links for 'Privacy Policy' and '©LegalShield'.

Use password criteria. →

Enter password twice. →

Click submit to be taken to the My Group Account login page to login with password. →

LegalShield[®]

Your password must be between 6 and 10 characters long, may contain numbers (0-9), upper and lowercase letters (A-Z, a-z), but no spaces. It must contain 1 number, 1 uppercase, and 1 lowercase letter.

New Account Password |

Confirm Password |

SUBMIT

[Privacy Policy](#)
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My Group Account

We at LegalShield appreciate the opportunity to serve you! This site provides access to tools and resources that will assist in the enrollment and billing administration of your LegalShield Group Account. As a voluntary benefit, LegalShield's Legal and IDShield plan memberships provide peace of mind to employees creating a more productive work force.

Enter email and password
before clicking login →

Login

Password

LOGIN

[Forgot your password?](#)

The information on this site is confidential, trade secret and proprietary information that cannot be used for any purpose other than for LegalShield business.

User Account Setup: Terms of Service

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



The image shows a screenshot of the LegalShield Terms of Service screen. At the top is the LegalShield logo. Below it, the text reads: "I agree that the information on this site is confidential, trade secret and proprietary information that cannot be used for any purpose other than for LegalShield business." Underneath this text is the statement "I acknowledge the above terms" followed by two buttons: "ACCEPT" and "DECLINE". The "ACCEPT" button is highlighted with a red border. At the bottom of the screen, there is a dark blue footer bar containing the text "Privacy Policy" and "©LegalShield".

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



My Group Account

We at LegalShield appreciate the opportunity to serve you! This site provides access to tools and resources that will assist in the enrollment and billing administration of your LegalShield Group Account. As a voluntary benefit, LegalShield's Legal and IDShield plan memberships provide peace of mind to employees creating a more productive work force.

Login

Password

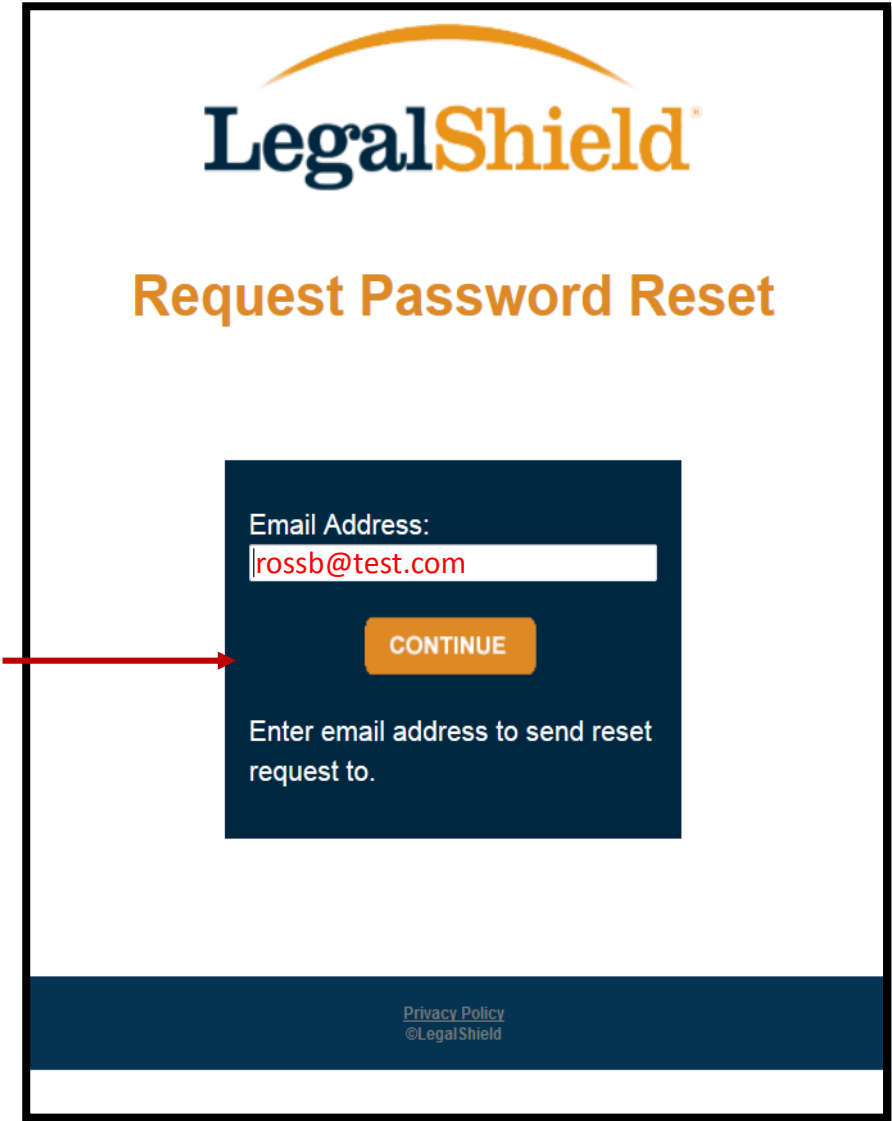
LOGIN

[Forgot your password?](#)

Click forgot password on login page to begin the password reset process.

The information on this site is confidential, trade secret and proprietary information that cannot be used for any purpose other than for LegalShield business.

Enter your email address (login name) and select continue to receive the password reset email.

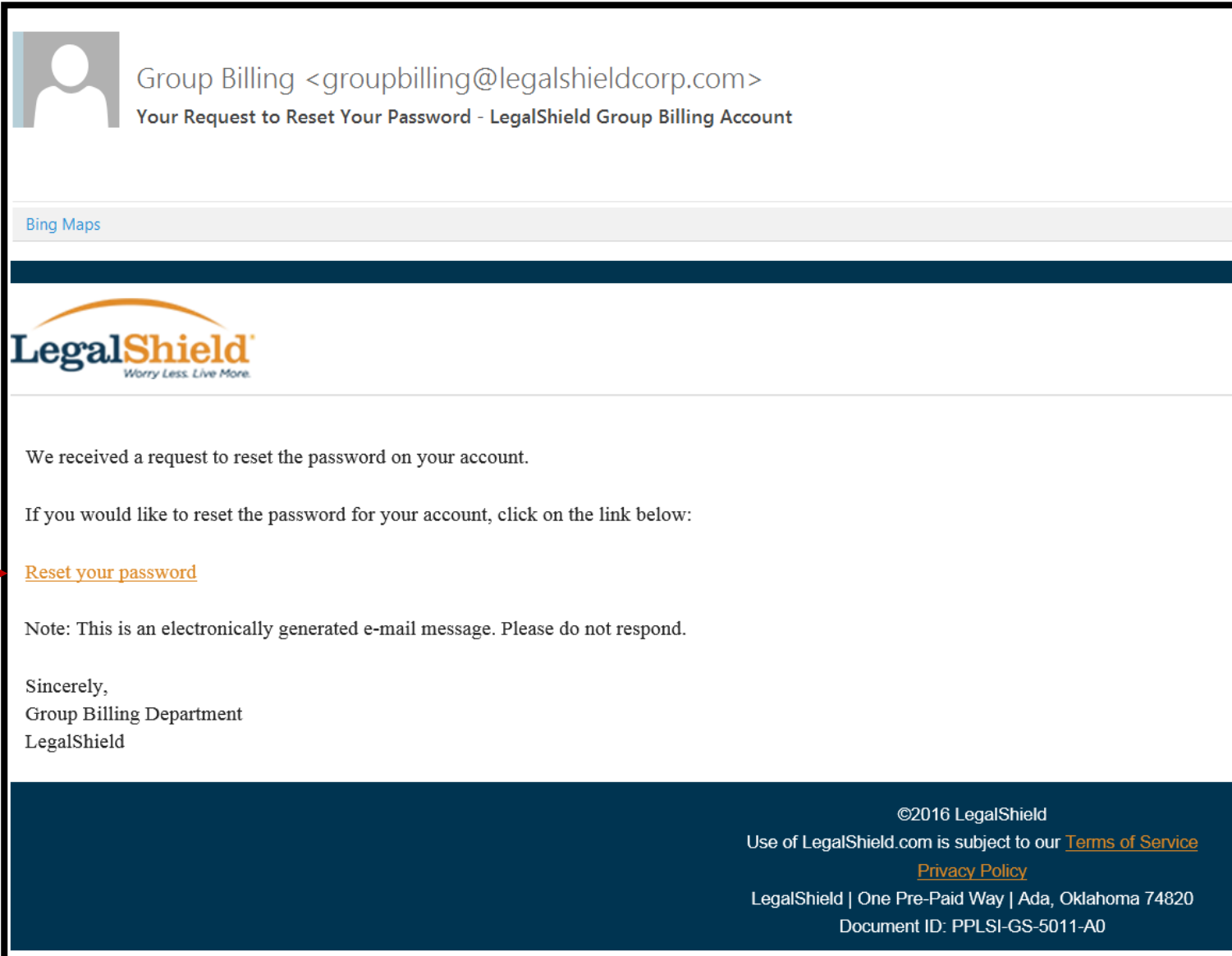


The form is titled "Request Password Reset" and features the LegalShield logo at the top. It contains a dark blue box with the following elements:

- Email Address:** A label above a text input field containing "rossb@test.com".
- CONTINUE**: An orange button.
- Enter email address to send reset request to.**: A label below the input field.

At the bottom of the form, there is a dark blue footer bar with the text "Privacy Policy" and "©LegalShield".

Forgot Password: Password Reset Email



Forgot Password: Create New Password

The screenshot shows the LegalShield 'Forgot Password: Create New Password' form. It includes the LegalShield logo at the top, followed by password criteria text. Below this are two input fields for 'New Account Password' and 'Confirm Password', both containing masked text (asterisks). A red box highlights the 'SUBMIT' button. At the bottom, there is a dark blue footer bar with links for 'Privacy Policy' and '©LegalShield'.

LegalShield[®]

Your password must be between 6 and 10 characters long, may contain numbers (0-9), upper and lowercase letters (A-Z, a-z), but no spaces. It must contain 1 number, 1 uppercase, and 1 lowercase letter.

Use password criteria. →


Enter password twice. → **New Account Password** [*****]

Confirm Password [*****]

Click submit to be taken to the My Group Account login page and login with new password. → **SUBMIT**


[Privacy Policy](#)
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- If a user account is given access to multiple LegalShield group accounts online, they are given multi-user access. This allows the user to view all group accounts through one login.
- 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.
- A switch group feature allows the user to navigate between group accounts while staying logged in to the My Group Account website.
- An email notification is generated to the user account as new groups are added to their online access.



Group Billing <groupbilling@legalshieldcorp.com>
Your LegalShield Group Billing Account Update

[Bing Maps](#)+ Get mo





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 link to be taken to the My Group Account login page.
New group(s) will appear in your multi-user group list.**

We appreciate the opportunity to serve you!

Sincerely,
Group Billing Department
LegalShield

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[Privacy Policy](#)
LegalShield | One Pre-Paid Way | Ada, Oklahoma 74820
Document ID: PPLSI-GS-5012-A0

Multi-User Group List (after login)



LOGOUT

My Group Accounts

Show 25 entries per page

Search:

	Group #	Group Name	Eff Date	# of Emps	Last Prod Date
View	12345	A TEST GROUP	01-01-2016	100	01-02-2016
View	67890	SAMPLE GROUP	01-01-2015	325	12-01-2015
View	12121	TEST GROUP A	06-01-2016	501	03-01-2016
View	54321	TEST GROUP B	05-05-2015	700	11-10-2015
View	21212	TEST GROUP C	03-03-2016	410	02-02-2016

Showing 1 to 5 of 5 entries

Previous

1

Next

[Export Group List](#)

Privacy Policy

@LegalShield

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.

- 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 and number.

2. Click to edit mailing or billing address.

2. User Accounts with online access.



L/S BILLING TEST GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

Company Name: L/S BILLING TEST GROUP

Group Number: 138547

Login: johnsmith@test.com

Update Password

Mailing Address

Attention: JOHN SMITH

Address: 1 PREPAID WAY

City: ADA

State: OK

Zip: 74820

Edit Mailing Address

Billing Address

Attention: JOHN SMITH

Address: PO BOX 2840

City: ADA

State: OK

Zip: 74820

Edit Billing Address

User Accounts

Add User Account

Show 5 entries per page

Search:

Name	Division	Account Type	
John Smith		Plan Administrator	View Edit
Test Associate		LegalShield Representative	View
John Doe		Authorized User	View Edit

Showing 1 to 3 of 3 entries

Previous 1 Next

Export User List

Privacy Policy

@LegalShield

- 3. Plan Administrator can add Authorized Users.
- 4. Use the search or sort columns feature to easily locate a user account.

Plan Admin: Add Authorized User(s)



L/S BILLING TEST GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

Add User Account

* Name:

Mark Smith

1. Plan Administrator will enter Auth. User name.

Phone Number:

Ext:

Fax Number:

* Email:

marksmith@test.com

2. Plan Administrator will enter Auth. User email address.

* Account Type:

☐ Plan Administrator

☒ Authorized User

3. Plan Administrator will select Auth. User option.

* denotes required field

SUBMIT

4. Once submitted, Auth. User will receive welcome email.

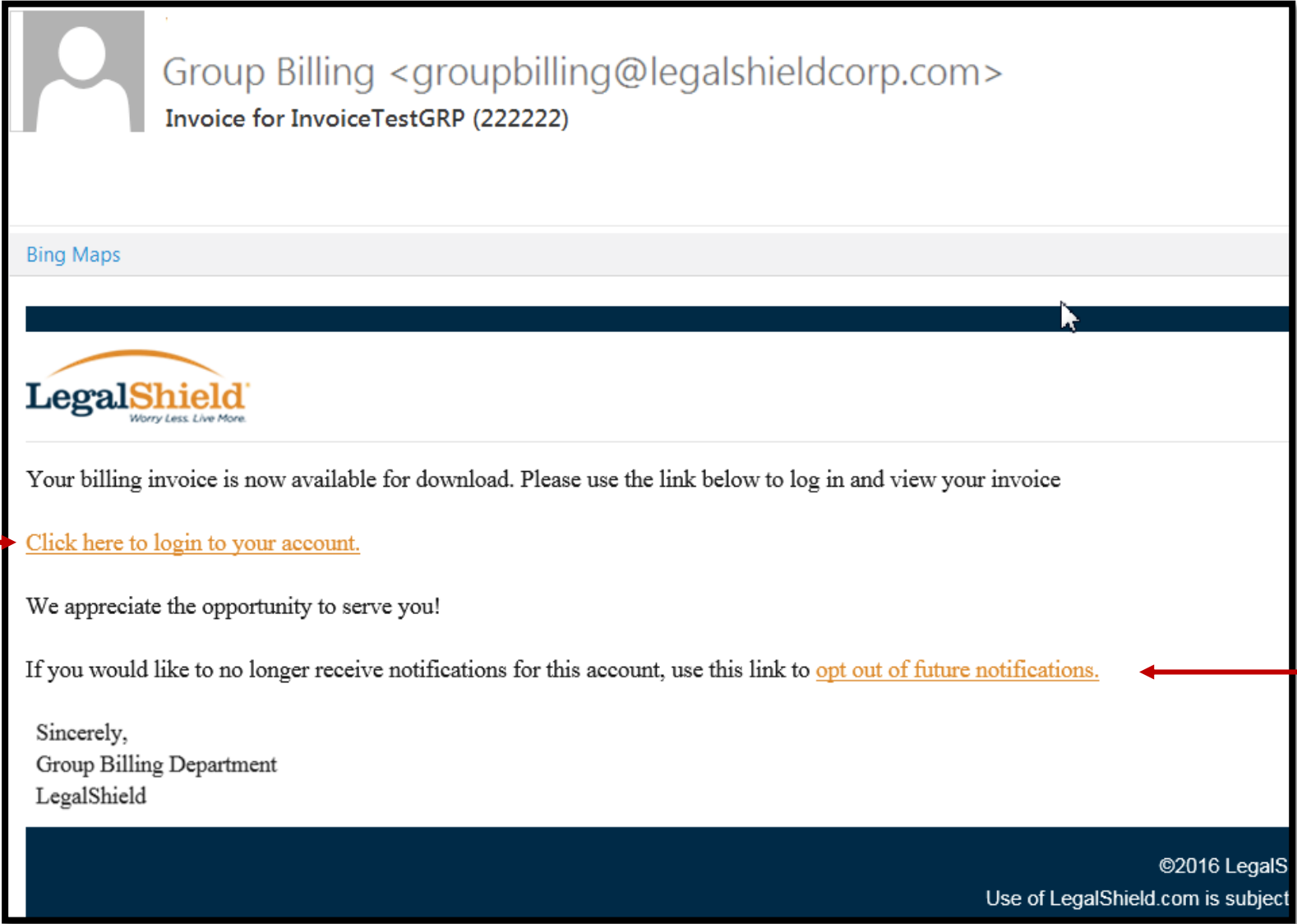
Only one Plan Administrator can be listed for the account. Adding a Plan Administrator will replace the current Plan Administrator on file. All new users will receive an email invitation to initiate their account log in.

Privacy Policy

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- Billing invoices generated after your online setup date will be displayed here. Invoices are provided online only. Payments applied to invoice dates will show an amount paid with a processed date. Amount paid column is the check amount remitted to LegalShield.
- Payments remitted to LegalShield should include a reconciled LegalShield invoice. If a self-billing account, please include the LegalShield 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.
- An billing email notification is generated to all user accounts when each billing invoice is available for download on the website. An opt out feature is provided in the email notification if you prefer not to receive the notification.

Billing Invoice Email Notification




Click link to view My Group Account login page.

Click link to opt out of billing notifications for group.

Opt Out: Billing Invoice Email Notifications

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





You have requested to no longer receive invoice notifications for your group. Please click the appropriate button below.

If you would like to reinstate email notifications in the future, please contact the Group Resources Department at 1-800-876-0030.

I want to continue to receive email notifications:


[Privacy Policy](#)
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User account will click no to opt out of email notifications for group.

Billing Information Page

- 1. Change the number of invoices that appear per page using the filter.
- 2. The most recent invoice is listed first. Click to view copy of the invoice in a PDF version.



L/S BILLING TEST GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

Invoices

Show 25 entries per page

Search:

	Invoice Date	Invoice Amount	Division	Amount Paid	Processed Date
View	2016-03-05	\$105.80			
View	2016-02-05	\$105.80			
View	2016-01-05	\$105.80		\$108.50	01-21-2016

Showing 1 to 3 of 3 entries

Previous 1 Next

[Export Billing List](#)

Pending Payments

Reference Number	Amount Paid
20160301-689892-05	\$108.50

Pending payments listed may require additional information to process.

Please allow 24-48 business hours to process all pending payments received with the proper documentation. Please contact the Group Resources Department 1-800-876-0030 or groupresources@legalshieldcorp.com with any questions.


Privacy Policy

©LegalShield

- 3. Use the search or sort columns feature to easily locate an invoice.
- 4. Click export billing list to view billing history in an excel file format.
- 5. Provide reference # when contacting LegalShield to see what further info. is needed to process payment.


- The name, last 4 SSN, pay period amount, and pay period display for active and pending members. Click the view option next to the member to see all enrollment information. The last 4 SSN is only viewable for the Plan Administrator and Authorized User.
- An * indicator is placed next new enrollments, reinstatements, or members with plan amount changes to identify enrollment activity within the last 30 days.
- An enrollment activity email notification is generated to all user accounts when enrollment activity occurs. An opt out feature is provided in the email notification if you prefer not to receive the notification
- Membership updates and cancellations are available under the member view option.
- Enroll new members option is available for user accounts to submit new enrollments when applicable.
- If further information is needed to process a new enrollment (address, last 4 SSN, DOB, etc.), the new enrollment will be listed in the incomplete enrollment section with a reference number.

Enrollment Activity Email Notification



Group Billing <groupbilling@legalshieldcorp.com>
Enrollment Activity for (1001)

Bing Maps



Worry Less. Live More.

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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[Privacy Policy](#)
LegalShield | One Pre-Paid Way | Ada, Okla 74004
Document ID: PPLSI-GS-5014-A1

Click link to view My Group Account login page.

Click link to opt out of enrollment notifications for group.

Opt Out: Enrollment Activity Email Notifications

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




You have requested to no longer receive enrollment notifications for your group. Please click the appropriate button below.

If you would like to reinstate email notifications in the future, please contact the Group Resources Department at 1-800-876-0030.

I want to continue to receive email notifications:

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



L/S BILLING TEST GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

Processed Enrollments

* indicates activity in the last 30 days.

ENROLL NEW MEMBER

Show 25 entries per page

Search:

* Last Name, First Name	4-SSN	Status	Pay Period	Pay Period Amount	
* Brockhoff, Ross	2222	Active	12	\$30.95	View
Benard, Jason A	4444	Active	12	\$30.95	View
Henry, Julie A	3333	Active	12	\$19.95	View
Nemeth, Michael L	1111	Active	12	\$20.95	View

Showing 1 to 4 of 4 entries

Previous 1 Next

Enrollment activity (*) identifies new enrollments, reinstatements, and plan amount changes within the last 30 days. Use the # of days to filter activity based on preference. Member may appear as multiple entries on page if Legal and/or IDShield plans can't be linked. Use sort feature or search option to assist in locating a member.

Incomplete Enrollments

Last Name	First Name	Reference #
-----------	------------	-------------

Additional information is required to process the memberships. Please contact the Group Resources Department at 1-800-876-0030 or via email at groupresources@legalshieldcorp.com

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

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

3. Select enroll new member option to complete online application.

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

5. Click view to view all enrollment information for member.

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

- Enroll new member option, on the enrollment admin page, allows a user account to submit new enrollment information to LegalShield by completing an online application when applicable.
- Name, SSN, DOB, address, and email are required fields for online application. Employee id, pay period, and division will only be required for enrollment if requested by group. If only one pay period is on file, page will default to the one pay period.
- Membership effective date can be current date up to 120 days in advance.
- Plan offerings will be displayed based on new member's state selection. User must select state in address section of online application before plan offerings will be displayed.
- Spouse/Dependent information should only be entered for family plan offerings.
- New members submitted must be processed by LegalShield before viewable on the Enrollment Admin page. Standard processing time is 24-48 business hours.

Enroll New Member Submission

Enter enrollment information.

Enroll New Member

Title:

▼

*First Name:

*Last Name:

Suffix:

▼

*Address:

*City:

*State/Prov:

▼

*Zip/Postal Code:

*Membership Effective Date:

* Required

*Last 4 SSN:

*Date of Birth:

Employee ID:

Home Phone:

Work Phone:

Work Phone Ext:

Cell Phone:

*Email:

Division:

Pay Period:

12

*Available Plans

Plan Description	Deduct Amt	Monthly Amt	Select
Select a state to see available plans.			

Dependent Information

First Name	Last Name	Date Of Birth	Type	Option
<div>+ Add Dependent(s)</div>				

Dependent coverage is based on plan selection. Please enter dependent information when applicable.

BACK


SUBMIT

Click submit to send new enrollment to LegalShield.

- Click submit to send new enrollment to LegalShield.

Enroll New Member Confirmation

Confirmation message appears after user clicks submit button to send enrollment information to LegalShield.



L/S BILLING TEST GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

✓ John Doe: New Member was saved

Processed Enrollments

* indicates activity in the last 30 days.

ENROLL NEW MEMBER

Show 25 entries per page

Search:

* Last Name, First Name	4-SSN	Status	Pay Period	Pay Period Amount	
* Brockhoff, Ross	2222	Active	12	\$30.95	View
Benard, Jason A	4444	Active	12	\$30.95	View
Henry, Julie A	3333	Active	12	\$19.95	View
Nemeth, Michael L	1111	Active	12	\$20.95	View

Showing 1 to 4 of 4 entries

Previous1Next

Enrollment activity (*) identifies new enrollments, reinstatements, and plan amount changes within the last 30 days. Use the # of days to filter activity based on preference. Member may appear as multiple entries on page if Legal and/or IDShield plans can't be linked. Use sort feature or search option to assist in locating a member.

Incomplete Enrollments

Last Name	First Name	Reference #
-----------	------------	-------------

Additional information is required to process the memberships. Please contact the Group Resources Department at 1-800-876-0030 or via email at groupresources@legalshieldcorp.com

- All user accounts can update membership information such as name, address, DOB, phone, email, pay period, division, and employee id for active members.
- Update feature is available within the membership view under the Enrollment Admin page.
- Pay period, division, and employee id will be required fields for groups utilizing this information for billing purposes.
- Membership updates processed on the website occur real time.
- Updates can be applied to all memberships linked to member or each membership individually.

Membership Update Option

Select the update option in the member information section to update membership(s).

Memberships

▼ Legal Plan - Member # 10075487396

Member Information - UPDATE

CANCEL MEMBERSHIP(S)

Production Date:06-04-2004

Effective Date:06-02-2004

Pay Period:12

Pay Period Amount:\$15.95

Division:

Monthly Amount:\$15.95

Last Plan Amount Update:04-04-2016

Status:Active

Title:MR

Last 4 SSN:xxx-xx-2222

First Name:Ross

Date of Birth:01-01-1980

Last Name:Brockhoff

Employee ID:

Suffix:

Home Phone:580-436-1234

Address:One PrePaid Way

Work Phone:

Work Phone Ext:

Cell Phone:

Email:ross@test.com

City:ADA

State/Province:OK

Zip/Postal Code:74820-1300

Dependent Information - UPDATE

First Name	Last Name	Date of Birth	Type
Jane L	Brockhoff	04-12-1982	SPOUSE
Russ	Brockhoff	01-05-2016	DEPENDENT

*Dependent coverage is based on member's plan selection.

Membership Update Page

1. Editable fields are outlined on page. Make all necessary updates.

Legal Plan - Member # 10075487396
Production Date: 06-04-2004
Pay Period: 12
Division:
Last Plan Amount Update: 04-04-2016

Title: MR
First Name: Ross
Last Name: Brockhoff
Suffix:
Address: One PrePaid Way

City: ADA
State/Prov: OK
Zip/Postal Code: 74820 - 1300

Effective Date: 06-02-2004
Pay Period Amount: \$15.95
Monthly Amount: \$15.95
Status: Active

Last 4 SSN: xxx-xx-2222
Date of Birth: 01-01-1980
Employee ID:
Home Phone: 580 - 436 - 1234
Work Phone:
Work Phone Ext:
Cell Phone:
Email: ross@test.com

Apply updates to one of the following:
☒ All memberships
☐ 10075487396 - Legal Plan Only
☐ 70042582976 - IDShield Plan Only

BACK

SUBMIT

2. Select back to return without applying updates.

3. If member has multiple memberships linked, this message will display allowing the user to select how to apply the requested updates.

4. Select submit to process updates.

- All user accounts can add or update spouse /dependent information for active members.
- Update feature is available within the membership view under the Enrollment Admin page.
- Name, DOB, and relation are required fields for spouse / dependents.
- Updates must be processed per each membership linked to member.
- Dependent updates processed on the website occur real time.
- Spouse and/or dependents can only be added to Family Legal and IDShield Plans.

Dependent Update Option

Memberships

▼ Legal Plan - Member # 10075487396

Member Information - UPDATE

CANCEL MEMBERSHIP(S)

Production Date:	06-04-2004	Effective Date:	06-02-2004
Pay Period:	12	Pay Period Amount:	\$15.95
Division:		Monthly Amount:	\$15.95
Last Plan Amount Update:	04-04-2016	Status:	Active

Title:	MR	Last 4 SSN:	xxx-xx-2222
First Name:	Ross	Date of Birth:	01-01-1980
Last Name:	Brockhoff	Employee ID:	
Suffix:		Home Phone:	580-436-1234
Address:	One PrePaid Way	Work Phone:	
		Work Phone Ext:	
		Cell Phone:	
City:	ADA	Email:	ross@test.com
State/Province:	OK		
Zip/Postal Code:	74820-1300		

Dependent Information - UPDATE

First Name	Last Name	Date of Birth	Type
Jane L	Brockhoff	04-12-1982	SPOUSE
Russ	Brockhoff	01-05-2016	DEPENDENT

*Dependent coverage is based on member's plan selection.

Select update option in the dependent information section to update a spouse/dependent.

Dependent Information

First Name	Last Name	Date of Birth	Type	Option
<input type="text" value="Jane L"/>	<input type="text" value="Brockhoff"/>	<input type="text" value="04-12-1982"/>	SPOUSE	<input type="checkbox"/> Delete
<input type="text" value="Russ"/>	<input type="text" value="Brockhoff"/>	<input type="text" value="01-05-2016"/>	DEPENDENT	<input type="checkbox"/> Delete
<div>+ Add Dependent(s)</div>				
<div>BACK</div>			<div>SUBMIT</div>	

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1. Update current spouse and/or dependent(s).

2. Add a spouse and/or dependent(s).

3. Select back to return without applying updates.

5. Select submit to process updates.

4. Delete to remove a spouse and/or dependent(s)

- All user accounts can process cancellations for active members.
- Feature is available within the membership view under the Enrollment Admin page.
- Cancel reasons are no longer employed, written request, deceased, and leave of absence.
- Cancellations can be applied to all memberships linked to member or each membership individually.
- Effective date of cancel can only be entered with a current date up to 90 days in advance.
- Once membership cancel date occurs, it will be removed from the Enrollment Admin page. Cancellations are processed at the end of business day for the date requested.
- User accounts have the ability to rescind a cancellation request before the cancel date occurs.

Membership Cancellation Option

Memberships

▼ Legal Plan - Member # 10075487396

Member Information - UPDATE

CANCEL MEMBERSHIP(S)

Production Date:06-04-2004

Effective Date:06-02-2004

Pay Period:12

Pay Period Amount:\$15.95

Division:

Monthly Amount:\$15.95

Last Plan Amount Update:04-04-2016

Status:Active

Title:MR

Last 4 SSN:xxx-xx-2222

First Name:Ross

Date of Birth:01-01-1980

Last Name:Brockhoff

Employee ID:

Suffix:

Home Phone:580-436-1234

Address:One PrePaid Way

Work Phone:

Work Phone Ext:

Cell Phone:

Email:ross@test.com

City:ADA

State/Province:OK

Zip/Postal Code:74820-1300

Dependent Information - UPDATE

First Name	Last Name	Date of Birth	Type
Jane L	Brockhoff	04-12-1982	SPOUSE
Russ	Brockhoff	01-05-2016	DEPENDENT

*Dependent coverage is based on member's plan selection.

Select the cancel option in the member information section to cancel a membership.

1. Cancel date pre-populates current date. User can change up to 90 days in advance.

2. Select back to return without processing cancel.

Cancel Membership(s)

Member Name:

Ross Brockhoff

Cancel Date:

05-12-2016

Cancel Reason:

NO LONGER EMPLOYED

DECEASED

NO LONGER EMPLOYED

MEMBER REQUESTS CANCEL

LEAVE OF ABSENCE

Apply updates to one of the following:

☒ All memberships

☐ 10075487396 - Legal Plan Only

☐ 70042582976 - IDShield Plan Only

Cancellations may be entered for current date up to 90 days in advance. Members will be viewable under the enrollment admin page until the cancel date has occurred.

BACK

SUBMIT

3. Cancel reasons.

4. If member has multiple memberships linked, this message will display allowing user to select which membership(s) to cancel.

5. Select submit to process cancel request.

Membership Cancellation Confirmation

1. Cancellation confirmation message is displayed.

✓ Member: Ross Brockhoff - 10075487396 - Has been updated.

Memberships

▼ Legal Plan - Member # 10075487396

Member Information - UPDATE

REMOVE FUTURE CANCEL DATE - 2016-05-12

Production Date:	06-04-2004	Effective Date:	06-02-2004
Pay Period:	12	Pay Period Amount:	\$15.95
Division:		Monthly Amount:	\$15.95
Last Plan Amount Update:	04-04-2016	Status:	Active

Title: MR

First Name: Ross

Last Name: Brockhoff

Suffix:

Address: One PrePaid Way

City: ADA

State/Province: OK

Zip/Postal Code: 74820-1300

Last 4 SSN: xxx-xx-2222

Date of Birth: 01-01-1980

Employee ID:

Home Phone: 580-436-1234

Work Phone:

Work Phone Ext:

Cell Phone:

Email: ross@test.com

Dependent Information - UPDATE

First Name	Last Name	Date of Birth	Type
Jane L	Brockhoff	04-12-1982	SPOUSE
Russ	Brockhoff	01-05-2016	DEPENDENT

*Dependent coverage is based on member's plan selection.

2. Cancel effective date will populate within membership page.

3. Select option to rescind cancel request before date occurs. User will be asked to confirm the removal of the future cancel date.

- 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.



L/S BILLING TEST GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

LegalShield makes it easy to access member information. To generate an excel report, simply select the options that best fit your needs and click the "Submit" button. The report will provide a census of all member information on file for your group account such as: name, contact info, plan description, membership number and more. Depending on your browser's settings, you may be asked to download the file for viewing. Save the file for easy access later or simply request another report.

Select report type. Report defaults to active members with no dependents.

Report type:

☒ Active Members

☐ Canceled Members

☐ Pending Members

☐ All Members

Show Dependents:

☐ Yes


☒ No

SUBMIT

Click submit to view info. in excel file format.

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L/S BILLING TEST GROUP

LOGOUT

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The Online Group Resources page provides LegalShield Group Plan Administrators access to various tools to help maintain the group account as well as the members enrolled in the benefit.

[Group Benefit Guide](#)

A guide to managing your LegalShield employee benefits.

[Learn About My Group Account](#)

A detailed guide of the My Group Account website.

[LegalShield's W9 Form](#)

We provide this document for those required to file an information return with the IRS.

[My Group Account Quick Start Guide](#)

A guide to managing your group account online.

[Payment Option Form](#) (United States)

Use this form when your employees need to change how they pay for their LegalShield membership(s).

[Payment Option Form](#) (Canada)

Use this form when your employees need to change how they pay for their LegalShield membership(s).


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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.

Use contact information for questions regarding your group account.



L/S BILLING TEST GROUP

SWITCH GROUP

LOGOUT

Account Information

Billing Information

Enrollment Admin

Reports

Resources

Contact Us

For Billing Inquiries contact:

Group Billing Department

E: groupbilling@legalshieldcorp.com

P: 1-800-972-9272

F: 580-310-6962

Remittance Address

LegalShield

P.O. Box 2629

Ada, OK 74821

Physical Address

LegalShield

One Pre-Paid Way

Ada, OK 74820

Hours of Operation

Monday - Friday

7:00 a.m. to 7:00 p.m. CST

For Employees:

Employees with questions regarding their available benefits may contact our Member Services Department:

Member Services

E: memberservices@legalshieldcorp.com

P: 1-800-654-7757

F: 1-800-811-4538

Hours of Operation

Monday - Friday

7:00 a.m. to 7:00 p.m. CST

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Provide contact information to employees that may have questions regarding their membership.

THANK YOU

