

## Your Quick-Start Guide

to managing your LegalShield group account online

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### 1. 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.

### 2. User Account Set Up

LegalShield will setup the Plan Administrator and LegalShield Associate to receive online access. The Plan Administrator will have online access to add Authorized Users. Name, email address, phone number, phone extension, and fax can be stored for each user account. (Name and email are required fields with email address being your user login name.)

A Welcome Email is generated when the user account is set up to receive online access. The email notification has the link to set up your password and Login to the My Group Account Website. Upon initial login, each new user account will be asked to agree to LegalShield's terms of service.

### 3. Current Features Available

**Login Page**—Login to the My Group Account Website at [w3.legalshield.com/grpbilling/init](http://w3.legalshield.com/grpbilling/init). A forgot password option is available for users to request a password reset email.

**Account Information Page**—Displays group name, group number, mailing and billing address of group, and user accounts with online access (mailing and billing address can be updated online).

**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. Payments remitted to LegalShield must include an invoice date. Pending payments received by LegalShield are also listed here.

**Enrollment Admin Page**—View enrollment information for active and pending members. An enrollment activity indicator (\*) is placed next to new members or any existing members with a recent plan amount update. An email notification is generated when enrollment activity occurs.

Additional Enrollment Admin features allow user accounts to process membership updates and cancellations as they occur. Also, an enroll new members option is available for users to enter new member information through an online application when applicable.

**Reporting Page**—Generate a report of all member information in an excel file format when needed.

**Resources Page**—Access to PDF documents such as the LegalShield Group Benefit Guide, W9, member payment option forms, and a detailed My Group Account training guide.

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