



BROKER

August 2019 Release Notes

1 Reporting: improvements to employer reports

1. Standard Report "Employee Deductions" improved and re-named to be called "Most Recent Elections."
2. Custom Reports: "Most recent elections" and "Eligibility" data types added as options for Custom Reports.

2 "Life based on Health"

1. Some employers only want to provide employer-paid life insurance to employees who elect the health plan.
2. When creating a Life Plan, users can now indicate that it is only available if the employee enrolls in the health plan. Otherwise, the Life Benefit Type will not even appear to the employee.

3 Custom Employer Profile Page

1. Brokers have been asking for a place to store miscellaneous information they have on their clients.
2. Different brokers keep track of different sets of information.
3. We created an "Employer Profile Page" that can have a custom layout and custom fields, designed at the Agency level so that it looks exactly as the Agency wants it to look for each employer.

4 COBRA-related build-out improvement

1. Before this update, an Employer has to remember to create a COBRA Benefits Timeframes Subgroup whenever it has a COBRA Benefits Subgroup.
2. With this update, a COBRA Benefits Timeframes Subgroup will automatically be created by BerniePortal as soon as a COBRA Benefits Subgroup is created.

Missed last month's updates?

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