BROKER
March 2019 Release Notes

1 **Spouse/dependents able to apply up to employee's "applied for" amount for Voluntary Life**

1. Before this update, if spouse/dependent Voluntary Life elections were limited by a percentage of the employee's election the limit was applied based on how much coverage the employee had been approved for.

2. With this update, the limit is applied to how much coverage the employee has applied for.

2 **Custom Labeling for Voluntary Life benefit types**

1. Because some brokers and employers like to allow employees to sign up for more than one life insurance plan at the same time, BerniePortal has multiple Voluntary Life benefit types.

2. With this update, employers can give custom labels to the Voluntary Life benefit types to make the way they are labeled.

3. This works similarly to how custom labeling works for the Voluntary benefit types.

3 **New benefit type: LTD (2) and custom labeling of LTD benefit types**

1. Some brokers and employers like to allow employees to sign up for more than one type of Long term disability insurance. The most popular is an LTD policy that pays a monthly amount to the employees. The less common, complementary LTD policy is the type that pays a lump sum to the employee at the time the employee has the long term disability.

2. With this update, employers can now offer both types separately so that employees can sign up for both.

3. In addition to that, employers can give each type a custom label similar to how custom labeling works for the Voluntary benefit types.

4 **New effective date rule option: "first of the month only"**

1. Some insurance companies have rules for some benefit types that require that an employee's effective date can only ever fall on the first of the month. An employee can never have an effective date on a day other than the 1st.

2. With this update, there is a new option that can be checked on a given plan indicating that the effective date for the plan can only ever be the first of a month.

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5 New report type: onboarding report

1. BerniePortal allows employers to ask custom questions of employees during the onboarding process. Employees can also change their answers to those questions after they've onboarded.

2. Before this update, the answers to these questions only appeared on the employee's record.

3. With this update, there is now a report that employers can pull that will have all of the employee's answers to the questions on it.

4. One "use case" example is employee T-Shirt size. If an employer orders t-shirts for employees from time to time and collects employee t-shirt size during onboarding, the employer can now run a report whenever they need everyone's t-shirt size (they don't have to look at each employee record).

6 Improvements to the employer's user interface for reports

1. This update makes it easier for employers to generate reports and limit the output of the reports to certain subgroups of employees.

2. Besides being a more more modern interface, it also sets BerniePortal up to offer custom reports alongside its standard reports.

7 Custom reports: Step 1

1. Before this update, employers could not generate any sort of "custom report". Instead, BerniePortal had standard reports to address needs employers had for getting data out of BerniePortal.

2. While the standard reports generally had all of the information an employer needed, they would not always be in the format desired by the employer. For example, the order of the columns may not be in the order that the employer wanted.

3. With this update, employers can make custom reports that they can re-use that are composed of both demographic data and onboarding data, including the custom questions that employers ask during onboarding. The columns can be in whatever order is desired by the employer.

4. We are calling this "Step 1" because employee deduction and eligibility data will not be available for custom reports with this update. We are planning to add that in a future update later this year.

Missed last month's updates?

Click here to see BerniePortal February 2019 Release Notes