The Business Council of New York State, Inc. (BCNYS) and Equitable (EQH) are excited to announce the newly redesigned EB360® platform. It provides the same level of functionality in managing your Business Council benefit programs, but in a simpler, more easy-to-use navigation format that we hope will enhance your user experience.

This User Guide is an instruction manual on how to navigate the new platform.

Contents

Introduction

Employer/HR Administrator Navigation ................................................................. 2
  Accessing Group Benefits & Plan Details .................................................................. 2
  Group Documents & Dental ID Cards ......................................................................... 3
  Modifying & Adding Employee Enrollments .............................................................. 4
  Evidence of Insurability ............................................................................................ 5
  Invoice & Payment Access ....................................................................................... 6
  Helpful BCNYS Links ............................................................................................ 6
  Navigating Your “Arrow” Button ............................................................................. 7
  Claims Dashboard & Claim Forms .......................................................................... 7
Employer/HR Administrator Navigation

Navigating Your Landing Page

Upon logging into EB360®, you will be directed to your new dashboard, which provides a summary view of your BCNY plans, as well as access to the details of those plans. Also note the arrow (>) button along the left side of your page which gives you additional functionality at your fingertips.

The quick view includes:

- **Current Benefits**: Number of employees per line of coverage based on latest premium statement
- Links to **Plan Details, Group Documents** and **Enrollment**
- Status of **Evidence of Insurability** Dashboard
- Links to **Billing**
- Links to **EAP services**, if applicable
- **Support Contact** information with the Business Council team
- **Helpful BCNY links**, including important documents and Claim forms necessary for the ongoing management of your program
For a deeper view into your plans, you can click into the additional sections:

**Plan Details**: For details on classes and features, click **Go to Plan Details**. Expand the row of coverage you wish to view; a blue tab will represent each available class for that line of coverage. Click on features to see the additional coverage details for each coverage.

![Plan Details](image)

To see your plan details, click **Features** box. By clicking on the box (top left) that says **Only Show Default Features**, you will be shown the high-level provisions of your plan.

![Features](image)

**Group Documents**: This link provides access to important plan documents, including your latest Benefit Summary, Benefit Highlight Sheets (Ameritas), Certificates and any Endorsements added to your Certificate.

All Group Documents will be available based on the unique coverages for a group. A sampling of documents is shown below. Simply expand the document type row to see a list of documents available for that.
When clicking on a document, ensure that pop-up blockers are disabled, and a PDF reader is available on the device you wish to open the document on.

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**Go to Enrollment**

**Modifying & Adding Employee Enrollments**

For groups that use the Equitable enrollment tools, click **Go to Enrollment** from the Current Benefits section.

From the screen below, Admins can add new employees individually by clicking **Add New Employee**.

Individual employee changes can be made by clicking the row for a specific Employee and modifying the coverages, employee profile or dependent information as needed.

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A census can be uploaded for multiple updates at once. Various Enrollment Templates can be downloaded as well to make changes to and then re-upload for multiple updates.

We recommend that you contact your Customer Service Rep at the Business Council for any template uploads.
EOI Application Status Dashboard

For any group with at least one Life or one Disability coverage in the group’s current benefits, an EOI Status dashboard will appear in the admins EB360® landing page. Closed and Pending status counts are reflected on the landing page but details for each application status can be viewed by clicking Go to EOI Dashboard link.

Once the EOI Dashboard is open, click Search. This will display all the applications that have been submitted for the group (although just high-level information, actual applications and the responses provided within the applications will not be accessible).

Additional filter and search criteria can be applied using the filter/search fields on the left to the dashboard. Results provided on a search can also be exported into a Microsoft Excel spreadsheet by clicking Export.

If an Employee wants to submit an EOI application, the EOI Forms are available as well on the BCNYS.org website.
Invoice & Payment Access

All billing functionality can be accessed using the Go to Invoices & Payments link in the Billing section. Once navigated into the billing tool, Employer/Admins can view invoices, see payment history. Groups that have opted for self-administrated billing will also be able to submit headcounts and volumes within the tool so that an invoice can be generated.

For groups that utilize branch billing, a list of branches/locations will be listed for the user to select first before accessing the billing functions.

Helpful BCNYS Links

Connects you directly with the BCNYS Insurance Fund website. All-important forms to manage your plan are included in this section such as Enrollment and Claim Forms in the Helpful BCNY Links section on your landing page
Navigating Your “Arrow” Button

Along the left side of your landing page is an arrow (>) which expands to give you additional functionality or a different path to functionality which exists on your dashboard:

- Enrollment
- Benefits Reports (Enrollment and Census)
- Access to Claim Dashboard for reports and claim forms

Claims Dashboard & Claim Forms

All group admins will have access to Claims Dashboards.

To access Claims Dashboard, expand the left-hand navigation menu and click **Claims Dashboard** in which a new tab will open. The Claims Dashboard can be filtered by Product, Status or Claimant First/Last Name — click **Search** to update the claims dashboard after filter criteria is applied. Apply sorting on any of the columns if desired to further search/enhance the dashboard for viewing needs.

All claim dashboards can be exported into a Microsoft Excel spreadsheet using the Export button. If any filter criteria have been applied, this will reflect in the exported file as well.

To access Claim Forms, simply click **Helpful BCNYS Links** from your Dashboard.