

# Updated EB360® Web Portal User Guide

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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.

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## 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

The screenshot displays the EB360 dashboard with the following sections:

- Current Benefits:** A table with two columns: 'Life' showing 18 employees and 'NY EAP' showing 0 employees. Navigation links for 'Go to Plan Details', 'Group Documents', and 'Go to Enrollment' are located to the right.
- EOI Statuses:** A table with two columns: 'Closed' showing 0 and 'Pending' showing 0. A 'Go to EOI Dashboard' link is positioned below the table.
- Billing:** A section with a 'Go to Invoices & Payments' link.
- Value Added Services:** A section titled 'Employee Assistance Program' with 'Learn More' and 'View Website' links.
- Support Contact:** A section header at the bottom of the dashboard.

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**

Group Life - Active

1 All Active FT Employees

Basic Group Life Features Rates

Effective Date 01/01/2020	Internal Code G01501_M310100	Takeover Group N	Current Waiting Period 3 Day(s)	Current Next Eligible Day of Month Date of
Renewal Date 11/01/2020	External Code G01501	Comp Hierarchy Y	Future Waiting Period 3 Day(s)	Future Next Eligible Day of Month Date of
Termination Date	Carrier Code	Plan/Calendar Year		EAP Mask
Class Effective Date 09/18/2018	Class Termination Date	Original Effective Date	Coverage Code	Approved Date
Minimum Hours 30	Earnings Definition BAEBONUS	Avg. Months No. 12		

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.

**Feature Names**

Only Show Default Features

Feature Name	Feature Value	Effective Start Date	Effective End Date
Benefit Percentage	60	10/01/2018	
Maximum Monthly Benefit	\$5000	10/01/2018	
Elimination Period (in days)	180	10/01/2018	
Minimum Monthly Benefit	Greater of \$100 or 10% of Gross benefit	10/01/2018	
Guaranteed Issue Amount	\$5000	10/01/2018	

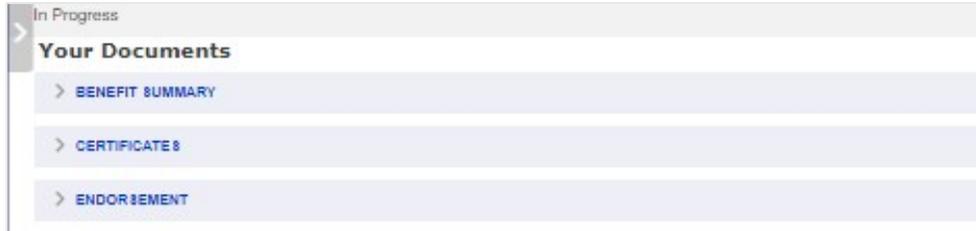
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CLOSE

**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 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.



## 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.

Enrollment									
Search by last name or last 4 of SSN...						+ Add New Employee		Cancel Upload ^	
Download Enrollment Templates								+ Choose Census	
Last Name	First Name	SSN	Role	DOB	Status	Start Date	Termination Date	Cert Number	
Ten	Curtis	****0420	E	09-21-1970	T	10-03-2019	02-26-2020	00188967	Terminate
Spring	Jennifer	****3258	E	08-31-1975	T	10-10-2007	12-01-2018	00188968	Terminate
Apple	Timothy	****8545	E	04-26-1959	T	02-19-2007	12-18-2018	00188969	Terminate
Red	Cindy	****4029	E	12-20-1961	T	04-14-2014	05-01-2019	00188970	Terminate
Cherry	Emmanuel	****3924	E	07-30-1986	T	08-01-2016	10-22-2019	00188971	Terminate
Pear	Carl	****7420	E	11-22-1962	A	05-17-2004		00188972	Terminate
Twenty	Jeffery	****4183	E	03-22-1971	T	03-15-2010	05-29-2019	00188973	Terminate
Autumn	Robert	****3210	E	03-15-1949	T	05-27-1997	02-26-2020	00188974	Terminate
Four	Rhonda	****5281	E	11-13-1960	T	01-05-2004	01-09-2020	00188975	Terminate
Yellow	Dwight	****4276	E	05-21-1964	T	10-10-2016	04-01-2019	00188976	Terminate

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.

Welcome to your EOI Dashboard!

EOI Status Report as of 4/5/20

Go to: [EOI Forms / Online Submission](#)

Search      Export

Generate Report By:

Applications Received Within:

First Name:       Last Name:

Group Number	Group Name	Employee Last Name	Employee First Name	Plan Type	Requested Amount	GI Amount	Status	Received Date	Status Date	Track Status	Received Method	UW Decisor
004397	SD Enrollment Testing ##	Ten	Curtis	Basic Group Life	\$55,000	\$50,000	EOI Not Needed	2/21/20	3/25/20	SFCNN	Email	NN
004397	SD Enrollment Testing ##	Autumn	Robert	Basic Group Life	\$55,000	\$50,000	EOI Not Needed	2/21/20	3/25/20	SFCNN	Email	NN
004397	SD Enrollment Testing ##	Autumn	Robert	Basic Group Life	\$55,000	\$50,000	EOI Not Needed	2/21/20	3/25/20	SFCNN	Email	NN
004397	SD Enrollment Testing ##	Pear	Carl	Basic Group Life	\$150,000	\$50,000	Declined	2/13/20		SFCD	Online	DCL

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.



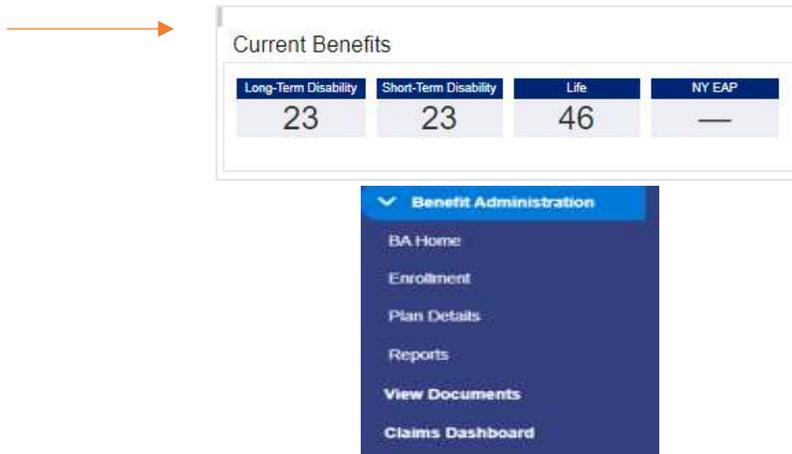
## Helpful BCNYS Links

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

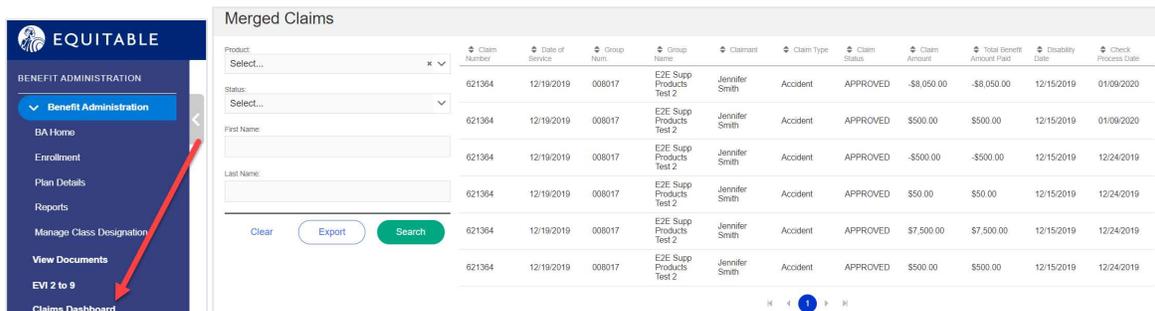


## Claims Dashboard & Claim Forms

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.

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Some products are not available in all states.

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