

## Plan Administrator Tip Sheet

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### *Tasks You Can Complete Using the 'I am a Plan Administrator' Portal*

- ✓ Add a new employee, including employees who have not yet satisfied the waiting period
- ✓ Modify information for an existing employee such as address, salary, group/client or occupation
- ✓ Terminate an existing employee (termination dates are entered in the Employment Information section)
- ✓ Enter a date of death for an employee (death dates are entered in the same section which includes the employee's name), a spouse or a dependent child
- ✓ Add a new spouse or a new dependent child
- ✓ Terminate an existing spouse or an existing dependent child
- ✓ Add a new beneficiary or modify an existing beneficiary designation
- ✓ Add new Coordination of Benefits information (Spouse's Coverage) or modify existing Coordination of Benefits information
- ✓ Elect single coverage or waive coverage for extended health and dental benefits
- ✓ Enter salary changes for multiple employees using a pre-populated grid

### Tasks You Need to Notify FAS to Complete

- You need to provide proof of school for dependent children who exceed the maximum age limit
- You need to provide proof of guardianship for a dependent child who is neither a natural child nor a common-law child
- You need to provide proof of handicapped status for a dependent child who is handicapped
- Waiting period waivers
- Modify an existing employee's date of hire or reinstatements
- Direct deposit information (either initial entry or modification of existing information)
- Optional life information
- Coordination of benefits information for a child who has other coverage under another plan that is not the spouse's plan.

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### Reminders

- ❖ You can enter changes (i.e. address or salary changes) which take effect as of a future date. Just remember that when viewing information which is displayed for a particular employee, the information which displays is as of the current date. Therefore, information which comes into effect as of a future date will not display until that date.
- ❖ Changes have to be entered in effective date order (from oldest to newest). For example, if you enter a change which is effective as of January 1, 2013, you will subsequently be prevented from saving a change which is effective prior to January 1, 2013. If there is a conflict with effective dates, you will have to contact FAS.
- ❖ An employee will only display if the employee has not been terminated or the employee is not deceased or the employee has not reached the plan's maximum age. If you need to modify a record for an employee who is terminated, deceased or has reached the maximum age, you will have to contact FAS.
- ❖ Plan Administrator access rights are not tied to eligibility. In other words, a Plan Administrator does not necessarily have to be participating in the plan. Therefore, it is very important to notify FAS if an individual should no longer have Plan Administrator rights.
- ❖ Information which you have entered is committed to the live database as soon as you select Save. Which means once you add a new employee or modify information for an existing employee, that employee could immediately access an updated Benefit Summary using the 'I am an Employee' section of the website (unless of course the change was not effective until a future date).

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- ❖ After you add a new employee, you will receive an email from FAS no later than the end of the following business day. This email will contain confirmation of the employee's assigned certificate number and will include a copy of the Benefit Summary.
- ❖ If you need to change an employee's marital status from married to single or from single to married, all you need to do is either add a spouse (if the employee is changing from single to married) or terminate a spouse (if the employee is changing from married to single). Once you add a spouse or terminate a spouse, the system takes care of updating the employee's marital status automatically. Since the system updates the marital status automatically, the marital status field is not even available for entry.