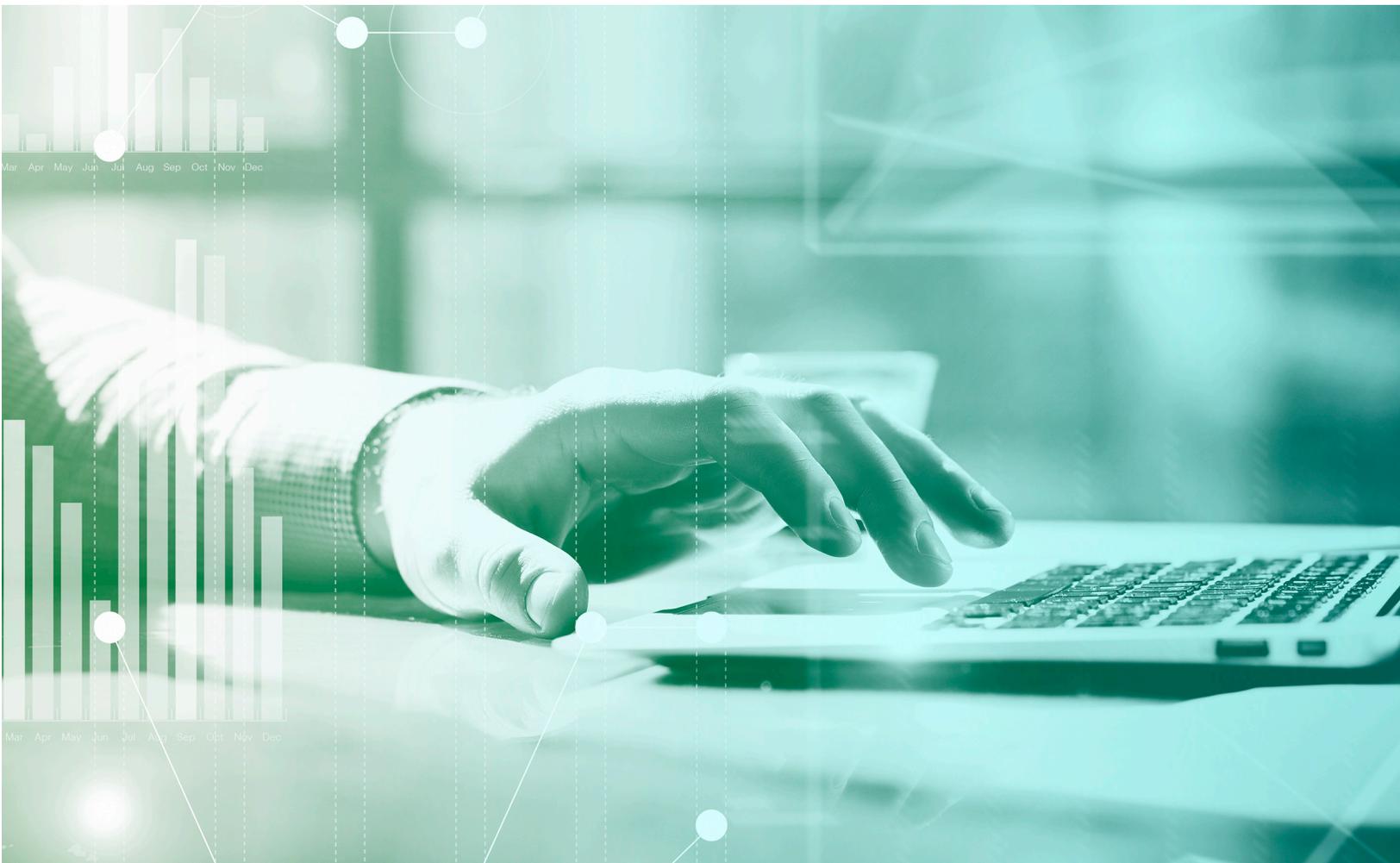


# Benefit Plan Manager (BPM) User Guide



A guide to using the Benefit Plan Manager Portal to review and submit benefits elections.

ClientSpace R151

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# Chapter 1

## Welcome to the Benefit Plan Manager (BPM)

Use the Benefit Plan Manager (BPM) web portal to review benefits renewal options and make benefits selections. It is the equivalent of the Benefits Renewal Workbook that you may have used in the past except that it is now a user-friendly application that makes plan review and comparison, plan selection and final plan approval much easier.

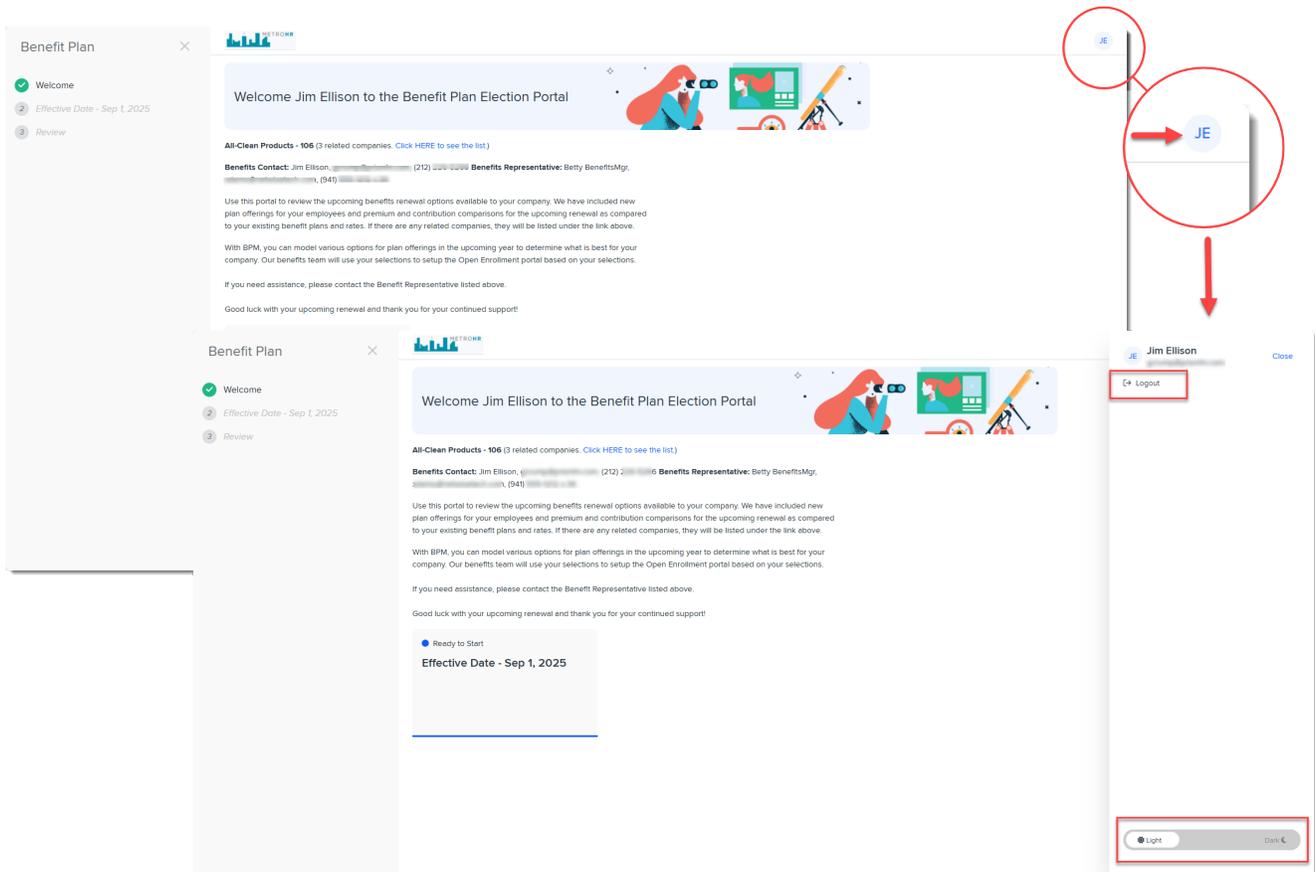
### General Overview of BPM

Benefit Plan Manager (BPM) is a web portal that you can use to review benefits renewal options and make benefits selections. It is the equivalent of the Benefits Renewal Workbook except that it is now a user-friendly application that makes plan review and comparison, plan selection and final plan approval much easier.

### Avatar Icon

The **Avatar Icon** displays in the right corner of BPM and is accessible from anyplace in BPM.

Click it to display a menu containing a **Logout** option and **Light** and **Dark** mode display options.



Click away from the menu to close it or click **Close** in the upper right corner of the menu.

## View Related Companies

If the company is a parent company and there are related child companies, you can **View Related Companies** by clicking the link next to the Client Name and Client Number on the Welcome page.

Benefit Plan

Welcome

All Clean - 2025 Renewal, Effectiv...

Review

Welcome Jim Ellison to the Benefit Plan Election Portal

All-Clean Products - 106 (3 related companies) [Click HERE to see the list.](#)

Benefits Contact: Jim Ellison, gcrump@prismhr.com, (212) 226-5266 Benefits Representative: Betty BenefitsMgr, xdemo@netwisetech.com, (941) 555-1212 x:36

Use this portal to review the upcoming benefits renewal options available to your company. We have included new plan offerings for your employees and premium and contribution comparisons for the upcoming renewal as compared to your existing benefit plans and rates. **If there are any related companies, they will be listed under the link above.**

Client Name	Client ID
ALL LOVING HANDS WITH CARING HEARTS,HOME CARE LLC.	999
GWEN'S GADGET COMPANY LLC	106

All Clean - 2025 Renewal  
Effective Date - Sep 1, 2025

## Welcome Page

When you first access BPM, you see the Welcome page. You select the batch by clicking the Benefits Batch card.

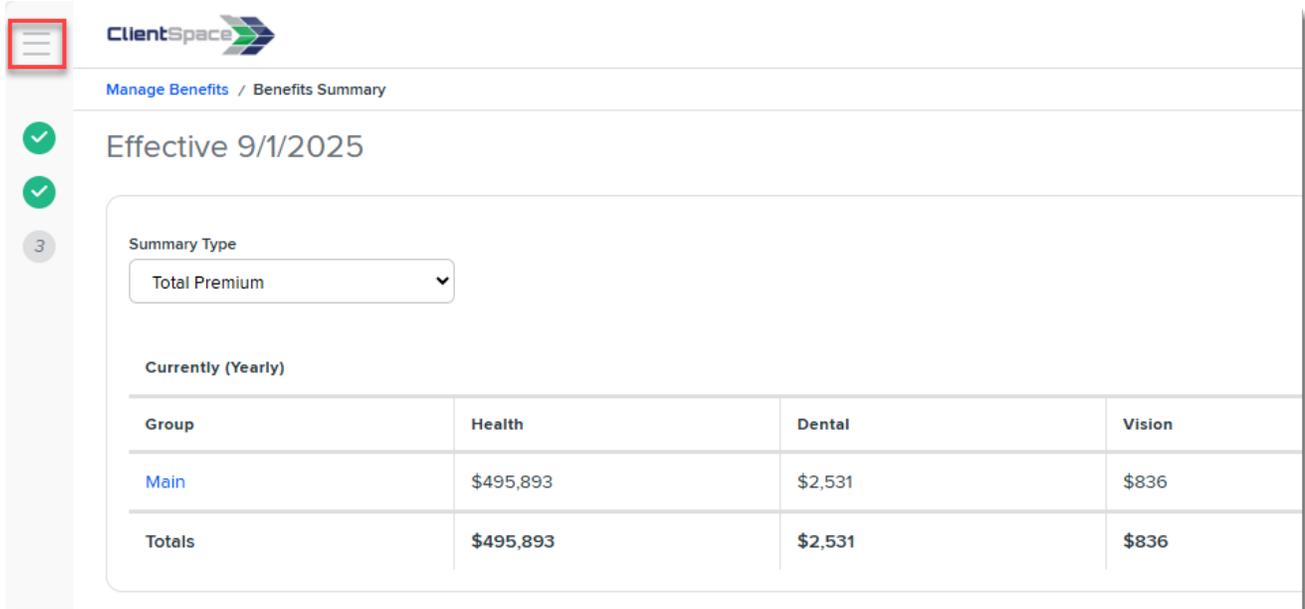
BPM indicates previously completed and current steps by displaying a green check mark next to a current or previous navigation menu item. While you cannot bypass a step to skip ahead, you can go back to a previous step by clicking the green check.

Effective 9/1/2025				
Summary Type				
Total Premium				
Currently (Yearly)				Renewal (Year)
Group	Health	Dental	Vision	Health
Main	\$495,893	\$2,531	\$836	\$350,006 (-2)
Executives	-	\$2,321	-	-
<b>Totals</b>	<b>\$495,893</b>	<b>\$4,853</b>	<b>\$836</b>	<b>\$350,006 (-2)</b>

## Expand and Collapse Navigation Pane

When you first access BPM, the left navigation pane is expanded by default. The left navigation on all other pages is collapsed by default once you click the batch card to go to Step 2. However, if you manually collapse or expand the navigation pane, BPM "remembers" your selection and applies it to all pages.

To manually expand the navigation pane, click the Hamburger menu in the upper left corner of the screen:



ClientSpace

Manage Benefits / Benefits Summary

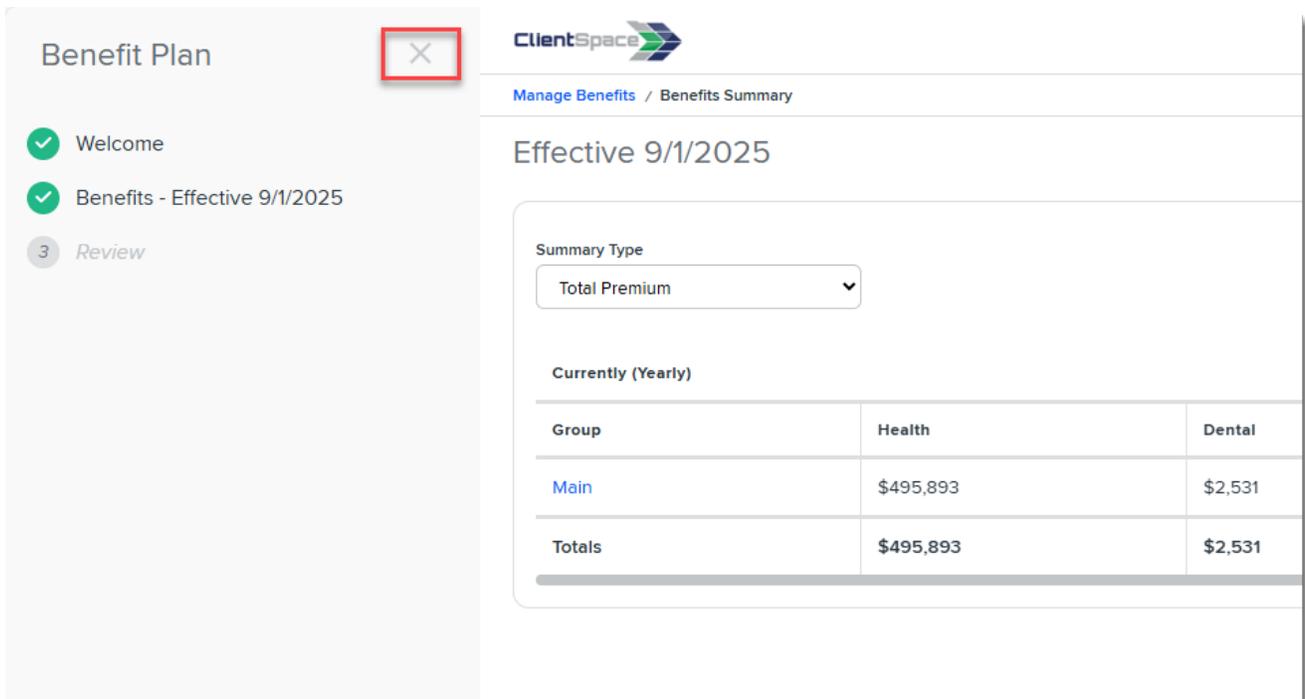
Effective 9/1/2025

Summary Type  
Total Premium

Currently (Yearly)

Group	Health	Dental	Vision
Main	\$495,893	\$2,531	\$836
<b>Totals</b>	<b>\$495,893</b>	<b>\$2,531</b>	<b>\$836</b>

To collapse the navigation pane, click the **X** in the top right of the expanded navigation pane:



Benefit Plan

ClientSpace

Manage Benefits / Benefits Summary

Effective 9/1/2025

Summary Type  
Total Premium

Currently (Yearly)

Group	Health	Dental
Main	\$495,893	\$2,531
<b>Totals</b>	<b>\$495,893</b>	<b>\$2,531</b>

## Chapter 2

# Using BPM with Prior Batch History

If you have been through a renewal process with us before, BPM presents you with batch comparison data of the currently active plans to the offered plans up for renewal. You can review side-by-side comparisons of **Current** to **Renewal** statistics for the benefit group(s) (i.e., Health, Dental, Vision, etc.)

As you drill down further into each benefit group, you can evaluate calculated percentages of increase or decrease in premiums and contributions from the **Current** year to the **Renewal** year.

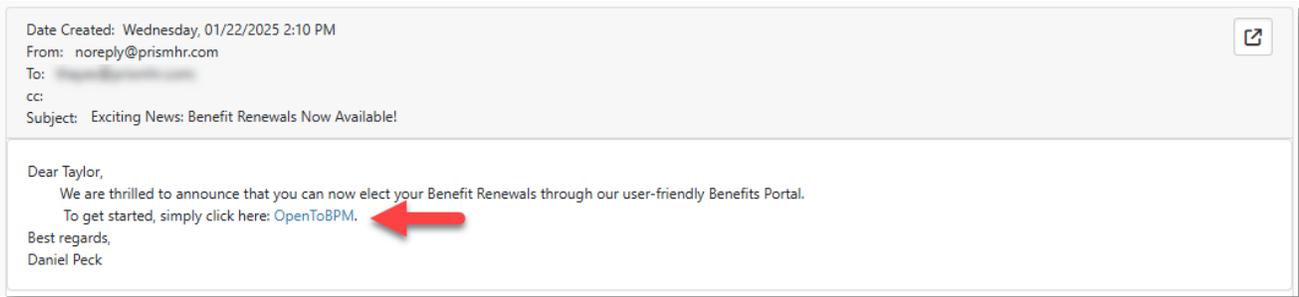
**Note:** If any of the plans being offered in the renewal years are new plans, the percentage of increase or decrease is not calculated for those since there is no Current Year data to use for comparison calculations.

## Option 1: Reviewing, Selecting, and Approving Benefits With Prior Batch History

### Step 1: Log in to BPM

When offered benefits are ready to review, you will receive an email similar to below announcing that benefits are ready to review in the Benefit Plan Manager (BPM) portal. The email will contain a link to access the portal.

**Note:** Some of the verbiage and design elements in the example images displayed here will vary slightly from your actual screens due to differences in software configuration. However, the functionality is the same.



### To log in to BPM:

1. Open the email announcing that benefits are ready for your review and click the link to open BPM. The BPM Login Window displays.

**ClientSpace**

## Benefit Plan Election Portal

To get started, enter your client number and last name.

If you experience any difficulty logging in, please contact us at 1-800-HELP-NOW.

Client Number

Last Name

Next

© 2025 PrismHR

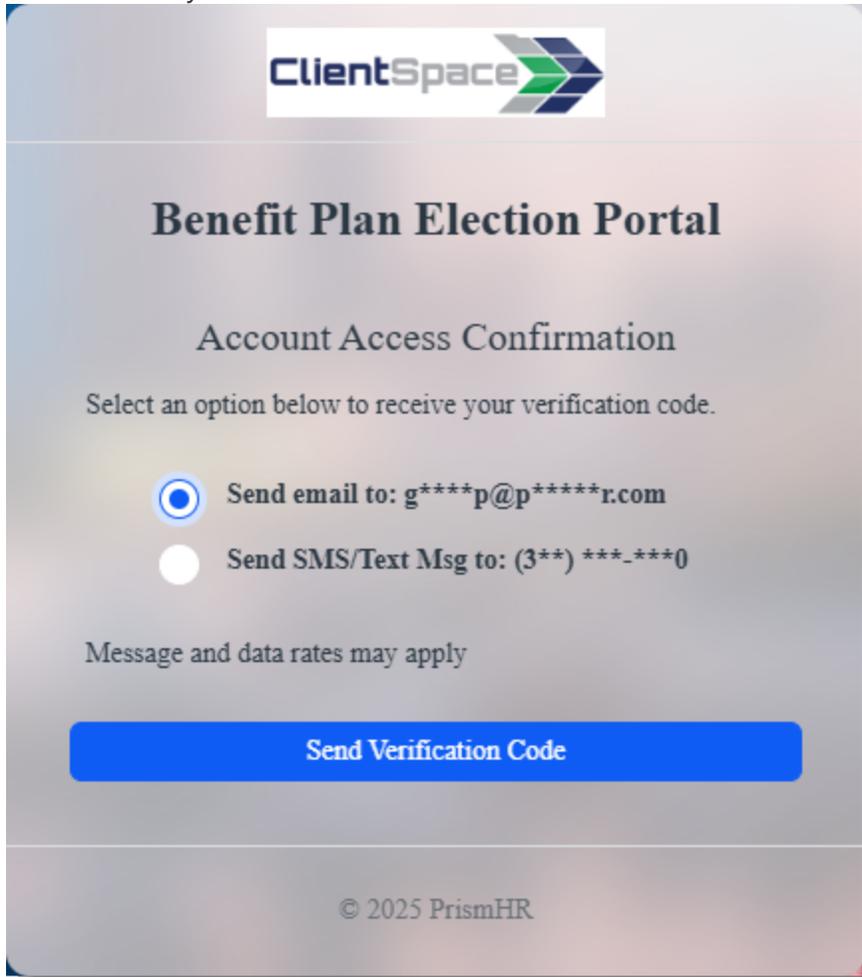
2. Enter your **Client Number** and **Last Name** and then click **Next**. The Account Access Confirmation window displays.

**Note:** If you do not know your **Client Number**, contact your Benefits Representative.

3. Click the option to send the code to either your mobile phone number or email address and then click **Send Verification Code**.

A data entry field displays for entering the code.

**Note:** You must use the mobile phone number or email address that your Benefits Representative has on file for you.

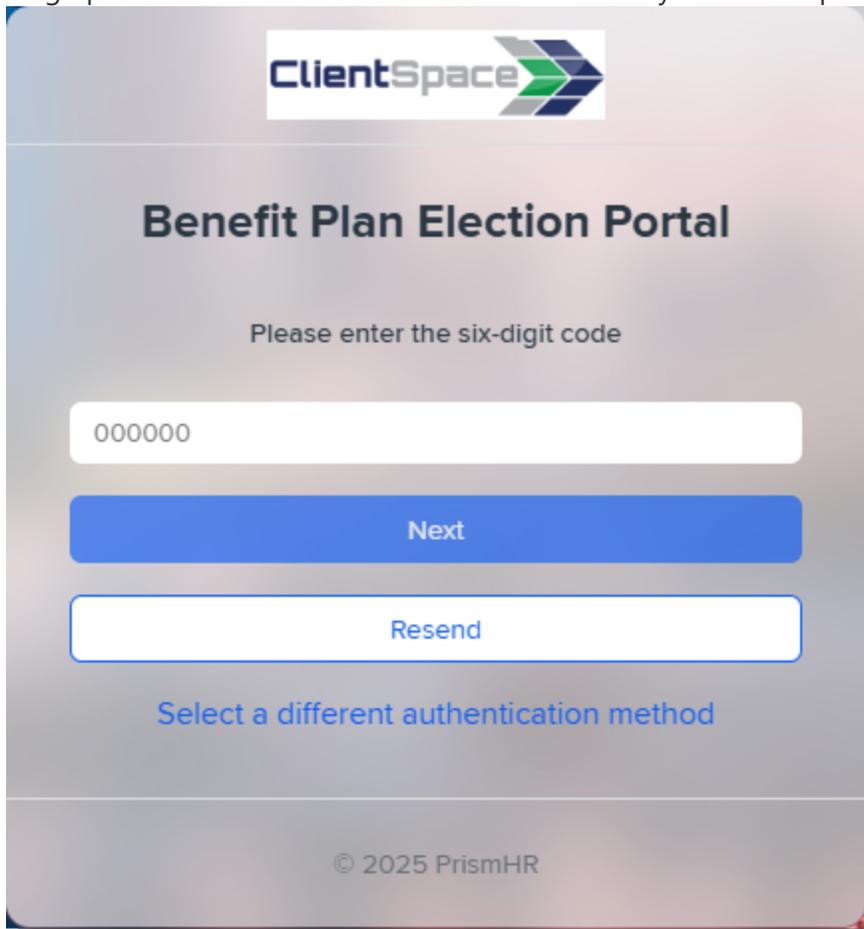


The screenshot shows the ClientSpace logo at the top. Below it is the title "Benefit Plan Election Portal" and the subtitle "Account Access Confirmation". The instruction "Select an option below to receive your verification code." is followed by two radio button options: "Send email to: g\*\*\*\*p@p\*\*\*\*\*r.com" (which is selected) and "Send SMS/Text Msg to: (3\*\*) \*\*\*-\*\*\*\*0". A note states "Message and data rates may apply". A large blue button labeled "Send Verification Code" is at the bottom. The footer contains "© 2025 PrismHR".

4. Once you receive the code, enter it in the space provided and click **Next**.

**Note:** Additional options display on this screen for resending the code or selecting a different authentication method. If you select the option to use a different authentication method, you are returned to the Account Access Confirmation window. The only two options are email or SMS/Text Msg to your mobile phone and you can select the alternative option if the first option

failed. For instance, if you were unable to receive a verification code via email, select the SMS/Text Msg option to receive the verification code via text your mobile phone number.

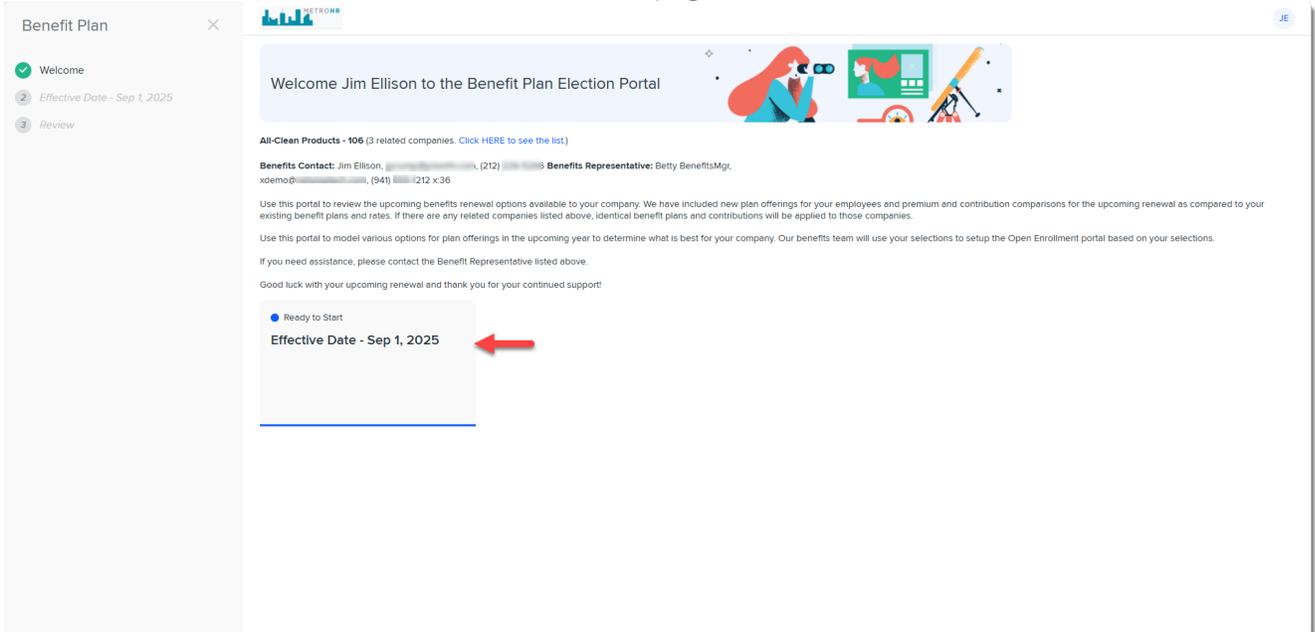


After successful authentication of the verification code, the BPM Welcome page displays.

## Step 2: Open the Batch

### To open the batch:

1. Click the Benefits Batch card on the BPM Welcome page.



### Note:

- If there is more than one Benefits Batch Card, using the displayed effective date on the card may help you quickly identify the batch you want to review.
- If your company is a parent company and you have related child companies, you may also see a **Related Companies** link on the Welcome Page next to the Client Name and Client Number. Click the link to display the related

companies.

Benefit Plan

Welcome Jim Ellison to the Benefit Plan Election Portal

All-Clean Products - 106 (3 related companies. [Click HERE to see the list.](#))

Benefits Contact: Jim Ellison, gcrump@prismhr.com, (212) 226-5266 Benefits Representative: Betty BenefitsMgr, xdemo@netwisetech.com, (941) 555-1212 x.35

Use this portal to review the upcoming benefits renewal options available to your company. We have included new plan offerings for your employees and premium and contribution comparisons for the upcoming renewal as compared to your existing benefit plans and rates. **If there are any related companies, they will be listed under the link above.**

Client Name	Client ID
ALL LOVING HANDS WITH CARING HEARTS, HOME CARE LLC.	999
GWEN'S GADGET COMPANY LLC	106

All Clean - 2025 Renewal  
Effective Date - Sep 1, 2025

The batch opens to the **Benefits Summary** tab and displays a summary of the offered benefits in this benefits batch. Use the vertical and horizontal scroll bars as necessary to view the entire grid.

Benefit Plan

ClientSpace

Manage Benefits | **Benefits Summary**

Effective 9/1/2025

Summary Type: Total Premium

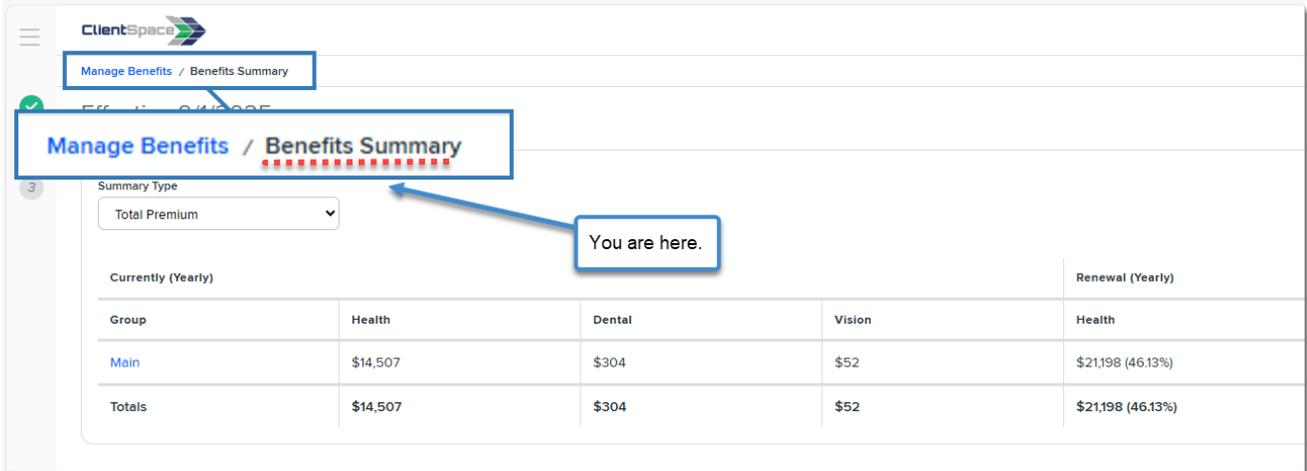
Group	Currently (Yearly)			Renewal (Yearly)		
	Health	Dental	Vision	Health	Dental	Vision
Main	\$495,893	\$2,531	\$836	\$352,366 (-28.94%)	\$3,823 (51.02%)	\$1,410
Totals	\$495,893	\$2,531	\$836	\$352,366 (-28.94%)	\$3,823 (51.02%)	\$1,410

Horizontal scroll bar

**Tip:** Clicking **Manage Benefits** or **Welcome** in the navigation pane takes you back to the Welcome page.

### Step 3: Review the Benefits Summary

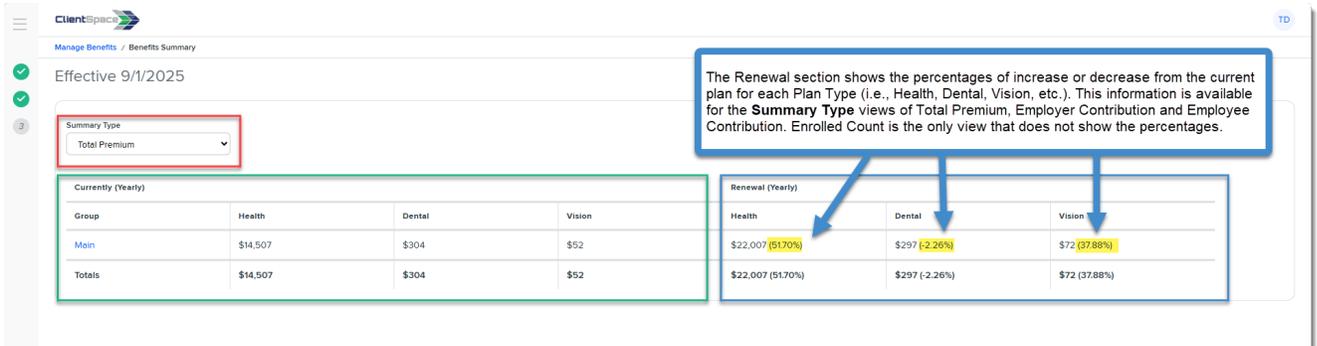
Once you open the batch, you are on the **Benefits Summary** tab where you can review **Benefits Summary** details.



To review the benefits summary:

1. On the **Benefits Summary** tab, review the side-by-side comparison of **Current** to **Renewal** statistics for the benefit group(s). Change the **Summary Type** view from the default of Total Premium to other available views: Employer Contribution, Employee Contribution, and Enrolled Count.

#### Total Premium



### Employer Contribution

ClientSpace  
Manage Benefits / Benefits Summary

Effective 9/1/2025

Summary Type: **Employer Contribution**

Currently (Yearly)				Renewal (Yearly)		
Group	Health	Dental	Vision	Health	Dental	Vision
Main	\$8,818	\$135	\$26	\$15,420 (74.86%)	\$140 (3.58%)	\$40 (55.52%)
Totals	\$8,818	\$135	\$26	\$15,420 (74.86%)	\$140 (3.58%)	\$40 (55.52%)

### Employee Contribution

ClientSpace  
Manage Benefits / Benefits Summary

Effective 9/1/2025

Summary Type: **Employee Contribution**

Currently (Yearly)				Renewal (Yearly)		
Group	Health	Dental	Vision	Health	Dental	Vision
Main	\$5,688	\$169	\$27	\$6,587 (15.80%)	\$157 (-6.94%)	\$32 (20.75%)
Totals	\$5,688	\$169	\$27	\$6,587 (15.80%)	\$157 (-6.94%)	\$32 (20.75%)

### Enrolled Count

ClientSpace  
Manage Benefits / Benefits Summary

Effective 9/1/2025

Summary Type: **Enrolled Count**

Currently (Yearly)				Renewal (Yearly)		
Group	Health	Dental	Vision	Health	Dental	Vision
Main	11	8	4	18	7	5
Totals	11	8	4	18	7	5

## Step 4: Compare Offered Plans

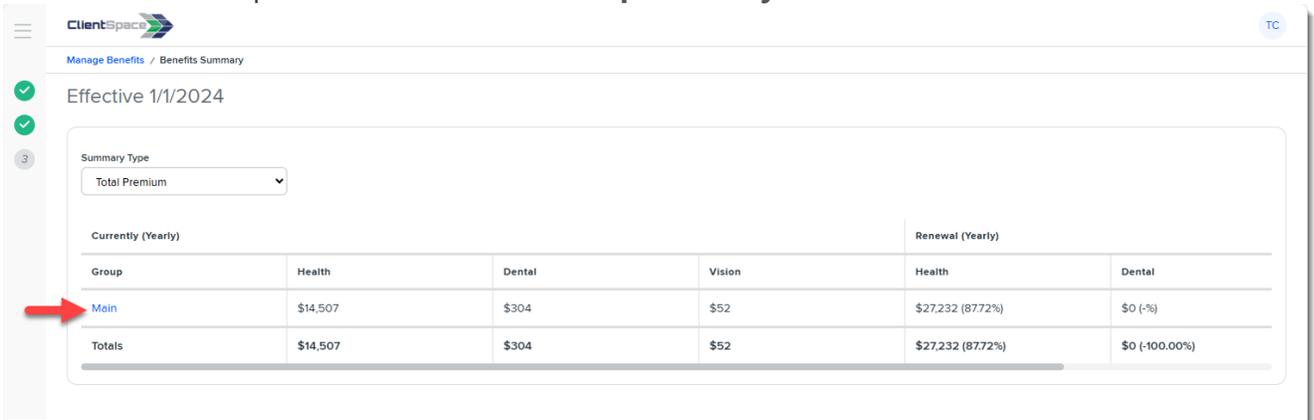
Now it is time to review and compare offered plans.

**ALERT:** Initially, you will see the current plans up for renewal as they are selected by default. This gives you an opportunity to compare these plans before you select any additional available plans.

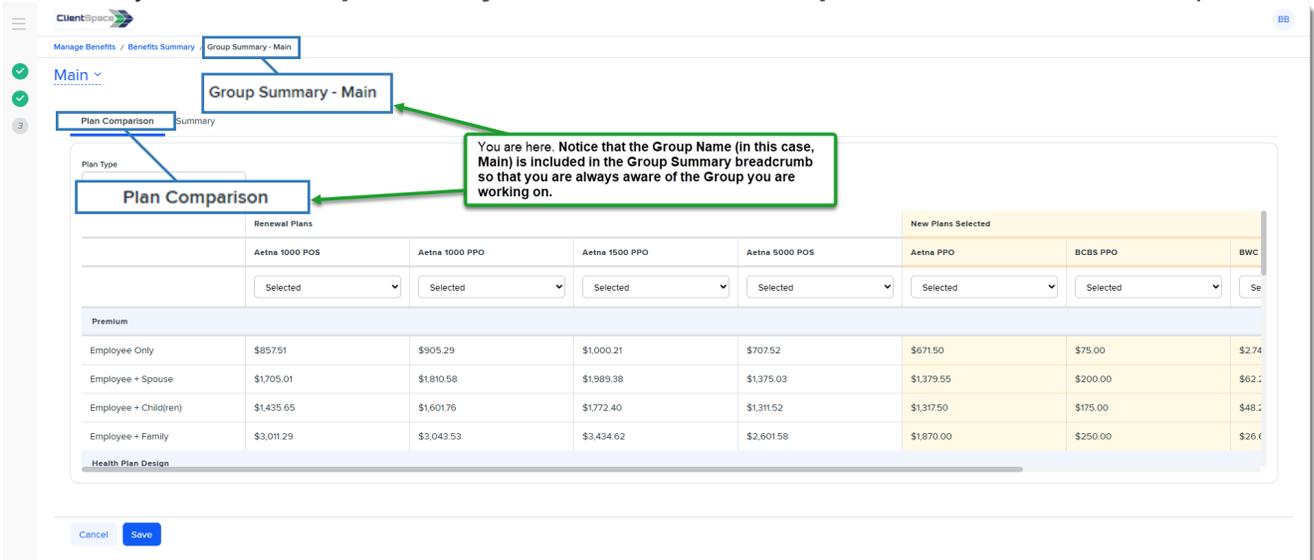
If you later select additional plans, **revisit this step and review the new plans so that you can review contribution methods and edit enrollment counts as necessary.**

**To review and compare offered plans:**

1. Click a Benefit Group name to drill into the **Group Summary** details.



This takes you to the **Group Summary** tab where the **Plan Comparison** sub-tab defaults as open.



You can compare the details of each offered plan by **Plan Type** on the **Group Summary > Plan Comparison** tab. The Plan Details include:

- All premiums for all Coverage Levels as applicable. **Example:** Employee Only, Employee + Spouse, Employee + Child, , Employee + Family, etc.  
**Note:** Coverage Level names may vary from the examples given above.
- Co-pay amounts

- In Network/Out of Network Deductibles
- Out-of-Pocket Maximums

There may also be details for specific services (such as hospitalization or outpatient surgery) as well as additional fields specific to a plan category. For instance, for a Vision Plan, there may be details outlining the coverage for both necessary and elective contact lenses. There are not as many details for supplemental plans. For these plans, typically only the premium amounts display in BPM.

**Note:** You will need to repeat this step for each **Plan Type** by selecting a different option from the **Plan Type** field.

The **Plan Comparison** tab is also where you will select plans. Return to the **Plan Comparison** tab for plan selection once you have reviewed Benefits Summary information and made any changes as necessary to Contribution Methods and/or enrollment counts.

## Step 5: Review the Group Summary

Next, review Group Summary details on the **Summary** tab. This is where you can:

- Compare the **Current** and **Renewal** premiums for the Employee Only (EO) coverage level within a Benefit Group by Plan Type.

**Note:**

- Coverage level names may vary depending on your configuration. The equivalent of the Employee Only (EO) premiums are shown here.
- As covered in the previous section, you can view renewal premiums for all coverage levels included in offered plans on the **Plan Comparison** tab.
- Edit contribution method details and enrollment counts for the selected plans, if necessary.

### Accessing the Group Summary

**To access the group summary:**

1. With the desired group selected, click the **Summary** tab.
2. Then, ensure the desired **Plan Type** is selected.

You are now on the **Group Summary > Summary** tab.

The screenshot displays the 'Group Summary - Standard' page in ClientSpace. The breadcrumb trail is 'Manage Benefits / Benefits Summary / Group Summary - Standard'. The 'Summary' tab is selected. The table below compares 'Current' and 'Renewal' data for the plan 'AETNA MCPOS 2020 -> AETNA MCPOS 2018'.

Plan	Current					Renewal				
	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...
AETNA MCPOS 2020 -> AETNA MCPOS 2018	23	\$500	\$24,176	\$11,507	\$12,669	23	\$563 (12.50%)	\$29,065 (20.22%)	\$12,946 (12.50%)	\$16,119 (27.23%)
<b>TOTALS</b>	<b>23</b>	<b>\$500</b>	<b>\$24,176</b>	<b>\$11,507</b>	<b>\$12,669</b>	<b>23</b>	<b>\$563 (12.50%)</b>	<b>\$29,065 (20.22%)</b>	<b>\$12,946 (12.50%)</b>	<b>\$16,119 (27.23%)</b>

The 'Renewal' column shows an increase in EO Premium, Total Premium, Employer Contribution, and Employee Contribution compared to the 'Current' column. The enrollment counts are identical (23).

## Compare Current and Renewal EO Premiums

### To compare Current and Renewal premiums for EO:

When you first display the **Summary** tab in BPM, for any plan being renewed from the current year's batch, the Current Enrolled Count is the same as the Renewal Enrolled Count.

The enrollment counts may require editing for the renewal plans but for now, let's use them for comparison. We will show you how to edit the Renewal Enrolled Count later in this section.

Initially reviewing the same counts for Current Enrolled Count and Renewal Enrolled Count allows you to compare "apples to apples" when evaluating percentages of increase or decrease in premiums and contributions from the Current year to the Renewal year.

**Note:** If any of the plans being offered in the renewal years are new plans, the percentage of increase or decrease is not calculated for those since there is no Current Year data to use for comparison calculations.

In the example below, there is a current plan being offered for renewal. By having the current and renewal enrollment the same, you can see the percentage of increase from the current year to the renewal year in EO Premium, Total Premium, Employer Contribution, and Employee contribution. This is highlighted below:

Plan	Current					Renewal				
	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...
AETNA MCPOS 2020 -> AETNA MCPOS 2018	23	\$500	\$24,176	\$11,507	\$12,669	23	\$563 (12.50%)	\$29,065 (20.22%)	\$12,946 (12.50%)	\$16,119 (27.23%)
<b>TOTALS</b>	<b>23</b>	<b>\$500</b>	<b>\$24,176</b>	<b>\$11,507</b>	<b>\$12,669</b>	<b>23</b>	<b>\$563 (12.50%)</b>	<b>\$29,065 (20.22%)</b>	<b>\$12,946 (12.50%)</b>	<b>\$16,119 (27.23%)</b>

## Edit Contribution Methods and Enrollment Counts

Now, let's review contribution methods and enrollment counts and edit them if necessary.

### To edit contribution method and enrollment counts:

1. With the desired Group and **Plan Type** still selected on the **Group Summary > Summary** tab, click arrow next to a plan to expand the details.

Plan	Current					Renewal		
	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...	Enrolled	EO Premium	Total Prem
AETNA MCPOS 2020 -> AETNA MCPOS 2018	23	\$500	\$24,176	\$11,507	\$12,669	23	\$563 (12.50%)	\$29,065 (20.22%)
<b>TOTALS</b>	<b>23</b>	<b>\$500</b>	<b>\$24,176</b>	<b>\$11,507</b>	<b>\$12,669</b>	<b>23</b>	<b>\$563 (12.50%)</b>	<b>\$29,065 (20.22%)</b>

2. Review the Contribution Method and the contribution amounts and percentages for each tier, paying particular attention to the Employer Contribution details. In the example below, the employer pays the entire Employee Only premium and a portion of the premium for the remaining tiers:

ClientSpace  
Manage Benefits / Benefits Summary / Group Summary - Standard

Standard

Plan Comparison Summary

Plan Type: Health

Plan	Current						Renewal				
	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...		Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...
AETNA MCPOS 2020 → AETNA MCPOS 2018	23	\$500	\$24,176	\$11,507	\$12,669		23	\$563 (12.50%)	\$29,065 (20.22%)	\$12,946 (12.50%)	\$16,119 (27.23%)

Contribution Method: Total EO Premium

This will determine the contribution method type that is being applied to the premium.

Tier	Current						Renewal				
	Premium	Enrolled Count	Employer Contrib %	Employer Contrib	Employee Contrib	Total Cost Employer	Premium	Enrolled Count	Employer Contrib %	Employer Contrib	Employee Cont
Employee Only	\$500.31	4	100.00%	\$500.31	\$0.00	\$2,001.24	\$562.86 (12.50%)	4	100.00%	\$562.86 12.50%	\$0.00 (-%)
Employee + Spouse	\$1,027.85	5	48.68%	\$500.31	\$527.54	\$2,501.55	\$1,234.50 (20.11%)	5	45.59%	\$562.86 12.50%	\$671.64 (27.32%)
Employee + Child(ren)	\$981.62	6	50.97%	\$500.31	\$481.31	\$3,001.86	\$1,122.56 (14.36%)	6	50.14%	\$562.86 12.50%	\$559.70 (16.29%)

Continue

3. If you want to change the Contribution method:

- a. Open the **Contribution** method drop down list.  
Depending on your selection, **Employer Contrib%** or **Employer Contrib** fields in the grid become editable.
- b. Enter the **Employer Contrib%** or **Employer Contrib** amounts and then click **Save**.

ClientSpace  
Manage Benefits / Benefits Summary / Group Summary - Standard

Standard

Plan Type: Health

Contribution Method

This will determine the contribution method type that is being applied to the premium.

Percentage

- Fixed Dollar Amount
- Percentage
- Total EO Premium
- Match EO Premium
- EO Plus Dep Percentage
- Absorb Increase

Tier	Current						Renewal				
	Premium	Enrolled Count	Employer Contrib %	Employer Contrib	Employee Contrib	Total Cost Employer	Premium	Enrolled Count	Employer Contrib %	Employer Contrib	Employee Cont
Employee Only	\$500.31	4	100.00%	\$500.31	\$0.00	\$2,001.24	\$562.86 (12.50%)	4	100.00%	\$562.86 12.50%	\$0.00 (-%)
Employee + Spouse	\$1,027.85	5	48.68%	\$500.31	\$527.54	\$2,501.55	\$1,234.50 (20.11%)	5	45.59%	\$562.86 12.50%	\$671.64 (27.32%)
Employee + Child(ren)	\$981.62	6	50.97%	\$500.31	\$481.31	\$3,001.86	\$1,122.56 (14.36%)	6	50.14%	\$562.86 12.50%	\$559.70 (16.29%)
Employee + Family	\$1,393.26	8	35.91%	\$500.31	\$892.95	\$4,002.48	\$1,738.23 (24.76%)	8	32.38%	\$562.86 12.50%	\$1,175.37 (31.63%)

Cancel Save

TOTALS	23	\$500	\$24,176	\$11,507	\$12,669		23	\$563 (12.50%)	\$29,065 (20.22%)	\$12,946 (12.50%)	\$16,119 (27.23%)
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1 - 1 of 1 items

Continue

4. If you want to change Renewal **Enrolled Count** values, with the Contribution Method details still expanded, update the **Enrolled Count** fields in the Renewal section for each coverage level as necessary.

**Note:**

- If there are associated child companies, you cannot edit the **Enrolled Count** in BPM. The fields will appear dimmed and unavailable. This is because BPM is aggregating the parent company and child company enrollment counts for you and using this information to recalculate the percentages and other calculations shown.
  - During plan selection, if you select new plans that are not yet listed here, you should return to the **Group Summary > Summary** tab and review/edit the contribution methods and enrollment counts for those plans as well.
5. Repeat these steps to review contribution method and enrollment details for all plans within each **Plan Type**.

## Step 6: Select Plans

Now it is time to make your plan selections. For this, we will stay on the the **Group Summary** tab but return to the **Plan Comparison** sub-tab where you reviewed and compared offered plans in Step 4.

### To select plans:

1. Click the **Group Summary > Plan Comparison** tab.  
At the top of the **Plan Comparison** tab, the renewal plans are grouped under "Renewal Plans" and new plans (if any are being offered) are listed under "Other Available Plans". There are a drop-down lists under each plan with pre-selected values shown:
  - Selected - If a plan has a white background and is in "Selected" status initially, this indicates the plan is a renewal plan (i.e., it is from the current year and is eligible for renewal).
  - New - If a plan is in "New" status initially, this plan is a new plan being offered in the renewal period.

In the example below, there is a renewal plan in "Selected" status and multiple plans in "New" status:

ClientSpace

Manage Benefits / Benefits Summary / Group Summary - Standard

Standard

Plan Comparison Summary

Plan Type  
Health

Renewal Plans → Other Available Plans

	AETNA MCPOS 2018	Aetna 1000 POS	Aetna 1000 PPO	Aetna 1500 PPO	Aetna 5000 POS
	Selected	New	New	New	New
<b>Premium</b>					
Employee Only	\$562.86	\$950.00	\$950.00	\$950.00	\$715.52
Employee + Spouse	\$1,234.50	\$1,800.00	\$1,810.58	\$1,900.00	\$1,475.03
Employee + Child(ren)	\$1,122.56	\$1,500.00	\$1,601.76	\$1,650.00	\$1,511.52
Employee + Family	\$1,738.23	\$3,200.00	\$3,043.53	\$3,200.00	\$2,751.58
<b>In Network</b>					

Cancel Save

2. Make selections using the following guidelines:

- **If you want to proceed with renewing a plan under "Renewal Plans":** Leave it set to "Selected".

Renewal Plans	
Aetna 1000 POS	Aetna 1000 PPO
<input type="text" value="Selected"/> ▼	<input type="text" value="Selected"/> ▼
\$893.00	\$807.50
\$1,705.01	\$1,538.99
\$1,435.65	\$1,361.50
\$3,011.29	\$2,587.00

- **If you want to drop a Renewal Plan:** Click the down arrow and change from "Selected" to "Drop". Notice that the background color of the dropped plan changes to gray.

Renewal Plans	
Aetna 1000 POS	Aetna 1000 PPO
Selected	Drop
	Selected
	Drop
\$893.00	\$807.50
\$1,705.01	\$1,538.99
\$1,435.65	\$1,361.50
\$3,011.29	\$2,587.00

- **If you want to pick a New plan:** Under "Other Available Plans", click the down arrow and change from "New" to "Selected". Notice that the selected "New" plan is added to a "New Plans Selected" section and the background color changes to light orange.

New Plans Selected	Other Available Plans
Aetna 1500 PPO	Aetna 5000 POS
<input type="button" value="Selected"/>	<input type="button" value="New"/>
<input type="button" value="Selected"/>	
<input type="button" value="Reject"/>	
\$950.00	\$715.52
\$1,900.00	\$1,475.03
\$1,650.00	\$1,511.52
\$3,200.00	\$2,751.58

- **If you want to reject a New plan:** Under "Other Available Plans", click the down arrow and change from "New" to "Reject". Notice that the background color of the rejected plan changes to gray.

New Plans Selected	Other Available Plans
Aetna 1500 PPO	Aetna 5000 POS
Selected	Reject
\$950.00	New
\$1,900.00	Selected
\$1,650.00	Reject
\$3,200.00	\$1,475.03
	\$1,511.52
	\$2,751.58

- When you are finished making selections for the currently selected **Plan Type**, click **Save**.

**ALERT:** If you attempt to go to another tab or select a different **Plan Type** without saving your changes, an Unsaved Changes warning message similar to the example below will display. To avoid losing work, click **Cancel** and then click **Save** to save your work.

**Unsaved Changes**

---

You have unsaved changes. Changing the Plan Type will discard these changes. Do you want to continue?

Cancel
Continue

- Repeat the steps in this section to make plan selections for all **Plan Types** in the selected **Group**.

**ALERT:** If you selected any new plans that were not yet listed when you first reviewed offered plans in Step 4, be certain to return to the **Group Summary > Summary** tab and review/edit the contribution methods and enrollment counts for those plans as well and save those changes. In the example below, we added two new offered plans that were not offered in the current renewal year. (This is why no data is shown in the Enrolled, EO Premium, Total Premium, Employer Contrib, and Employee Contrib columns in Current section. No historical data exists.) Be certain to check the contribution methods and enrollment counts on any newly selected plans before you submit your selections.

The screenshot shows the 'Summary' tab of the 'Group Summary - Standard' interface. A table compares 'Current' and 'Renewal' data for three health plans. The 'Current' column shows data for the first plan, while the other two have dashes. The 'Renewal' column shows data for all three plans. A 'TOTALS' row is at the bottom. A 'Continue' button is visible at the bottom left.

Plan	Current					Renewal				
	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...
▶ AETNA MCPOS 2020 --> AETNA MCPOS 2018	23	\$500	\$24,176	\$11,507	\$12,669	23	\$563 (12.50%)	\$29,065 (20.22%)	\$12,946 (12.50%)	\$16,119 (27.23%)
▶ Aetna 1000 POS	-	-	-	-	-	118	\$950 (-%)	\$248,800 (-%)	\$214,330 (-%)	\$34,470 (-%)
▶ Aetna 1500 PPO	-	-	-	-	-	28	\$950 (-%)	\$41,900 (-%)	\$26,600 (-%)	\$15,300 (-%)
<b>TOTALS</b>	<b>23</b>	<b>\$500</b>	<b>\$24,176</b>	<b>\$11,507</b>	<b>\$12,669</b>	<b>169</b>	<b>\$2,463 (392.27%)</b>	<b>\$319,765 (1222.64%)</b>	<b>\$253,876 (2106.25%)</b>	<b>\$65,889 (420.08%)</b>

## Step 7: Work on the Remaining Groups (if Applicable)

If you have more than one Benefit Group in this batch, repeat the following sections for the remaining groups:

- Step 3: Review the Benefits Summary
- Step 4: Compare Offered Plans
- Step 5: Review the Group Summary
- Step 6: Select Plans

## Step 8: Review the Selection Summary and Submit Selections

**ALERT:** Plans for all Benefit Groups in the current batch must be reviewed and your final selections must be made before submitting final selections. Any plans in "New" status that have

not been either selected or rejected will automatically be rejected when you submit final selections.

When you are finished making plan selections for all Plan Types in all Groups, you can review a summary of your selections, add your signature to indicate that you have approved the selections and then finalize the process by submitting the changes.

### To review the selection summary and submit selections:

1. When you are finished making plan selections for all Plan Types in all Groups, with any Group and Plan Type shown (as it does not matter), go to the **Summary** tab and click **Continue**.

The screenshot shows the 'Summary' tab in the ClientSpace application. The 'Plan Type' is set to 'Health'. The table below compares 'Current' and 'Renewal' plan details.

Plan	Current					Renewal				
	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Co...
▶ AETNA MCPOS 2020 → AETNA MCPOS 2018	23	\$500	\$24,376	\$11,507	\$12,669	23	\$563 (12.50%)	\$29,065 (20.22%)	\$12,946 (12.50%)	\$16,119 (27.23%)
▶ Aetna 1000 POS	-	-	-	-	-	118	\$950 (-%)	\$248,800 (-%)	\$214,330 (-%)	\$34,470 (-%)
▶ Aetna 1500 PPO	-	-	-	-	-	28	\$950 (-%)	\$41,900 (-%)	\$26,600 (-%)	\$15,300 (-%)
<b>TOTALS</b>	<b>23</b>	<b>\$500</b>	<b>\$24,376</b>	<b>\$11,507</b>	<b>\$12,669</b>	<b>169</b>	<b>\$2,463 (392.27%)</b>	<b>\$319,765 (1222.64%)</b>	<b>\$253,876 (2106.25%)</b>	<b>\$65,889 (420.08%)</b>

A red box highlights the 'Continue' button at the bottom left, with a red arrow pointing to it.

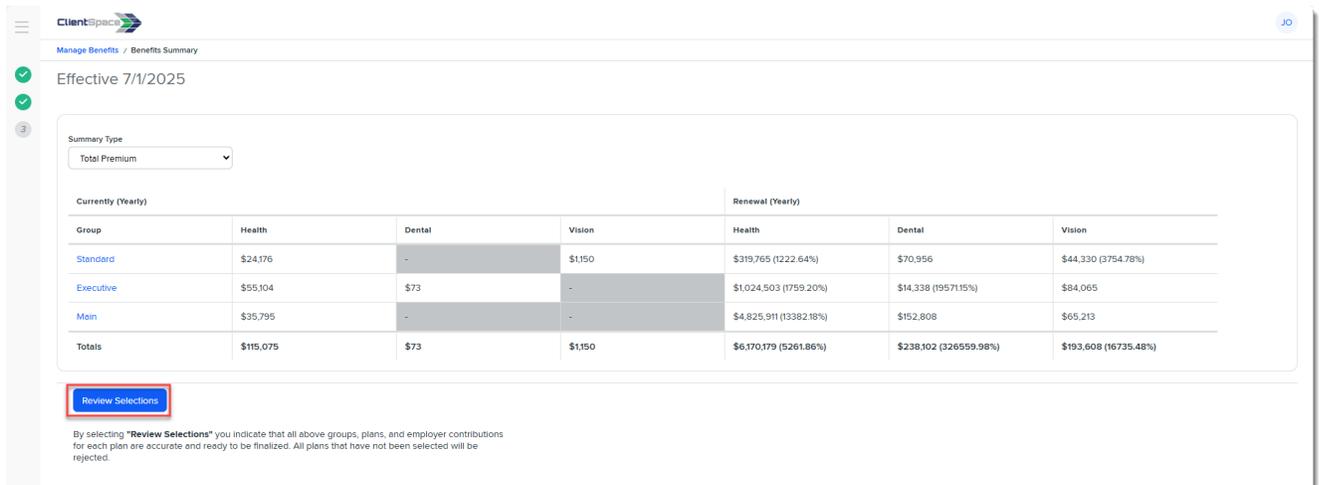
A confirmation message similar to the following displays.

The confirmation dialog box displays the following text:

**peouat.clientspace.net says**  
Are you sure you want to continue?

Buttons: **OK** (blue), **Cancel** (grey)

2. Click **OK** to continue.
3. Click **Review Selections**.



ClientSpace

Manage Benefits / Benefits Summary

Effective 7/1/2025

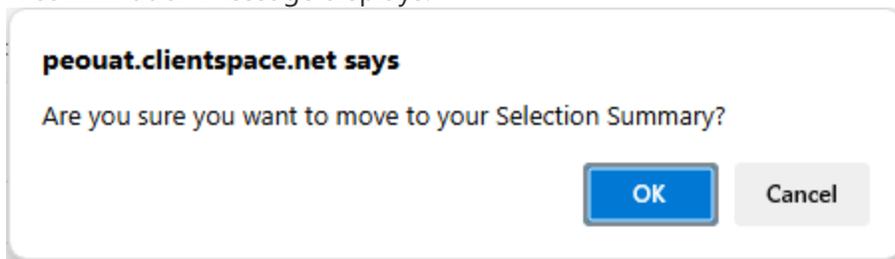
Summary Type  
Total Premium

Group	Currently (Yearly)			Renewal (Yearly)		
	Health	Dental	Vision	Health	Dental	Vision
Standard	\$24,176	-	\$1150	\$319,765 (1222.64%)	\$70,956	\$44,330 (3754.78%)
Executive	\$55,104	\$73	-	\$1,024,503 (1759.20%)	\$14,338 (19571.15%)	\$84,065
Main	\$35,795	-	-	\$4,825,911 (13382.18%)	\$152,808	\$65,213
Totals	\$115,075	\$73	\$1150	\$6,170,179 (5261.86%)	\$238,102 (326559.98%)	\$193,608 (16735.48%)

**Review Selections**

By selecting "Review Selections" you indicate that all above groups, plans, and employer contributions for each plan are accurate and ready to be finalized. All plans that have not been selected will be rejected.

A confirmation message displays.



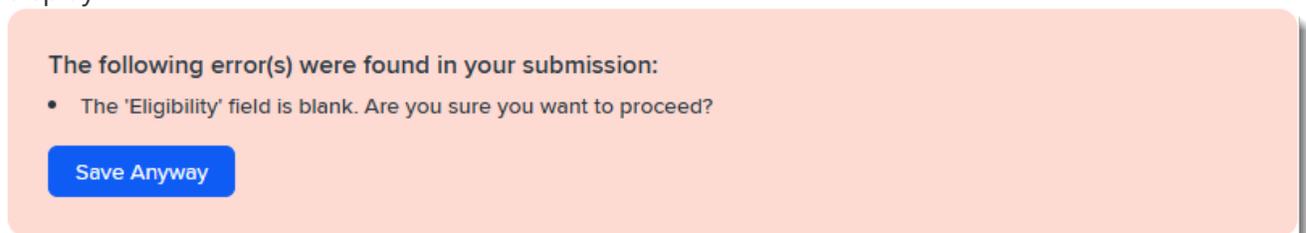
**peouat.clientspace.net says**

Are you sure you want to move to your Selection Summary?

OK Cancel

4. Click **OK**.

**Note:** BPM checks for any errors. If errors are found, a message similar to the following may display.



The following error(s) were found in your submission:

- The 'Eligibility' field is blank. Are you sure you want to proceed?

Save Anyway

If the error is not critical, you can click **Save Anyway** to continue or you can correct the errors and re-initiate the "Review Selection Summary" process once errors are reviewed and corrected.

The Selection Summary window displays.

**ClientSpace**

Selection Summary

Client Name: GWEN'S GADGET COMPANY LLC

Client ID: 106

Affiliated: [Click HERE to see the list](#)

Benefit Contact: James OSHA

HSA Contribution Offered: No

FSA Contribution Offered: No

Commuter Plan Offered: No

Client's Signature:  Use Signature

Sign above

All Health Dental Vision

Benefit Group	Carrier	Plan ID	Effective Date	Premium				Contribution (Employer / Employee)			
				Employee Only	Employee + Spouse	Employee + Child(ren)	Family	Employee Only	Employee + Spouse	Employee + Child(ren)	Family
<b>Health</b>											

Cancel Finalize

- On the Selection Summary window, before you finalize your selections, you can:
  - Scroll to the tabbed sections near the bottom of the screen and review selections for each Benefit Group:

**ClientSpace**

Selection Summary

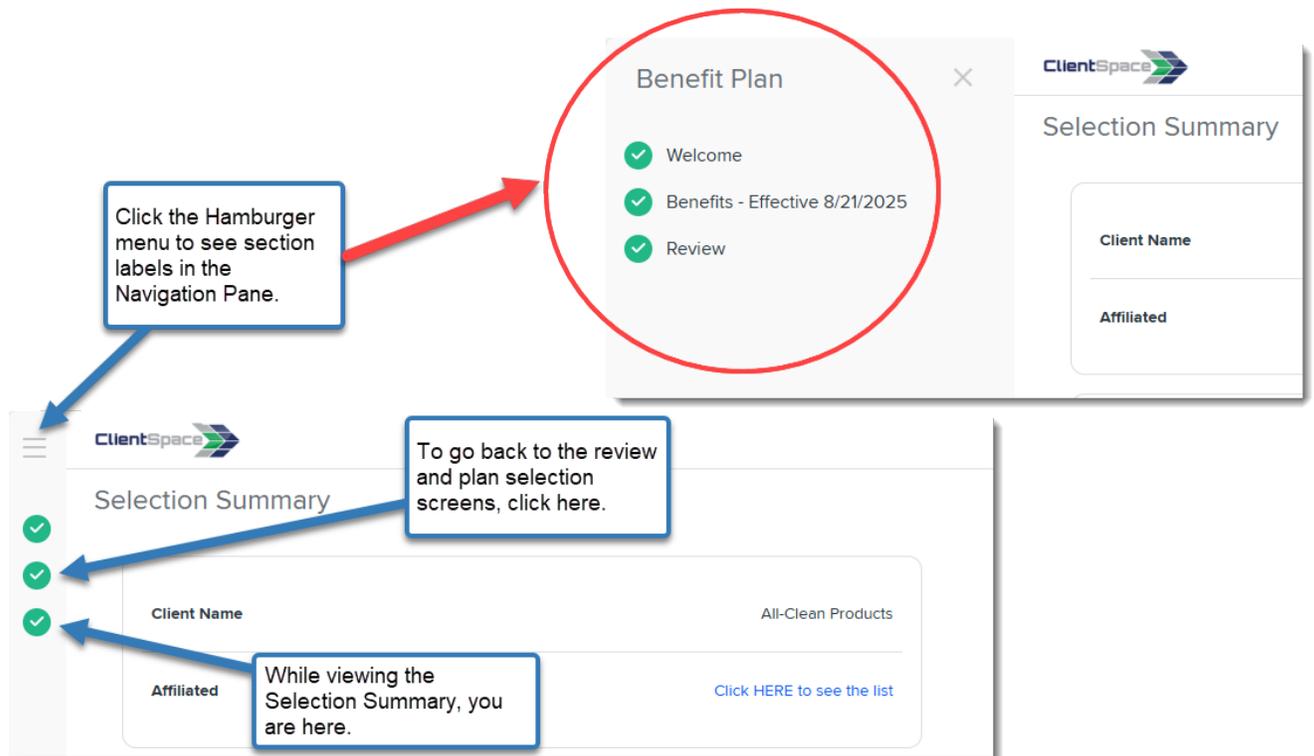
All Dental Health LTD - Company Paid STD - Company Paid Vision

Selection Summary Tabs

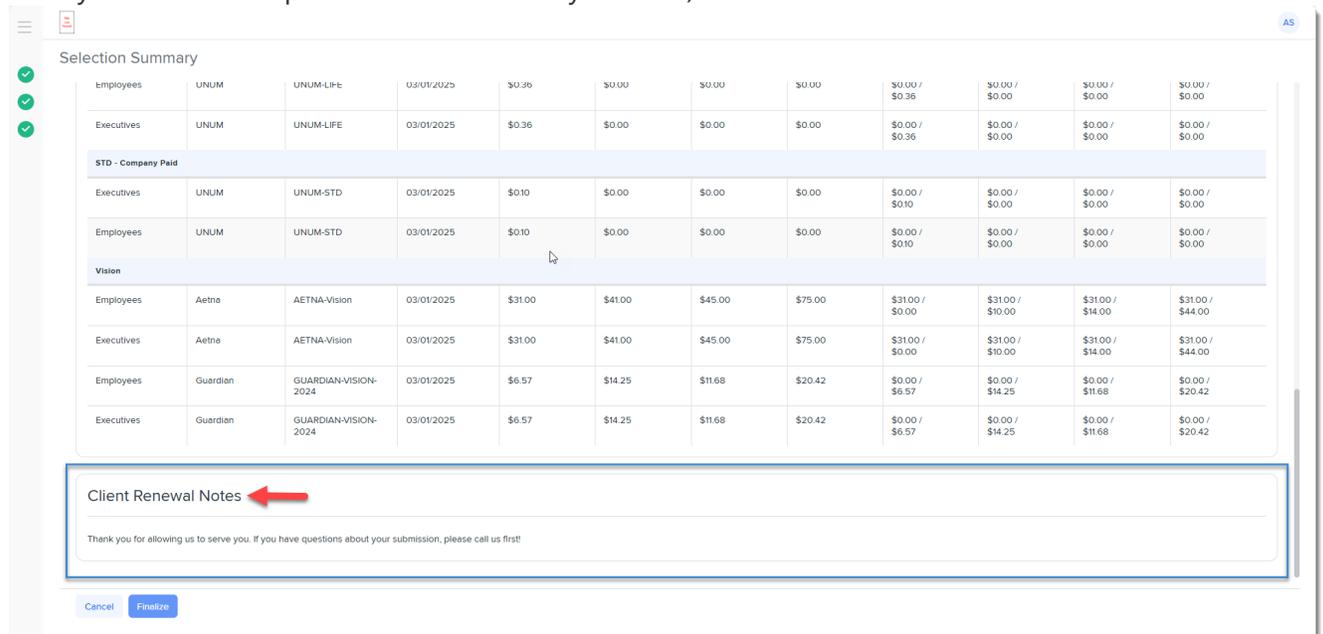
Benefit Group	Carrier	Plan ID	Effective Date	Premium				Contribution (Employer / Employee)			
				Employee Only	Employee + Spouse	Employee + Child(ren)	Family	Employee Only	Employee + Spouse	Employee + Child(ren)	Family
<b>Dental</b>											
Main	BCBS FL	503DENTAL	09/01/2025	\$10.00	\$20.00	\$30.00	\$40.00	\$10.00 / \$0.00	\$19.50 / \$0.50	\$29.00 / \$1.00	\$38.50 / \$1.50
Main	BCBS FL	Dental-BASICPLUS	09/01/2025	\$20.00	\$39.00	\$43.00	\$70.00	\$20.00 / \$0.00	\$20.00 / \$19.00	\$20.00 / \$23.00	\$20.00 / \$50.00
Main	BCBS FL	Dental-BASIC	09/01/2025	\$15.00	\$32.00	\$37.00	\$60.00	\$15.00 / \$0.00	\$15.00 / \$17.00	\$15.00 / \$22.00	\$15.00 / \$45.00
<b>Health</b>											
Main	Aetna	5000POS	09/01/2025	\$850.26	\$1400.00	\$1400.52	\$2705.33	\$850.26 / \$0.00	\$732.49 / \$667.51	\$796.52 / \$604.00	\$811.27 / \$1894.06
Main	Aetna	AGT2	09/01/2025	\$190.00	\$410.00	\$480.00	\$870.00	\$0.00 / \$190.00	\$0.00 / \$410.00	\$0.00 / \$480.00	\$0.00 / \$870.00
Main	Aetna	1000POS	09/01/2025	\$893.00	\$1905.01	\$1470.65	\$3500.29	\$893.00 / \$0.00	\$1095.40 / \$809.61	\$1008.53 / \$462.12	\$1414.46 / \$2085.83
<b>LTD - Company Paid</b>											
FULL TIME EMPLOYEES	Zurich	LTD180	09/01/2025	\$0.29	\$0.00	\$0.00	\$0.00	\$0.29 / \$0.00	\$0.00 / \$0.00	\$0.00 / \$0.00	\$0.00 / \$0.00
<b>STD - Company Paid</b>											

Cancel Finalize

**Note:** If you need to make a correction, go back to a prior section using the left navigation panel. Click the second green check mark to go back to the plan review and plan selection screens.



- View Client Renewal notes, if present. (There could be special instructions or a general note from your Benefits Representative listed for you here.)



- Click the link in the **Affiliated** section to view the list of related child companies, if applicable.

The screenshot shows the ClientSpace interface. On the left is a sidebar with three green checkmarks. The main content area is titled 'Selection Summary'. It contains a form with the following fields:

- Client Name:** All-Clean Products
- Affiliated:** Click HERE to see the list (indicated by a red arrow)

(This is the same list that can be accessed from the Welcome page. This is mentioned in [Step 2: Open the Batch](#).)

- When you are certain of your selections, sign the Selection Summary.
  - If you can sign your signature:** If you have a signature pad, touch pad or wish to use your mouse to sign your signature, click **Use Signature**, sign your name electronically above the dotted gray line, and click **Accept**.

The screenshot shows the 'Client's Signature' section. It includes a signature pad with the handwritten name 'Jim Ellison'. A red box highlights the 'Use Signature' toggle switch, which is turned on. A blue box with an arrow points to the dotted gray line below the signature, with the text 'Be sure to sign above the dotted gray line.' A blue 'Accept' button is visible at the bottom right.

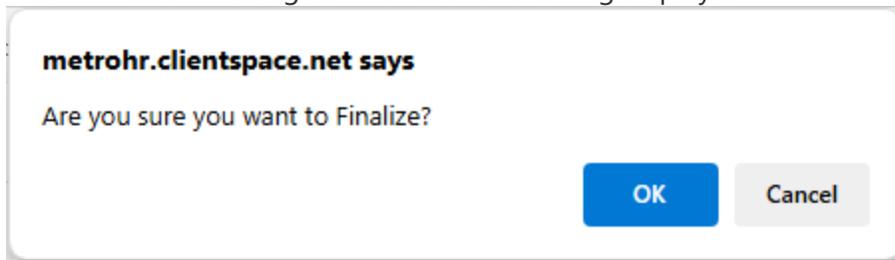
- If you cannot sign your signature, type it instead:** Ensure that **Use Signature** is not

selected, type your signature in the space provided, and click **Accept**.



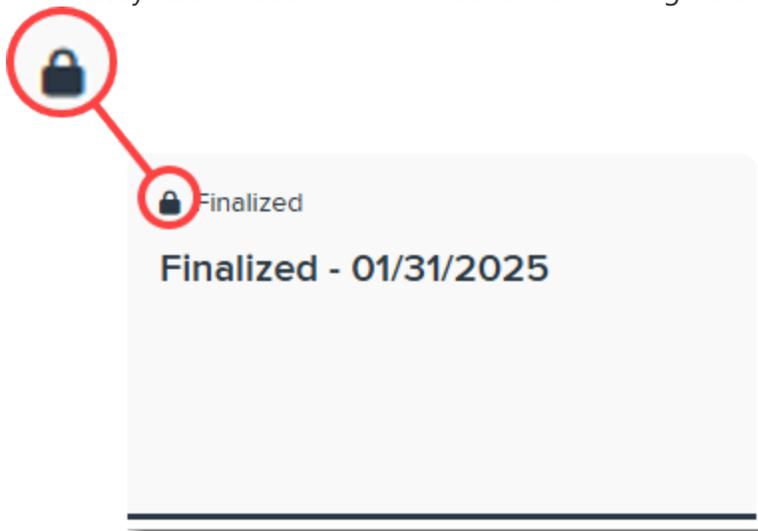
The image shows a dialog box titled "Client's Signature". In the top right corner, there is a toggle switch labeled "Use Signature" which is currently turned off. Below the title, there is a text input field labeled "Type Signature" containing the text "Jim Ellison". In the bottom right corner of the dialog, there is a blue button labeled "Accept".

7. Click **Finalize** at the bottom of the Selection Summary.  
A confirmation message similar to the following displays:



The image shows a confirmation dialog box. At the top, it says "metrohr.clientspace.net says". Below that, it asks "Are you sure you want to Finalize?". At the bottom right, there are two buttons: a blue "OK" button and a grey "Cancel" button.

8. Click **OK** to continue.  
You are returned to the BPM Welcome page where the Benefits Batch card displays "Finalized".  
The lock symbol indicates that this batch can no longer be opened.



Please contact your Benefits Representative immediately if you have submitted in error and need to make changes.

## Chapter 3

# Using BPM with No Prior Batch History

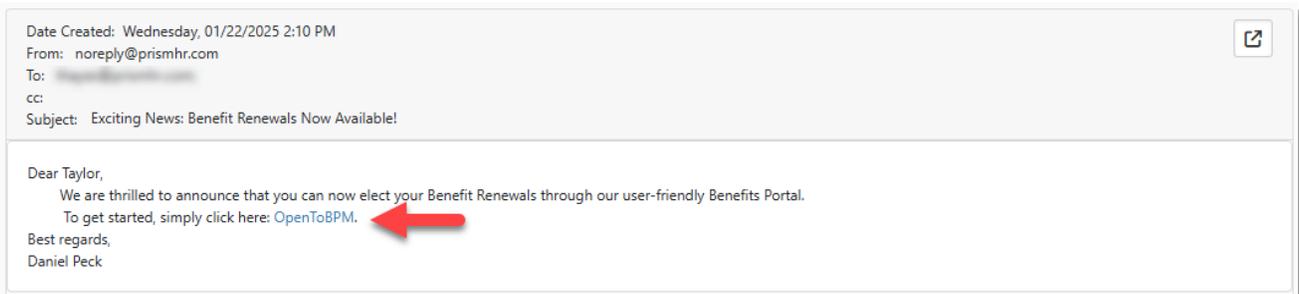
If you are a first time customer, you are in the right place! As a first time customer, you will not have prior batch data that we can draw from to present you with batch comparison data of the currently active plans to the offered plans up for renewal. As such, the screens have been streamlined to only display offered plans.

## Option 2: Reviewing, Selecting, and Approving Benefits - No Prior Batch History

### Step 1: Log in to BPM

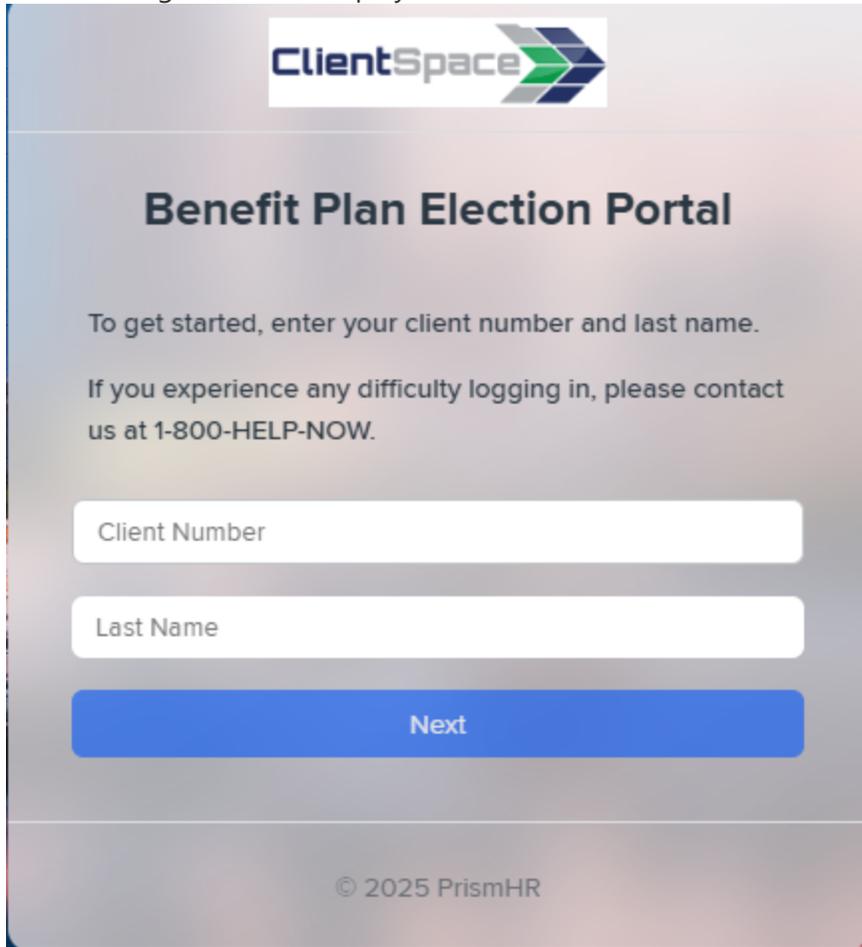
When offered benefits are ready to review, you will receive an email similar to below announcing that benefits are ready to review in the Benefit Plan Manager (BPM) portal. The email will contain a link to access the portal.

**Note:** Some of the verbiage and design elements in the example images displayed here will vary slightly from your actual screens due to differences in software configuration. However, the functionality is the same.



**To log in to BPM:**

1. Open the email announcing that benefits are ready for your review and click the link to open BPM. The BPM Login Window displays.



The screenshot shows the ClientSpace Benefit Plan Election Portal login window. At the top is the ClientSpace logo. Below it is the title "Benefit Plan Election Portal". The instructions read: "To get started, enter your client number and last name. If you experience any difficulty logging in, please contact us at 1-800-HELP-NOW." There are two input fields: "Client Number" and "Last Name". Below these is a blue "Next" button. At the bottom, it says "© 2025 PrismHR".

2. Enter your **Client Number** and **Last Name** and then click **Next**. The Account Access Confirmation window displays.

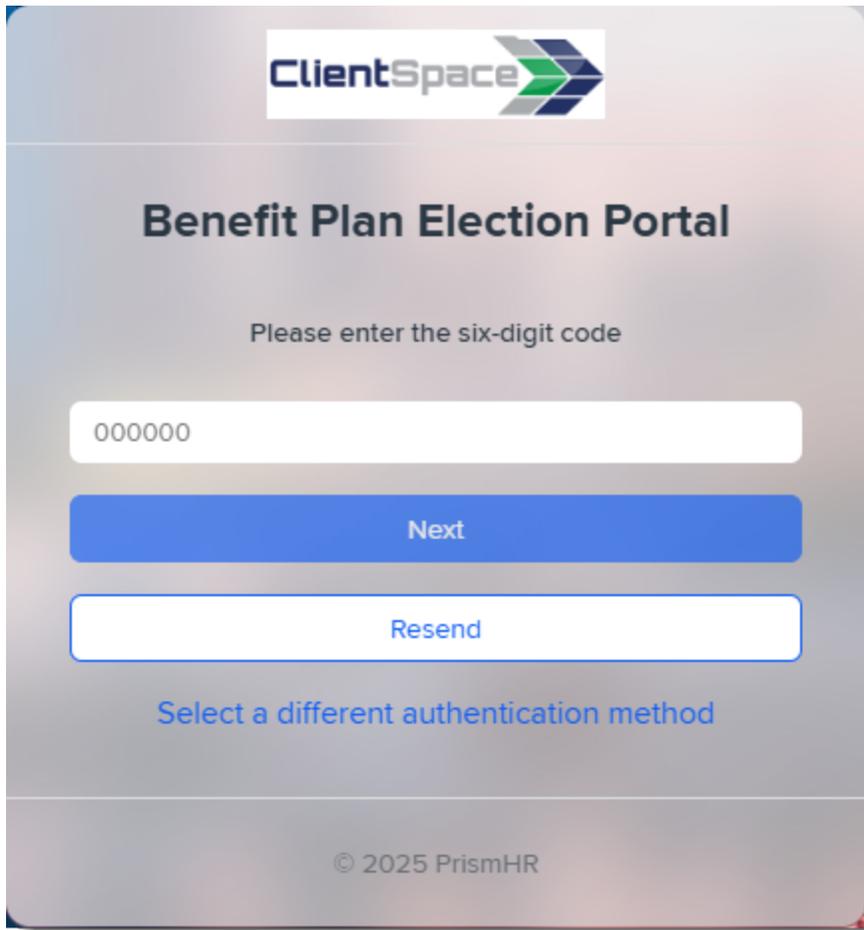
**Note:** If you do not know your **Client Number**, contact your Benefits Representative.

3. Click the option to send the code to either your mobile phone number or email address and then click **Send Verification Code**. A data entry field displays for entering the code.

**Note:** You must use the mobile phone number or email address that your Benefits Representative has on file for you.

The screenshot shows a mobile application interface for ClientSpace. At the top is the ClientSpace logo. Below it is the title "Benefit Plan Election Portal" and a subtitle "Account Access Confirmation". The main instruction is "Select an option below to receive your verification code." There are two radio button options: "Send email to: g\*\*\*\*p@p\*\*\*\*\*r.com" (which is selected) and "Send SMS/Text Msg to: (3\*\*) \*\*\*-\*\*\*\*0". Below the options is the text "Message and data rates may apply". A large blue button labeled "Send Verification Code" is centered at the bottom. At the very bottom of the screen is the copyright notice "© 2025 PrismHR".

4. Once you receive the code, enter it in the space provided and click **Next**.  
**Note:** Additional options display on this screen for resending the code or selecting a different authentication method. If you select the option to use a different authentication method, you are returned to the Account Access Confirmation window. The only two options are email or SMS/Text Msg to your mobile phone and you can select the alternative option if the first option failed. For instance, if you were unable to receive a verification code via email, select the SMS/Text Msg option to receive the verification code via text your mobile phone number.

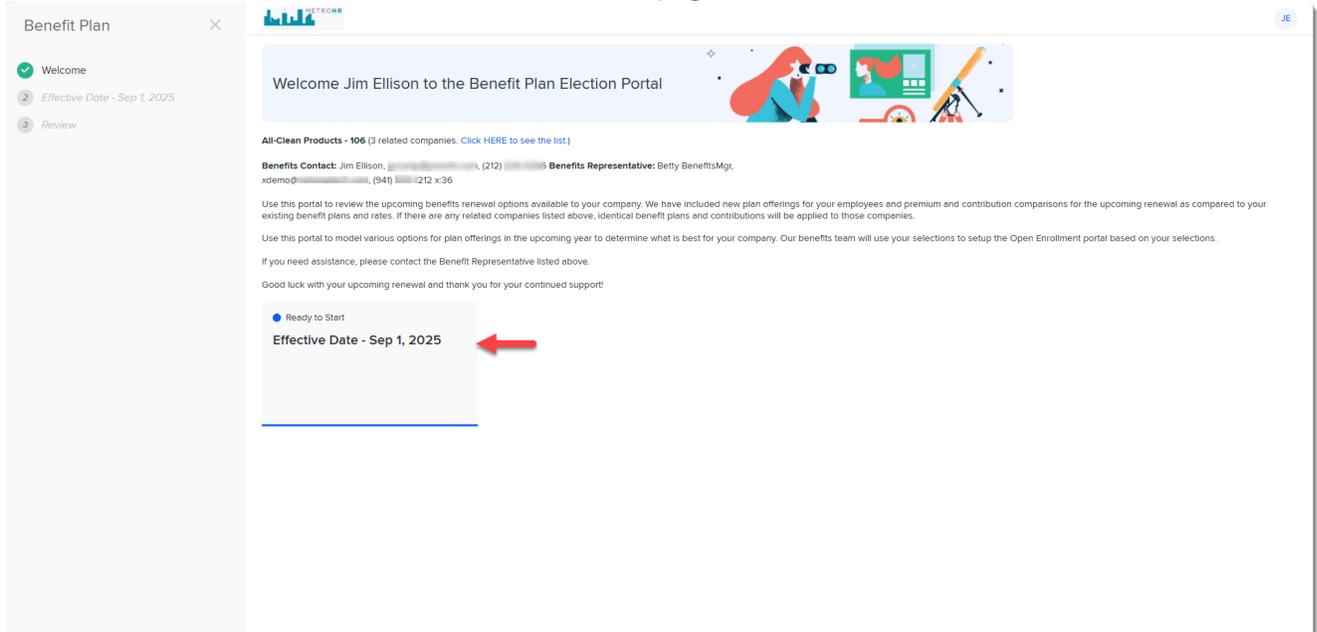


After successful authentication of the verification code, the BPM Welcome page displays.

## Step 2: Open the Batch

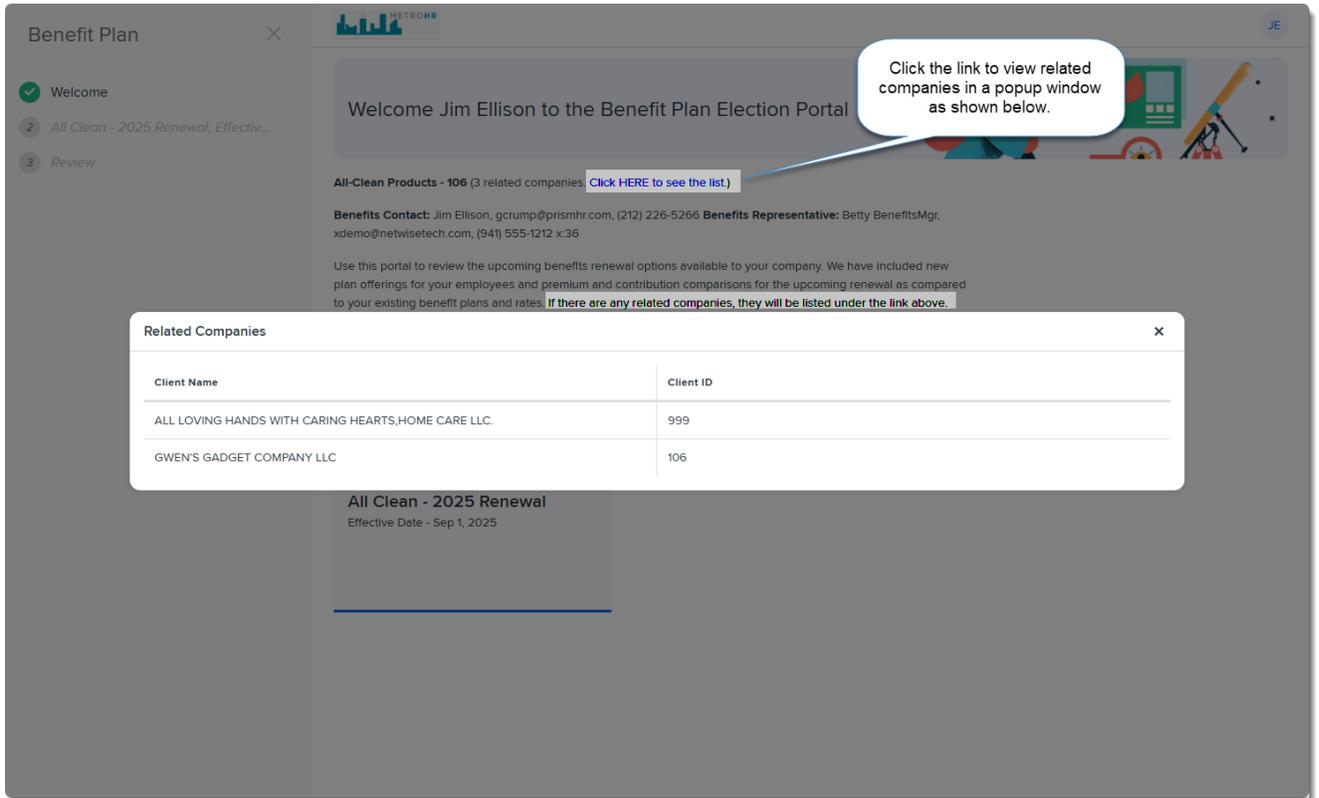
### To open the batch:

1. Click the Benefits Batch card on the BPM Welcome page.

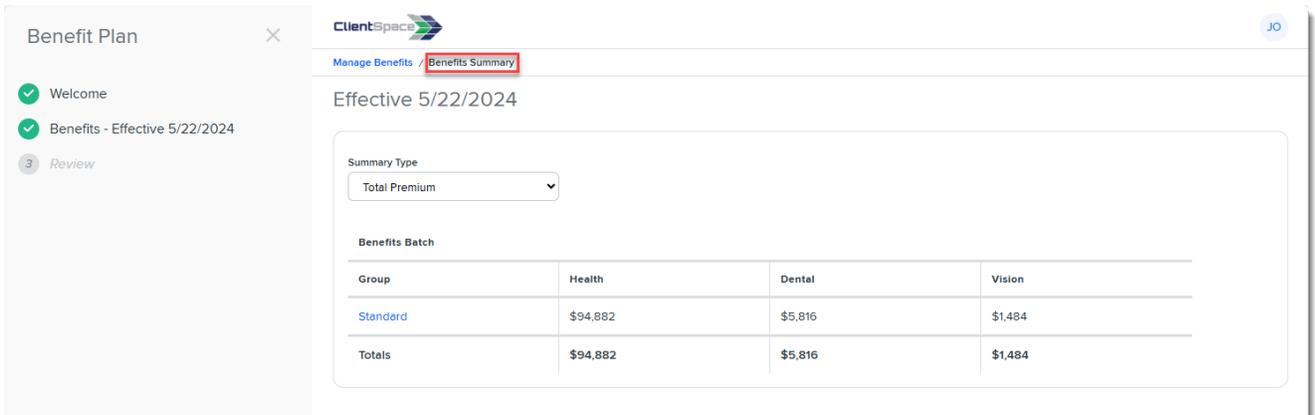


The screenshot displays the 'Benefit Plan Election Portal' interface. On the left, a sidebar shows a progress indicator with three steps: 'Welcome' (checked), 'Effective Date - Sep 1, 2025' (selected), and 'Review'. The main content area features a welcome message for 'Jim Ellison' and provides contact information for the Benefits Representative, Betty BenefitsMgr. A red arrow points to a card titled 'Effective Date - Sep 1, 2025' which is currently selected.

**Note:** If your company is a parent company and you have related child companies, you may also see a **Related Companies** link on the Welcome Page next to the Client Name and Client Number.



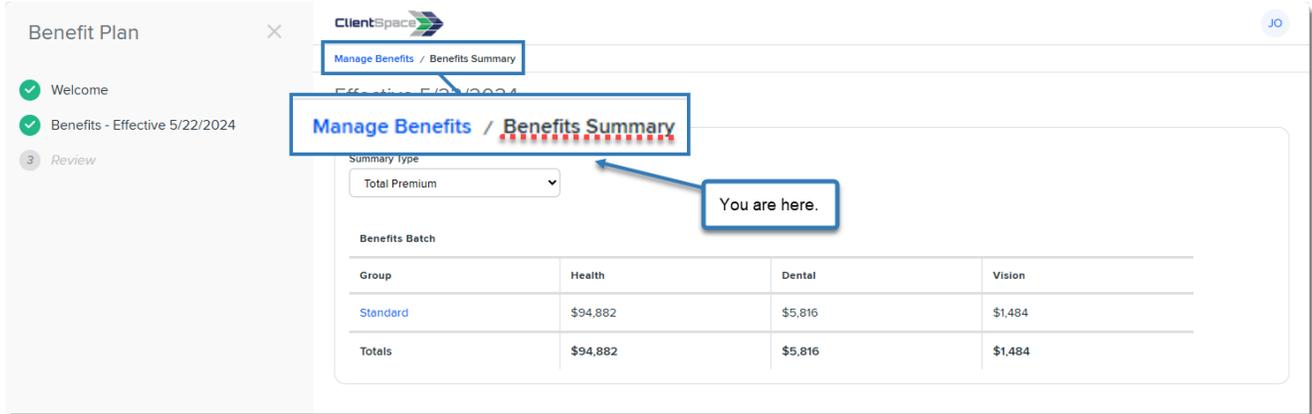
Click the link to display the related companies. The batch opens to the **Benefits Summary** tab and displays a summary of the offered benefits in this benefits batch.



**Tip:** Clicking **Manage Benefits** or **Welcome** in the navigation pane takes you back to the Welcome page.

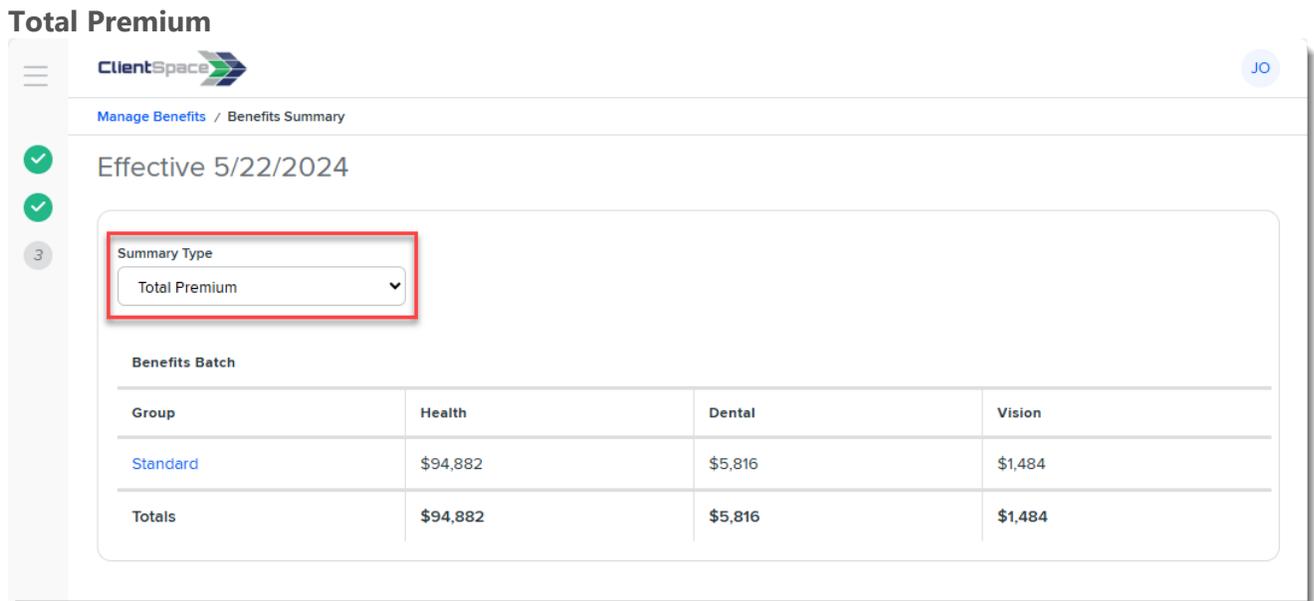
### Step 3: Review the Benefits Summary

Once you open the batch, you are on the **Benefits Summary** tab where you can review **Benefits Summary** details.



To review the benefits summary:

1. On the **Benefits Summary** tab, review the Benefits Batch summary details. Change the **Summary Type** view from the default of Total Premium to other available views: Employer Contribution, Employee Contribution, and Enrolled Count.



### Employer Contribution

ClientSpace

Manage Benefits / Benefits Summary

Effective 5/22/2024

Summary Type  
Employer Contribution

Benefits Batch

Group	Health	Dental	Vision
Standard	\$83,222	\$4,857	\$1,298
<b>Totals</b>	<b>\$83,222</b>	<b>\$4,857</b>	<b>\$1,298</b>

### Employee Contribution

ClientSpace

Manage Benefits / Benefits Summary

Effective 5/22/2024

Summary Type  
Employee Contribution

Benefits Batch

Group	Health	Dental	Vision
Standard	\$11,660	\$959	\$186
<b>Totals</b>	<b>\$11,660</b>	<b>\$959</b>	<b>\$186</b>

**Enrolled Count**

ClientSpace

Manage Benefits / Benefits Summary

Effective 5/22/2024

Summary Type  
Enrolled Count

**Benefits Batch**

Group	Health	Dental	Vision
Standard	58	147	113
<b>Totals</b>	<b>58</b>	<b>147</b>	<b>113</b>

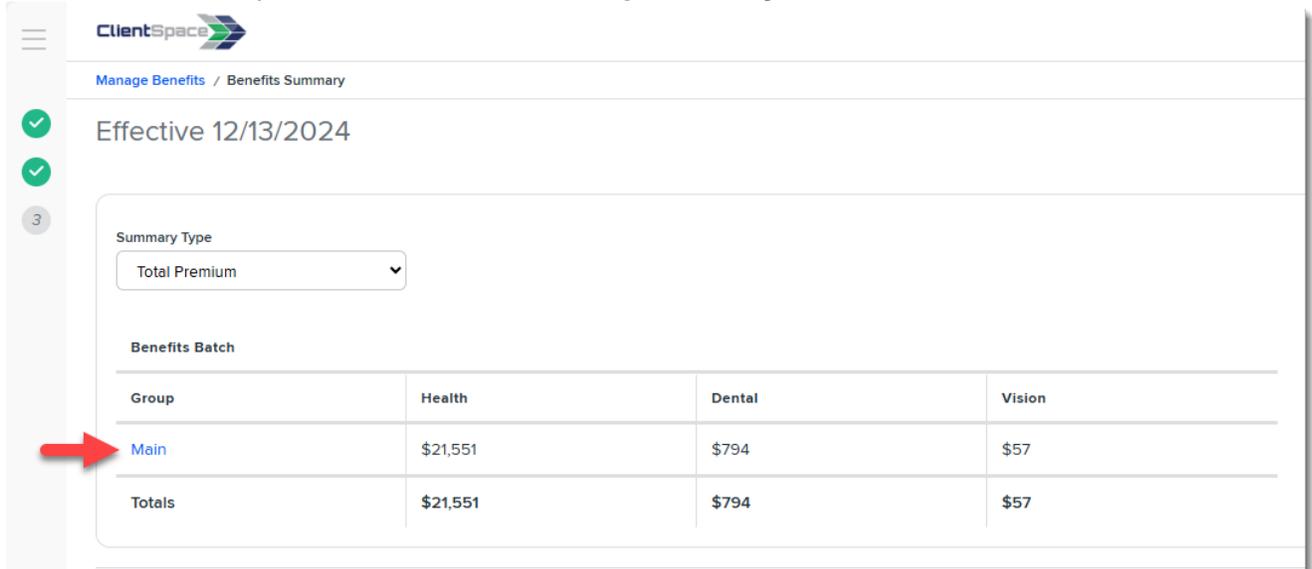
## Step 4: Review and Select Offered Plans

Since this is your first time selecting plans and you have no current plans. If you had some current plans up for renewal, they would already be in a "Selected" status and you would be able to see current year and renewal year summary details and make some initial comparisons on the renewing plans. Since you do not have that, you need to review the available plans first and at least tentatively select some plans on the **Plan Comparison** tab before you can review summary details such as contribution methods and enrollment counts.

## Reviewing Plans

### To review and compare offered plans:

1. Click a Benefit Group name to drill into the **Group Summary** details.



ClientSpace

Manage Benefits / Benefits Summary

Effective 12/13/2024

Summary Type  
Total Premium

Benefits Batch

Group	Health	Dental	Vision
Main	\$21,551	\$794	\$57
Totals	\$21,551	\$794	\$57

This takes you to the **Group Summary** tab where the **Plan Comparison** sub-tab defaults as open.

ClientSpace

Manage Benefits / Benefits Summary / Group Summary - Main

Main > Group Summary - Main > Plan Comparison

Health

Available Plans

	Aetna 1000 POS	Aetna 1000 PPO	Aetna 1500 PPO	Aetna 5000 POS
	New	New	New	New
<b>Premium</b>				
Employee Only	\$893.00	\$950.00	\$237.50	\$715.52
Employee + Spouse	-	\$1,810.58	\$475.00	\$1,475.03
Employee + Child(ren)	-	\$1,601.76	\$412.50	\$1,511.52
Employee + Family	-	\$3,043.53	\$800.00	\$2,751.58
<b>In Network</b>				

Cancel Save

You are here. Notice that the Group Name (in this case, Main) is included in the Group Summary breadcrumb so that you are always aware of the Group you are working on.

You can compare the details of each offered plan by **Plan Type** on the **Group Summary > Plan Comparison** tab. The Plan Details include:

- All premiums for all Coverage Levels as applicable. **Example:** Employee Only, Employee + Spouse, Employee + Child, Employee + Family, etc.  
**Note:** Coverage Level names may vary from the examples given above.
- Co-pay amounts
- In Network/Out of Network Deductibles
- Out-of-Pocket Maximums

There may also be details for specific services (such as hospitalization or outpatient surgery) as well as additional fields specific to a plan category. For instance, for a Vision Plan, there may be details outlining the coverage for both necessary and elective contact lenses. There are not as many details for supplemental plans. For these plans, typically only the premium amounts display in BPM.

**Note:** You will need to repeat this step for each **Plan Type** by selecting a different option from the **Plan Type** field.

The **Plan Comparison** tab is also where you will select plans. Return to the **Plan Comparison** tab for plan selection once you have reviewed Benefits Summary information and made any changes as necessary to Contribution Methods and/or enrollment counts.

### Selecting Plans

**Remember:** It is OK to tentatively select plans and later make changes prior to submission as long as you review the Group Summary details and make any necessary changes or corrections to contribution methods and/or enrollment counts prior to submission. (This process is covered in Step 5.)

#### To select plans:

1. While still on the **Group Summary > Plan Comparison** tab and the desired **Plan Type** selected, at the top of the **Plan Comparison** tab, notice that all of the plans are grouped under "Available Plans" in "New" status.

The screenshot shows the ClientSpace interface for Plan Comparison. The 'Plan Type' is set to 'Health'. A red box highlights the 'Available Plans' section, which includes four plan options: Aetna 1000 POS, Aetna 1000 PPO, Aetna 1500 PPO, and Aetna 5000 POS. Each plan has a 'New' status dropdown menu. Below this, a 'Premium' table lists various plan options and their corresponding costs.

Premium				
	Aetna 1000 POS	Aetna 1000 PPO	Aetna 1500 PPO	Aetna 5000 POS
Employee Only	\$893.00	\$950.00	\$237.50	\$715.52
Employee + Spouse	-	\$1,810.58	\$475.00	\$1,475.03
Employee + Child(ren)	-	\$1,601.76	\$412.50	\$1,511.52
Employee + Family	-	\$3,043.53	\$800.00	\$2,751.58

At the bottom of the interface, there are 'Cancel' and 'Save' buttons.

2. Make selections using the following guidelines:

- **If you want to select a New plan:** Click the down arrow and change from "New" to "Selected".
- **If you want to reject a New plan:** Click the down arrow and change from "New" to "Reject". Notice that the background color of the rejected plan changes to gray.

ClientSpace

Manage Benefits / Benefits Summary / Group Summary - Main

Main

Plan Comparison Summary

Plan Type: Health

	Aetna 1000 POS	Aetna 1000 PPO	Aetna 1500 PPO	Aetna 5000 POS
	Reject	Selected	Selected	Reject
<b>Premium</b>				
Employee Only	\$893.00	\$950.00	\$237.50	\$1,475.03
Employee + Spouse	-	\$1,810.58	\$475.00	\$1,511.52
Employee + Child(ren)	-	\$3,043.53	\$800.00	\$2,751.58
Employee + Family	-			
<b>In Network</b>				

Cancel Save

3. When you are finished making selections for the currently selected **Plan Type**, click **Save**.

ClientSpace  
Manage Benefits / Benefits Summary / Group Summary - Main

Main

Plan Comparison Summary

Plan Type  
Health

Available Plans

	Aetna 1000 POS	Aetna 1000 PPO	Aetna 1500 PPO	Aetna 5000 POS
	Reject	Selected	Selected	Reject

Premium

	Aetna 1000 POS	Aetna 1000 PPO	Aetna 1500 PPO	Aetna 5000 POS
Employee Only	\$893.00	\$950.00	\$237.50	\$715.52
Employee + Spouse	-	\$1,810.58	\$475.00	\$1,475.03
Employee + Child(ren)	-	\$1,601.76	\$412.50	\$1,511.52
Employee + Family	-	\$3,043.53	\$800.00	\$2,751.58

In Network

Cancel Save

**ALERT:** If you attempt to go to another tab or select a different **Plan Type** without saving your changes, an Unsaved Changes warning message similar to the example below displays. To avoid losing work, click **Cancel** and then click **Save** to save your work.

Unsaved Changes

You have unsaved changes. Changing the Plan Type will discard these changes. Do you want to continue?

Cancel Continue

- Repeat the steps in this section to make plan selections for all **Plan Types** in the selected **Group**.

## Step 5: Review the Group Summary

Next, review Group Summary details on the **Summary** tab. This is where you can:

- Review the Available Plan premiums for the Employee Only (EO) coverage level within a Benefit Group by Plan Type.

**Note:**

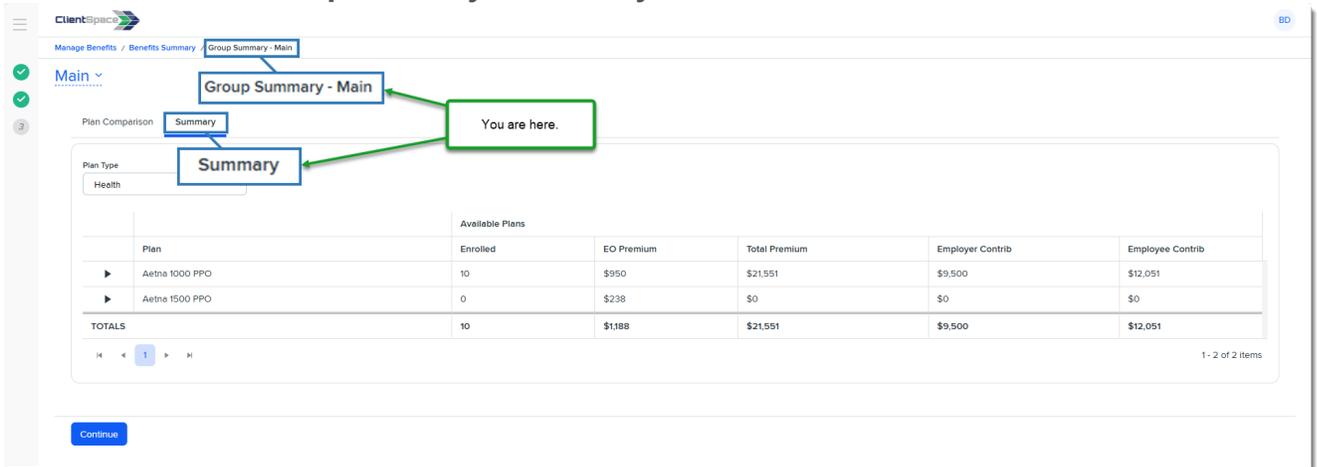
- Coverage level names may vary depending on your configuration. The equivalent of the Employee Only (EO) premiums are shown here.
- As covered in the previous section, you can view renewal premiums for all coverage levels included in offered plans on the **Plan Comparison** tab.
- Edit contribution method details and enrollment counts for the selected plans, if necessary.

### Accessing the Group Summary

**To access the group summary:**

1. With the desired group selected, click the **Summary** tab.
2. Then, ensure the desired **Plan Type** is selected.

You are now on the **Group Summary > Summary** tab.

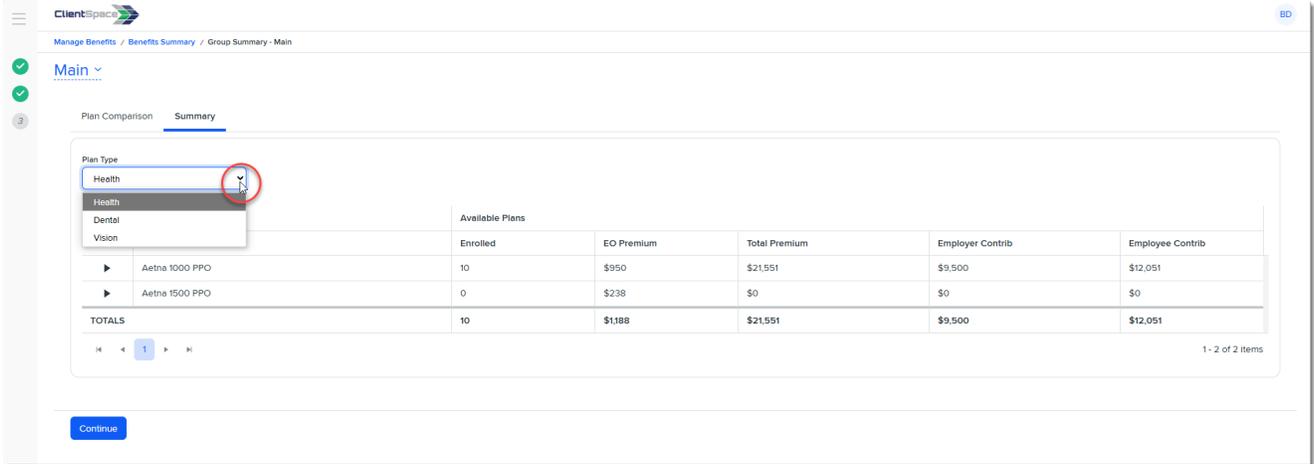


### Review EO Premiums

**To review EO Premiums:**

1. On the **Group Summary > Summary** tab, select each **Plan Type** and evaluate each Plan Type's **EO (Employee Only) Premium, Total Premium, Employer Contribution, Employee**

### Contribution and Enrolled Count.

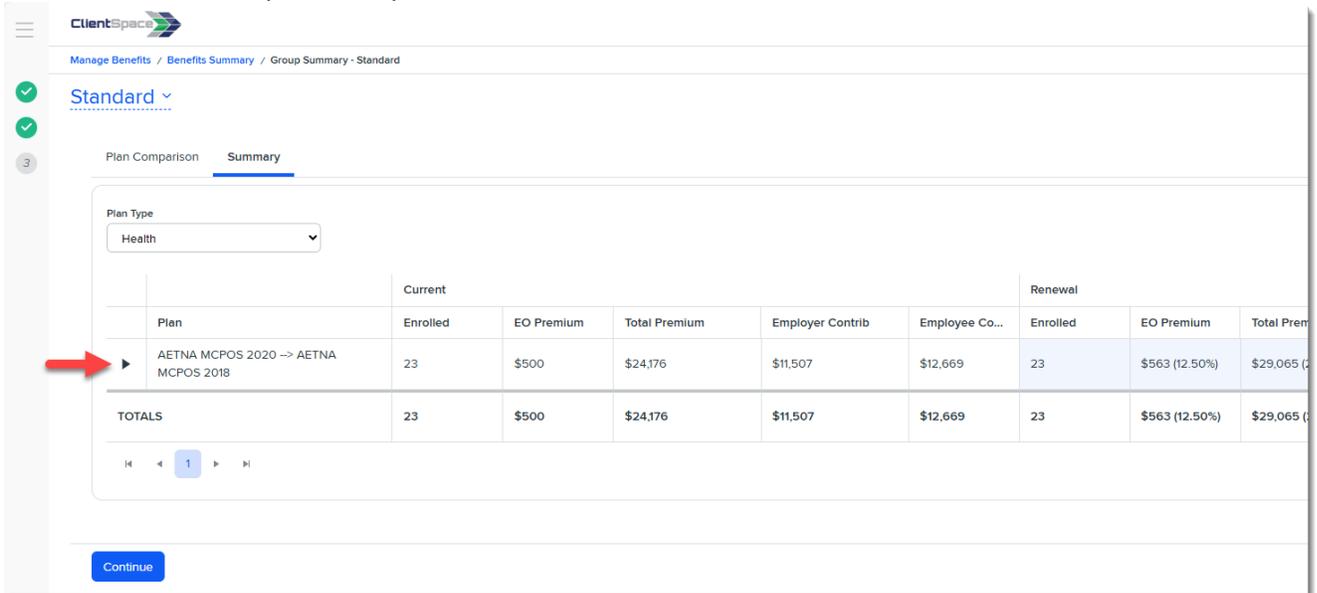


### Edit Contribution Methods and Enrollment Counts

Now, let's review contribution methods and enrollment counts and edit them if necessary.

#### To edit contribution method and enrollment counts:

1. With the desired Group and **Plan Type** still selected on the **Group Summary > Summary** tab, click arrow next to a plan to expand the details.



2. Review the Contribution Method and the contribution amounts and percentages for each tier, paying particular attention to the Employer Contribution details. In the example below, the employer pays the entire Employee Only premium and a portion of the premium for the

remaining tiers:

Plan Comparison Summary

Plan Type: Health

Plan	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Contrib
Aetna 1000 PPO	10	\$950	\$21,551	\$9,500	\$12,051

Contribution Method: Total EO Premium

Tier	Premium	Enrolled Count	Employer Contrib %	Employer Contrib	Employee Contrib	Total Cost Employer
Employee Only	\$950.00	1	100.00%	\$950.00	\$0.00	\$950.00
Employee + Spouse	\$1,810.58	2	52.47%	\$950.00	\$860.58	\$1,900.00
Employee + Child(ren)	\$1,601.76	3	59.31%	\$950.00	\$651.76	\$2,850.00
Employee + Family	\$3,043.53	4	31.21%	\$950.00	\$2,093.53	\$3,800.00

3. If you want to change the Contribution method:

- a. Open the **Contribution** method drop down list.  
Depending on your selection, **Employer Contrib%** or **Employer Contrib** fields in the grid become editable.
- b. Enter the **Employer Contrib%** or **Employer Contrib** amounts and then click **Save**.

Plan Type: Health

Contribution Method: Percentage

Tier	Premium	Enrolled Count	Employer Contrib %	Employer Contrib	Employee Contrib	Total Cost Employer
Employee Only	\$950.00	1	100.00%	\$950.00	\$0.00	\$950.00
Employee + Spouse	\$1,810.58	2	52.47%	\$950.00	\$860.58	\$1,900.00
Employee + Child(ren)	\$1,601.76	3	59.31%	\$950.00	\$651.76	\$2,850.00
Employee + Family	\$3,043.53	4	31.21%	\$950.00	\$2,093.53	\$3,800.00

Cancel Save

Aetna 1500 PPO	0	\$238	\$0	\$0	\$0
<b>TOTALS</b>	<b>10</b>	<b>\$1,188</b>	<b>\$21,551</b>	<b>\$9,500</b>	<b>\$12,051</b>

- If you want to change **Enrolled Count** values, with the Contribution Method details still expanded, update the **Enrolled Count** fields for each coverage level as necessary.

**Note:** If there are associated child companies, you cannot edit the **Enrolled Count** in BPM. The fields will appear dimmed and unavailable. This is because BPM aggregates parent company and child company enrollment counts for you and uses this information to calculate the percentages and other calculations shown.

**ALERT:** If you return to the Plan Comparison tab and select new plans that are not yet listed here, you should then return to the **Group Summary > Summary** tab and review/edit the contribution methods and enrollment counts for these plans, making any necessary changes.

- Repeat these steps to review contribution method and enrollment details for all plans within each **Plan Type**.

## Step 6: Work on the Remaining Groups (if Applicable)

If you have more than one Benefit Group in this batch, repeat the following sections for the remaining groups:

- Step 3: Review the Benefits Summary
- Step 4: Review and Select Offered Plans
- Step 5: Review the Group Summary

## Step 7: Review the Selection Summary and Submit Selections

**ALERT:** Plans for all Benefit Groups in the current batch must be reviewed and your final selections must be made before submitting final selections. Any plans in "New" status that have not been either selected or rejected will automatically be rejected when you submit final selections.

When you are finished making plan selections for all Plan Types in all Groups, you can review a summary of your selections, add your signature to indicate that you have approved the selections and then finalize the process by submitting the changes.

### To review the selection summary and submit selections:

- When you are finished making plan selections for all Plan Types in all Groups, with any Group and Plan Type shown (as it does not matter), go to the **Summary** tab and click **Continue**.

The screenshot shows the ClientSpace interface with the following data:

Plan Type		Available Plans				
Plan	Enrolled	EO Premium	Total Premium	Employer Contrib	Employee Contrib	
▶ Aetna 1000 PPO	10	\$950	\$21,551	\$9,500	\$12,051	
▶ Aetna 1500 PPO	22	\$238	\$9,163	\$5,225	\$3,938	
<b>TOTALS</b>	<b>32</b>	<b>\$1,188</b>	<b>\$30,713</b>	<b>\$14,725</b>	<b>\$15,988</b>	

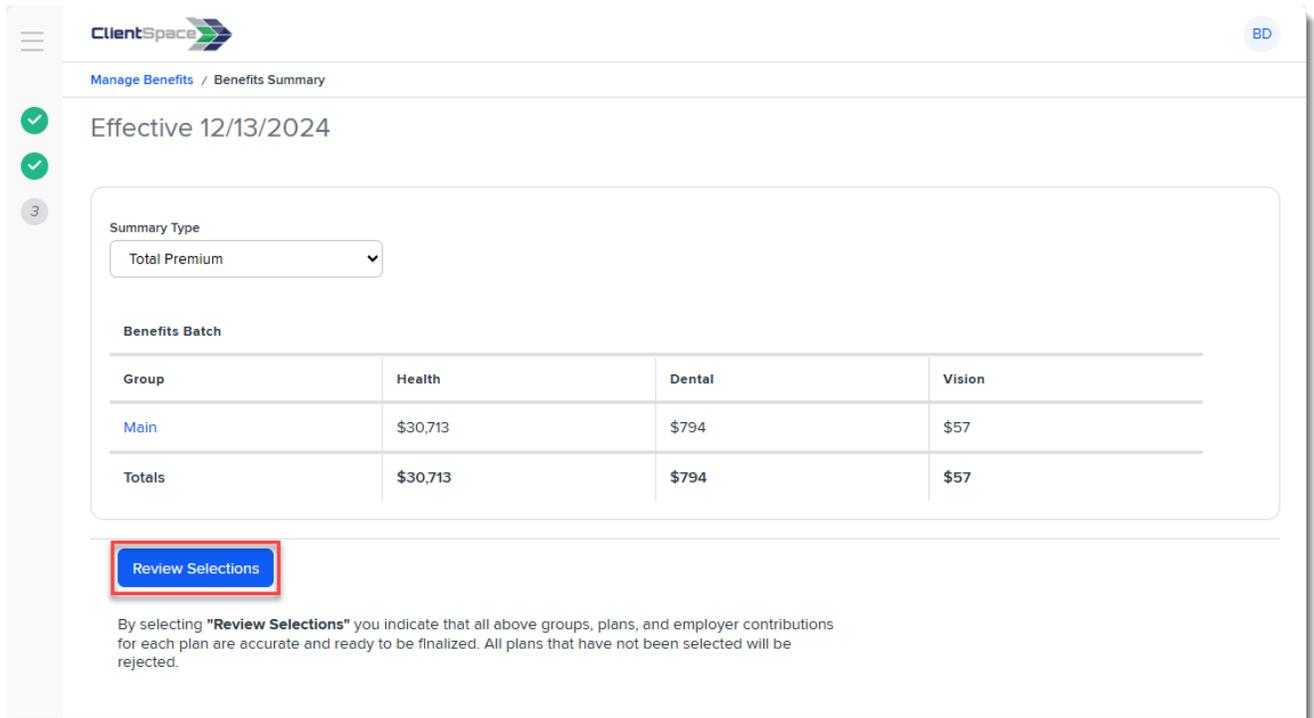
A red box highlights the 'Continue' button at the bottom left, with a red arrow pointing to it.

A confirmation message similar to the following displays.

**peouat.clientspace.net says**  
Are you sure you want to continue?

OK Cancel

2. Click **OK** to continue.
3. Click **Review Selections**.



ClientSpace

Manage Benefits / Benefits Summary

Effective 12/13/2024

Summary Type

Total Premium

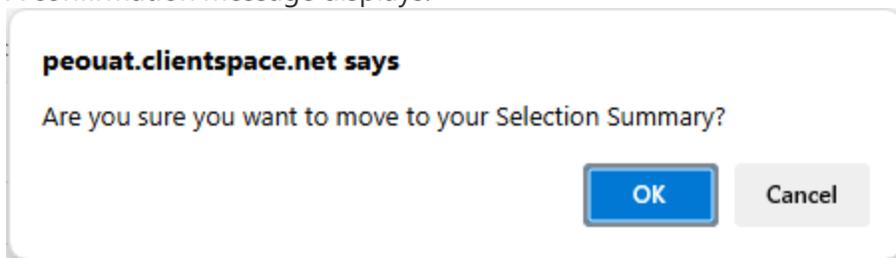
Benefits Batch

Group	Health	Dental	Vision
Main	\$30,713	\$794	\$57
Totals	\$30,713	\$794	\$57

Review Selections

By selecting "Review Selections" you indicate that all above groups, plans, and employer contributions for each plan are accurate and ready to be finalized. All plans that have not been selected will be rejected.

A confirmation message displays.



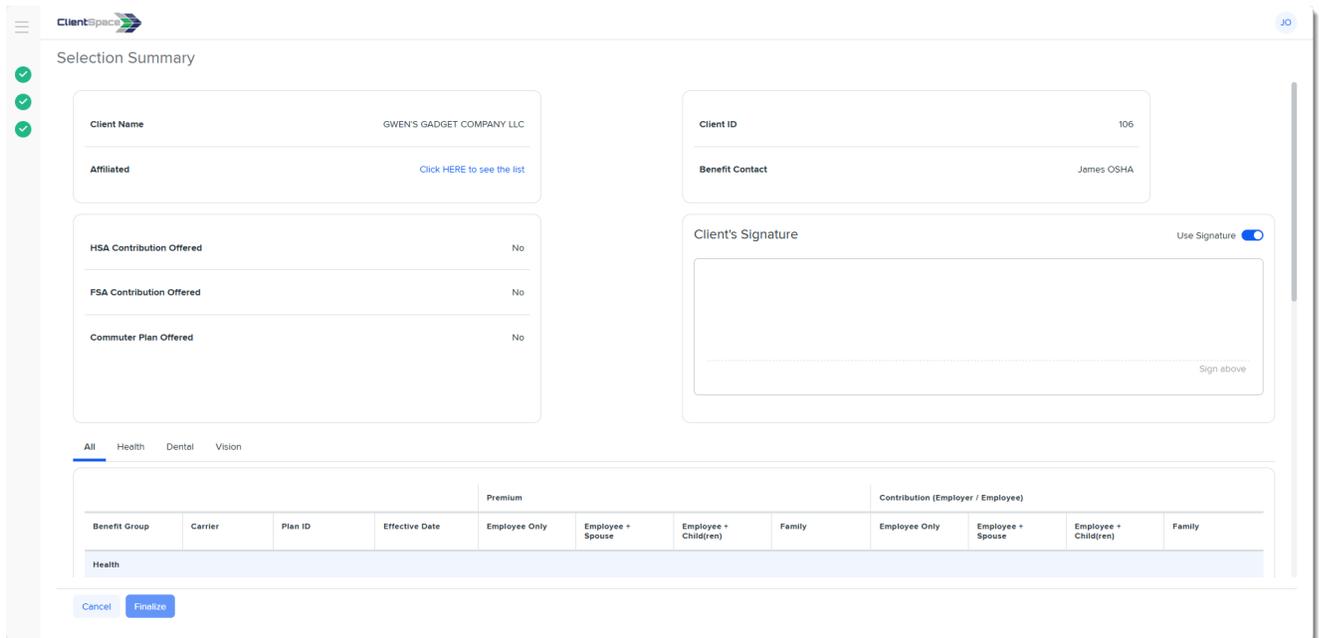
peouat.clientspace.net says

Are you sure you want to move to your Selection Summary?

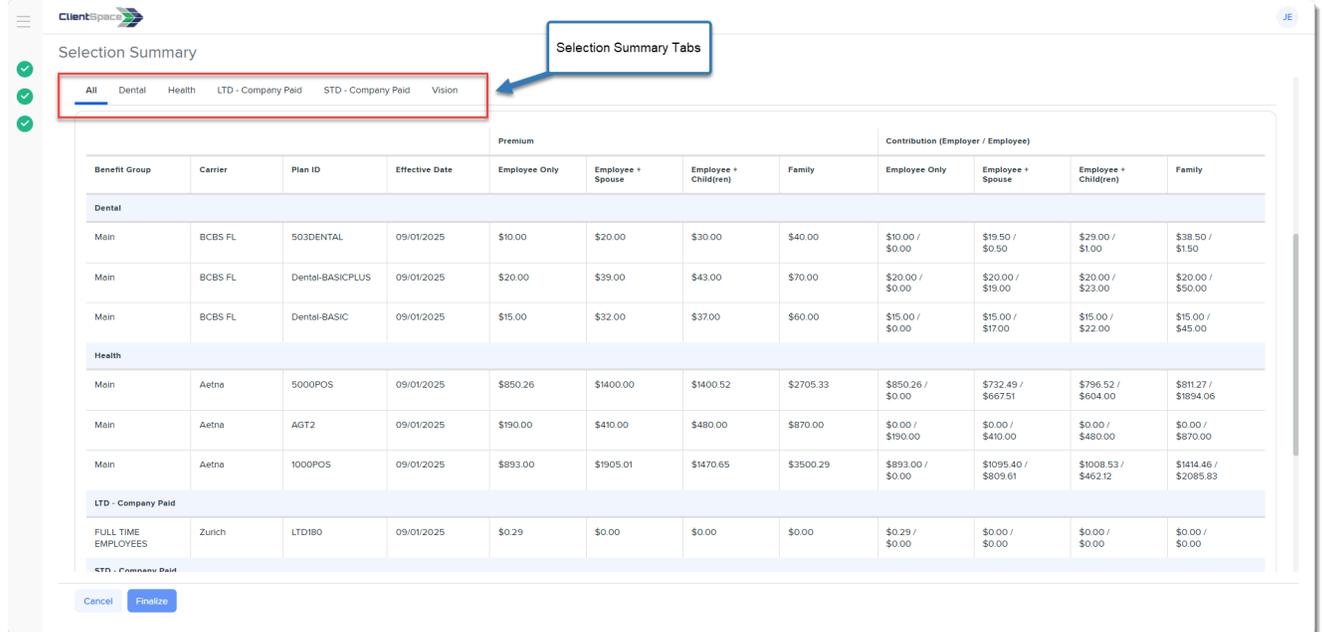
OK Cancel

4. Click **OK**.

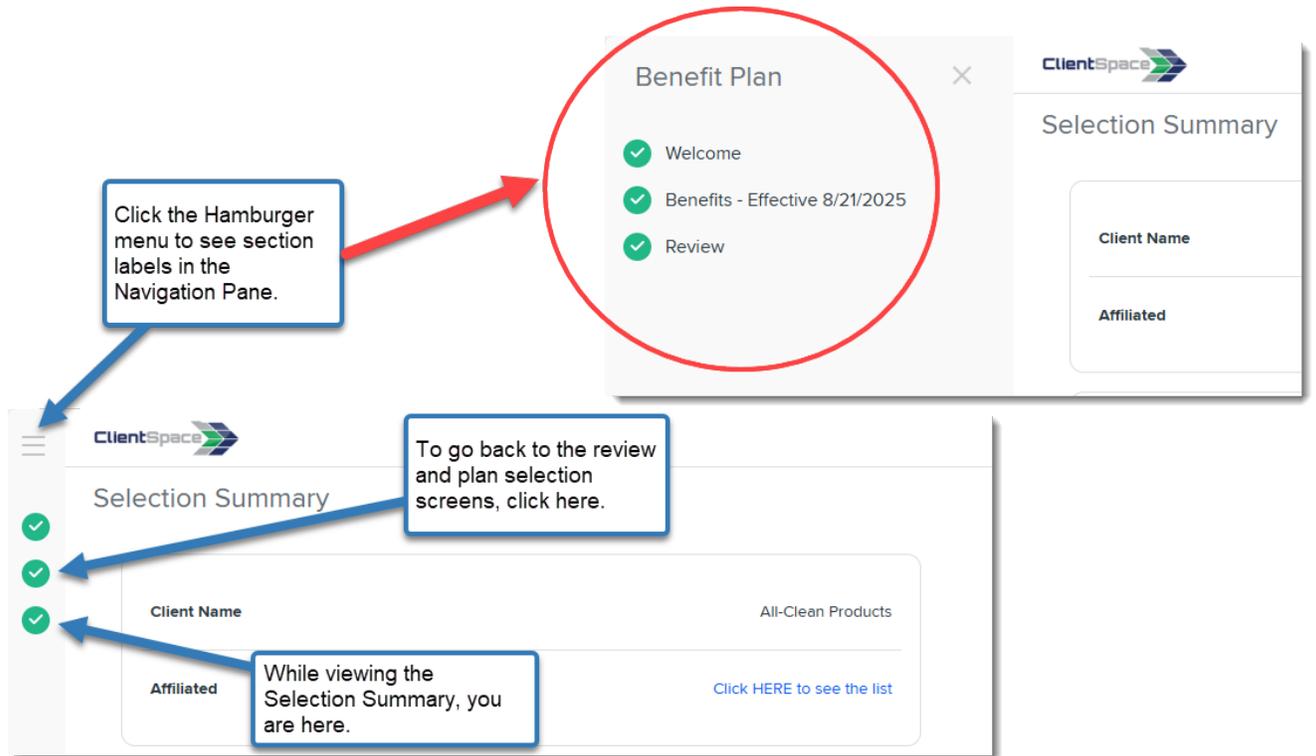
The Selection Summary window displays.



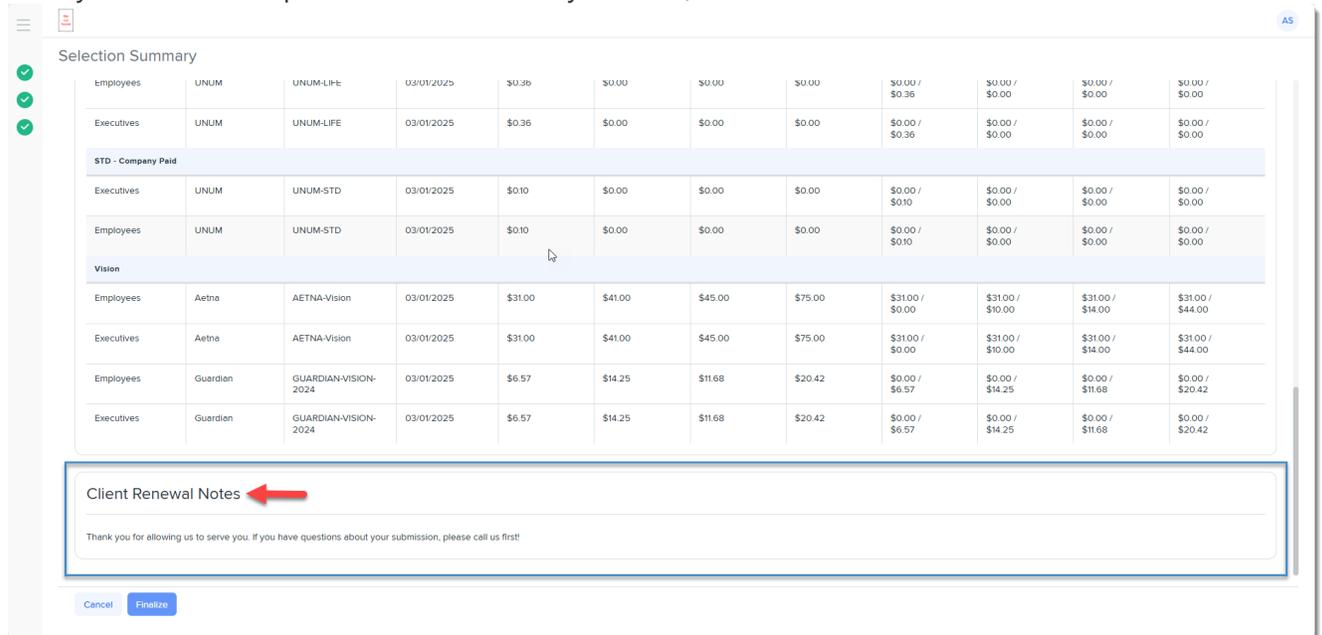
5. On the Selection Summary window, before you finalize your selections, you can:
  - Scroll to the tabbed sections near the bottom of the screen and review selections for each Benefit Group:



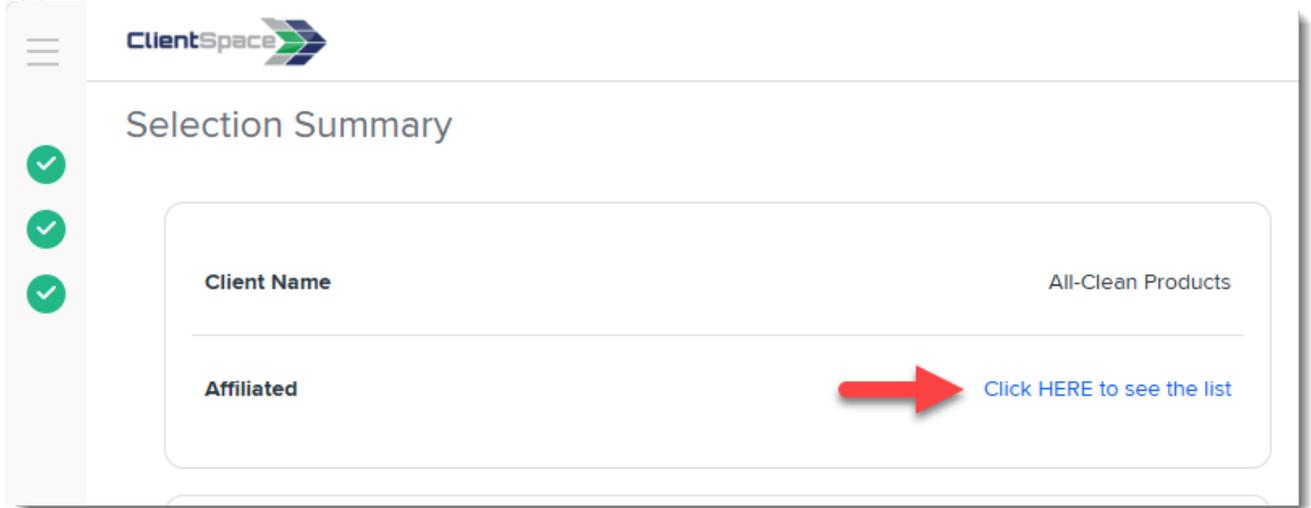
**Note:** If you need to make a correction, go back to a prior section using the left navigation panel. Click the second green check mark to go back to the plan review and plan selection screens.



- View Client Renewal notes, if present. (There could be special instructions or a general note from your Benefits Representative listed for you here.)

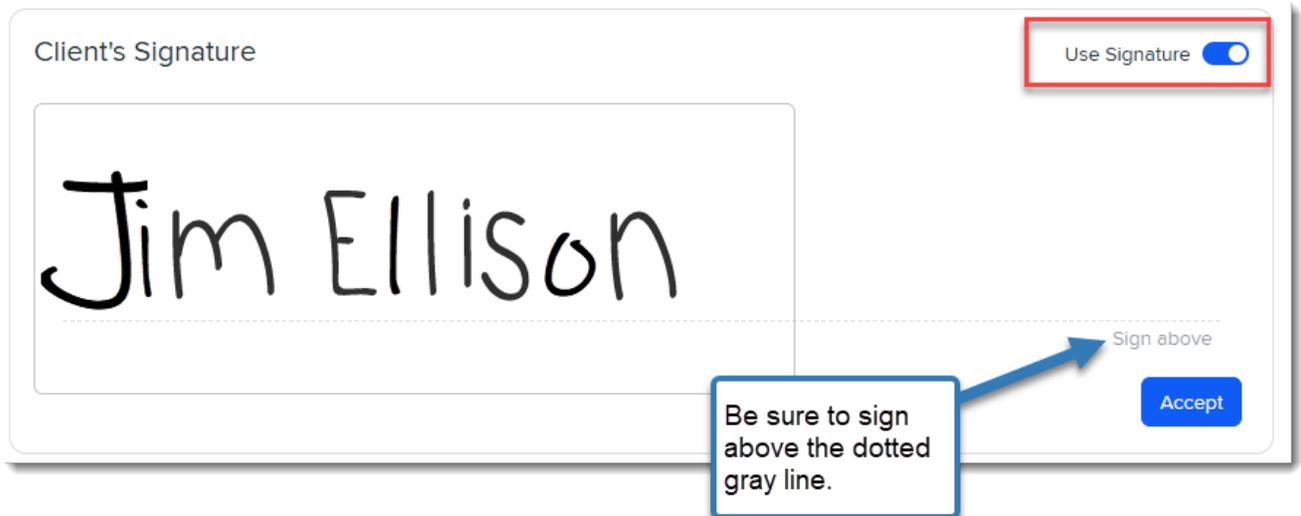


- Click the link in the **Affiliated** section to view the list of related child companies, if applicable.



(This is the same list that can be accessed from the Welcome page. This is mentioned in [Step 2: Open the Batch](#).)

6. When you are certain of your selections, sign the Selection Summary.
  - **If you can sign your signature:** If you have a signature pad, touch pad or wish to use your mouse to sign your signature, click **Use Signature**, sign your name electronically above the dotted gray line, and click **Accept**.



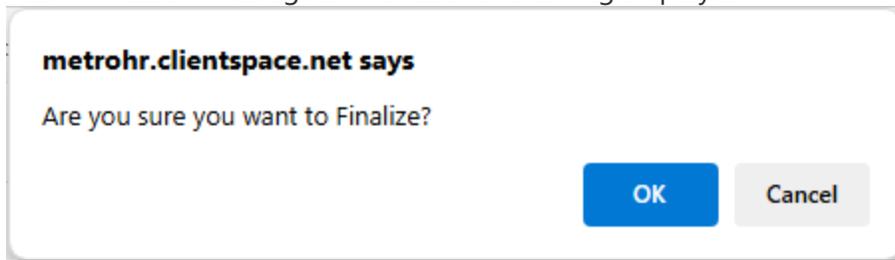
- **If you cannot sign your signature, type it instead:** Ensure that **Use Signature** is not

selected, type your signature in the space provided, and click **Accept**.



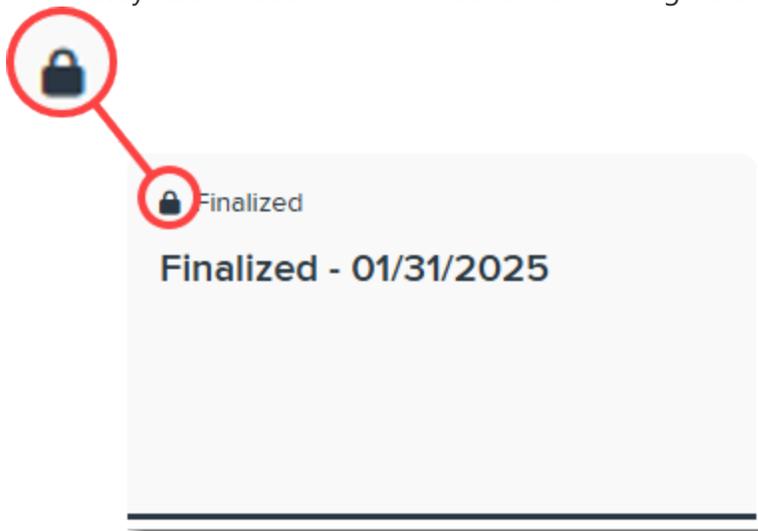
A dialog box titled "Client's Signature" with a "Use Signature" toggle switch in the top right corner. Below the title is a text input field labeled "Type Signature" containing the text "Jim Ellison". A blue "Accept" button is located in the bottom right corner.

7. Click **Finalize** at the bottom of the Selection Summary.  
A confirmation message similar to the following displays:



A confirmation dialog box with the text "metrohr.clientspace.net says" in bold, followed by "Are you sure you want to Finalize?". At the bottom right are two buttons: a blue "OK" button and a grey "Cancel" button.

8. Click **OK** to continue.  
You are returned to the BPM Welcome page where the Benefits Batch card displays "Finalized".  
The lock symbol indicates that this batch can no longer be opened.



Please contact your Benefits Representative immediately if you have submitted in error and need to make changes.