

360° Group User Training Manual



Table of Contents

Section 1: Log- in	1
Section 2: Navigate Group Administration	2
Section 3: Create a Group.....	3
Section 4: Enrolling Travelers.....	4
Section 5: Uploading a Roster.....	5
Section 6: Complete Purchase.....	6
Section 7: Plan Fulfillment.....	7

Contact Information

360° Group Support Team

For plan questions or to make changes to an existing group policy:

Call: 888.574.7026

Email: 360group@travelexinsurance.com

Sales Team

For product questions or training needs contact your [Regional Sales Manager](#)

360° Group Online Enrollment | Step by Step

Section One: Log-in



Getting there

- On the www.travelexinsurance.com site, click on **Partner Login** in the upper right corner (1.1)



Logging in for the first time

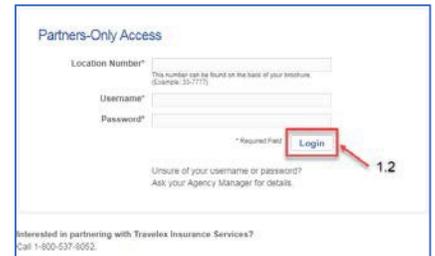
- After selecting **Partner Login** in the upper right corner, a new window will open, you will be asked to enter the following information in the fields provided:

Location Number*

Username*

Password*

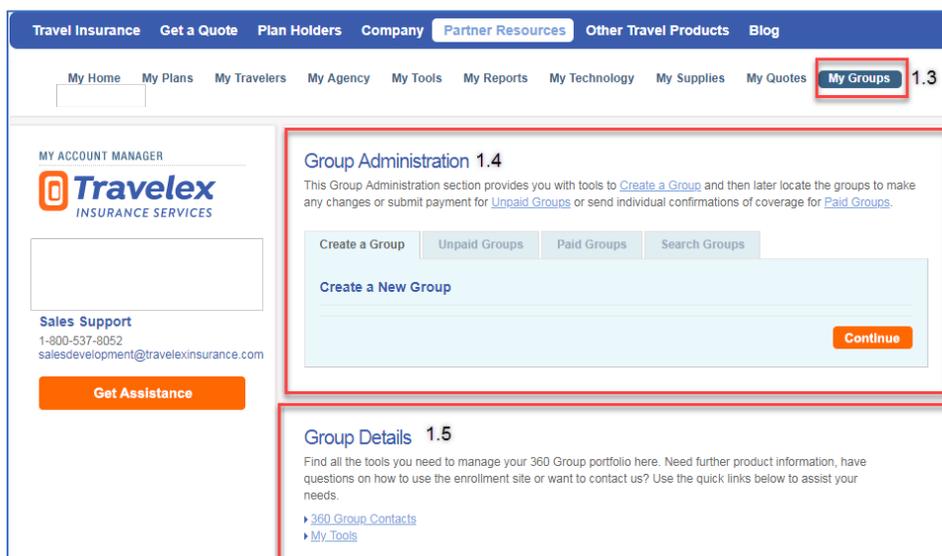
- Click **Login** (1.2).
- After logging in for the first time, each user will be prompted to change their password, which must be a minimum of 8 characters.



If you do not have your Partner Login information, please contact our Sales Development Team at 1-800-537-8052, the Account Management team, or your Regional Sales Manager.

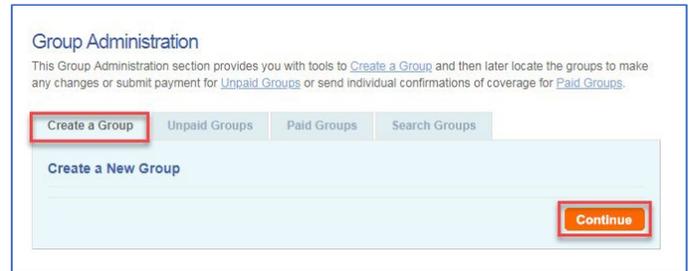
Getting Started

- On the **Partner Resources** home page, select the **My Groups** button (1.3).
- The **Group Administration** sections allow you to create and view groups (1.4).
- The **Group Details** sections provided links to helpful resources. (1.5).



Creating a Group

- From the My Groups tab, in the **Group Administration** area, select the **Create a Group** tab and click **Continue**.



Viewing Unpaid Groups

- Once a group is created, you can access the group any time via Partner Resources. Select the **Unpaid Groups** tab to view a list of all unpaid groups applicable to your agency. Click the **Edit** button next to the applicable group to view, edit or apply payment to a specific group.
 - Note: Oldest groups will be listed at the top of the section, while new groups will be last. Click on any of the headers to sort the groups based on the applicable header name (date or name sorted).



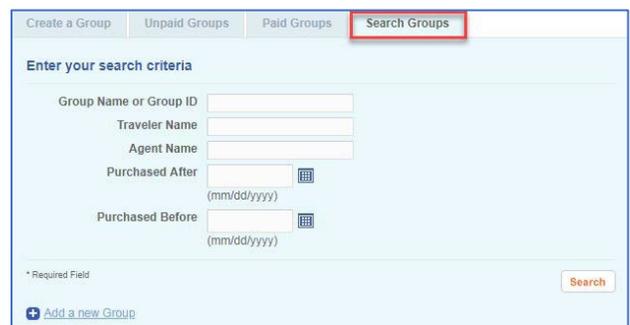
Paid Groups

- After payment has been applied to a group, the group can be located underneath the **Paid Groups** tab. Click **View** next to applicable group to view information about the group or payment applied, print or send Policy Documents.



Search Groups

- To easily search for a group, select the **Search Groups** tab. This allows you to search a group in our system based on specific criteria.
- Complete at least one of the search fields and click **Search**.
 - The system will provide all groups that match the entered information.

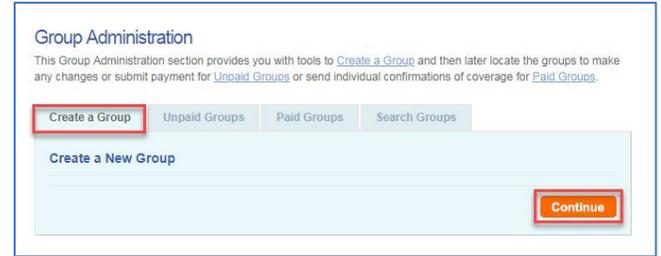


360° Group Online Enrollment | Step by Step

Section Three: Create a Group

Creating a Group

- From My Groups tab, in the **Group Administration** area, select the **Create a Group** tab and click **Continue**.

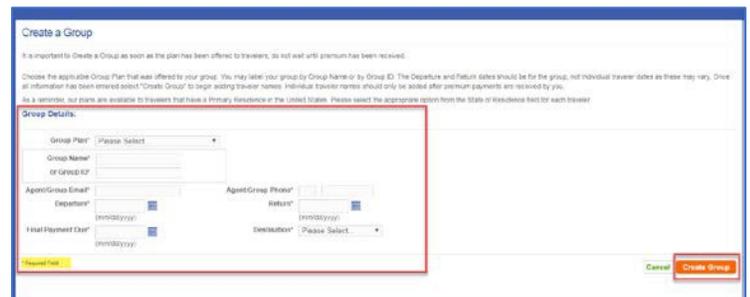


Important information about creating groups

- Create a group as soon as marketing materials, including an offer for travel insurance, have been provided to prospective travelers for a trip.
- The Departure and Return dates entered when a group is created should be for the group, not individual travel dates. Individual travel dates can be adjusted once the **Create a Group** page has been completed.
- The creation of a group policy will not be allowed online if not done more than 15 days prior to departure date.
 - Any modifications occurring after the initial payment of the group enrollment must be requested in email to 360Group@travelexinsurance.com.
- The creation of a group does not guarantee the rate. If there is a product or rate change, you will be notified in separate communication and be provided ample time to complete any unpaid groups.
- Plans are available to travelers who have a Primary Residence in the U.S. or Canada.

Create a Group

- Choose which **Group Plan** to enroll in (i.e. Group Choice, Group Premier, etc.)
- Enter either a **Group Name** or a **Group ID** for the group.
- The **Agent/Group Email** field will self-populate from the Partner Resources log in.
- Provide the **Agent/Group Phone** number.
- Enter the **Group Departure** and **Return** dates.
- Provide **Final Payment Date** for the trip.
- Choose the group's main country **Destination**.
- Select **Create Group** to add travelers.



Group Confirmation

- Once the **Create Group** button is selected, a **Confirmation Number** will be assigned.
- If travelers' have paid for insurance, follow the instructions in the next section to add travelers to the roster.
- If travelers' have not paid for insurance at this point, select the **Close & Resume Later** button. You can access your group again by following the View Unpaid Groups instructions in Section Two.



Note: **Individual traveler names should only be added after premium has been received.** Be certain to keep accurate record of first deposit and premium paid dates.

360° Group Online Enrollment | Step by Step

Section Four: Enrolling Travelers

Travelers may be enrolled under a group policy either by adding them one at a time or by uploading a roster.

Entering Traveler Information

- To add travelers online, choose the number of travelers to enroll by clicking on the down arrow.
 - The webpage will automatically display one row per traveler based on the number of travelers selected to add.

- Enter the requested information (* denotes required fields).

- The **departure and return dates** will auto-populate per the group dates entered when the group was created.
 - To edit individual travel dates, click inside the date field. You can also click on the calendar image to adjust the date. Note: The individual travel dates must be contained within the range of travel dates entered for the group.
- For adult and student plans, **Age** is not required, however you can provide the information if you wish to.
 - For Student plans, you must select (S) for student or (A) for adult travelers. The system will calculate rates based on the 4:1 student to adult ratio allowance. For every four students, one adult will be charged the student rate. Any additional adults will be charged the corresponding plans adult rate.
 - Students must be under the age of 25 at the time of plan purchase.
- Full address** is required for travelers who purchased insurance on or after January 1, 2019. This includes **Address Line 1, City, State and Zip**. **Address 2** is optional.
 - Note: If the traveler resides in Canada, please select the applicable province in the State dropdown along with providing full address. Province options are located at the bottom of the list.
- Deposit Date** is the date the traveler put their initial money down for the trip.
- Premium Paid Date** is the date the traveler paid for insurance directly to the agency, not to Travelex.
- Based on each individual traveler's trip cost and travel dates, the **Premium Due to Travelex** and **Traveler Premium** fields calculate automatically. The **Traveler Premium** field displays the gross amount paid by the traveler. The traveler's invoice should always reflect this amount. No mark-up or admin fee tied to the optional travel insurance purchase may be collected or invoiced.
 - Note: These amounts may adjust when payment is applied based on agency licenses.
- Select the **Save** button at the bottom on the page to save the traveler information entered.

Departure Date*	Return Date*
1/1/2019	1/15/2019
1/1/2019	1/15/2019
1/1/2019	1/15/2019
1/1/2019	1/15/2019

Editing Travelers

- To edit the entire group, select the **Edit** button in the lower right-hand corner of the page.
- To adjust an individual traveler, select the **Edit** icon next to the specific traveler.
- To remove a traveler, select the **Delete** icon next to the specific traveler.
- To resume the enrollment at a later time, select **Close and Resume Later**.

360° Group Online Enrollment | Step by Step

Section Five: Uploading a Roster

Follow the process below to enroll travelers via Excel Roster. Note: You will need to Create the Group online, outlined on Section 3, before uploading an excel roster.

Completing the Roster

- Upon request, Travelex will provide a customized excel roster that can be utilized to record traveler information applicable to the group.
 - Note: There is 1 customized excel roster for each group plan. These are the only rosters than can be uploaded to an Unpaid Group via Partner Resources. You will not be able to record traveler information on a generic excel file as it will not upload correctly.
- The fields in these customized excel rosters follow the traveler information needed online.

Uploading a Roster

- On the **Edit Existing Group** page online, select **Upload Roster**.
- A secondary box will appear, select **Choose File** and locate the roster file to upload from your computer.
- To process the roster, select **Upload Roster**.



Editing Travelers

- Once the excel roster has been uploaded, the traveler information will appear in the applicable fields on the **Edit Existing Group** page. All fields will be open to edit if necessary.
- Review the populated information and make any necessary edits. After editing is complete, click **Save** at the bottom of the page.
 - Upon Save, the information will be validated against the rules of the product and any applicable error messages will display.

First Name*	Last Name*	Age	Trip Cost*	Address Line 1*	Address Line 2	City*	State*	Zip*	Email	Departure Date*	Return Date*	Deposit Date*	Premium Paid Date*	Premium Due to Traveler	Traveler Premium
test	test		1000	123 West Street		Omaha	Nebraska *	68164		3/1/2019	3/12/2019	12/1/2018	12/1/2018		\$75.00
test	test		1000	123 West Street		Omaha	Nebraska *	68164		3/1/2019	3/12/2019	12/1/2018	12/1/2018		\$75.00
test	test		2000	987 Bank Street		Omaha	Nebraska *	68164		3/1/2019	3/12/2019	12/1/2018	12/1/2018		\$137.00
test	test		2000	987 Bank Street		Omaha	Nebraska *	68164		3/1/2019	3/12/2019	12/1/2018	12/1/2018		\$137.00
test	test		500	564 East Street		Omaha	Nebraska *	68164		3/1/2019	3/12/2019	12/1/2018	12/1/2018		\$60.00

360° Group Online Enrollment | Step by Step

Section Six: Complete Purchase



Complete Purchase

- Once all travelers have been added to the group and you're ready to apply payment, select **Complete Purchase**.
 - Note: The **Complete Purchase** button will only appear once the minimum number of travelers, 10, have been added to the group.

Group Details:

Group Plan: 360 Group Choice	Group Status: Awaiting Payment
Group Number: AC3600343	Travelers in Group: 10
Total: \$3,049.00	Group ID:
Group Name: Test	Agent Group Phone: (402)491-3200
Agent Group Email: Test@travelexinsurance.com	Group Return: 01/15/2019
Group Departure: 01/01/2019	Destination: Aruba
Final Payment Due: 10/15/2018	

[Close & Review Later](#) [Complete Purchase](#)

- The payment screen will provide two total costs:
 - The **Total** calculates the total gross amount collected from all travelers within the group.
 - The **Total Payment Due** calculates the total amount owed to Travelex. Licensing is validated when **Complete Purchase** is selected in order for proper compensation to be paid.

Edit Existing Group

You may choose to submit payment by check or credit card. Payment for the group must be received by Travelex Insurance Services no later than 10 days prior to the scheduled Group departure date. Once payment is received you will not be able to add travelers or change traveler information online. You will need to contact our Customer Solutions Department at 888.574.7026 or email 360group@travelexinsurance.com. Once you select "Submit Payment" all premium is non-refundable.

Group Details:

Group Plan: 360 Group Choice	Group Status: Awaiting Payment
Group Number: AC3600343	Travelers in Group: 11
Total: \$3,049.00	Group ID:
Group Name: Test Group	Agent Group Phone: (402)491-3200
Agent Group Email: Test@travelexinsurance.com	Group Return: 01/15/2019
Group Departure: 01/01/2019	Destination: Aruba
Final Payment Due: 10/15/2018	

Add a Payment:

Total: \$3,049.00 Total Payment Due: \$3,049.00

Payment Type: Visa

Card Number: to delete or update

Expiration Date: MM/YYYY
Example: 01/01/12-12/31/13

Card holder name: (It appears on the credit card)

*Required Field

[Back](#) [Submit Payment](#)

Reminder: Payment for the protection plan must be received by Travelex at least 10 days prior to the group departure date.

Payment by Credit Card

- Enter in the credit card information.
- Select **Submit Payment**.
- Once payment is submitted, confirmation that the payment has been accepted and a link to download the Confirmation and Policy documents will appear.

Add a Payment:

Total: \$3,049.00 Total Payment Due: \$3,049.00

Payment Type: Visa

Card Number: to delete or update

Expiration Date: MM/YYYY
Example: 01/01/12-12/31/13

Card holder name: (It appears on the credit card)

*Required Field

[Back](#) [Submit Payment](#)

Payment by Check or ACH

- Select Check or ACH payment and then click **Submit Payment**.
 - Note: ACH will only display if the account has approved this type of payment method.
- Upon clicking Submit Payment, the **Payment Details** page will display along with option to view a **Mail in Payment Form**. Print this form and include with the check payment being sent to Travelex.

Payment Details:

Payment Type	Payment	Payment Amount	Payment Status	Documents
Check	05/27/2015	\$3,049.00	Payment Pending	Mail in Payment Form

Payment has been successfully added.

[Close](#)

- Note: If paying by check, the group will remain in a Payment Pending status until payment is received and applied by Travelex. If paying by ACH, the group will remain in a Payment Pending status until ACH has been authorized.

Important

Once payment has been applied to the group, any traveler and/or policy changes must be requested via email to 360group@travelexinsurance.com or by calling the 360° Group Support Team at 1-888-574-7026.

Accessing Confirmation and Policy Documents

- Once payment has been received and applied to the group, the Group Status becomes Active (7.1).
- At this point, the group can be view under the **Paid Groups** tab within the **Group Administration** section. See Section Two for more details on how to access this.
- Within the **Paid Group** page, you will be able to view, print, and email both the Confirmation of Coverage (COC) and Policy document. Additionally, you can view payment information and download an Invoice for accounting purposes, if needed.
- To print a full Group COC, select **Print Group Confirmation** (7.2).
 - This will provide one master confirmation document for all travelers in the group.
- To print all Individual COC, select **Print All Individual Confirmations** (7.3).
 - This will provide a separate confirmation document for each traveler within 1 PDF file.
- To View/Download the policy based on a specific traveler's state of residence, select **Print Description of Coverage** (7.4).
 - This will open a separate webpage directing you to the Policy Document Site.
- To print an individual's COC, select the **printer icon** next to the traveler's name (7.5).
- To email an individual's COC and Policy, select the **envelope icon** next to the traveler's name (7.6).
- To view payments applied or the invoice, select either **View Payments** or **View Invoice** (7.7).
 - Note: You will be able to access the Invoice when you click on the View Payments button.

Paid Group

Using the colored buttons below Group Policy Details, you may choose to Print Group Confirmation which will list all travelers associated with the group or choose Print All Individual Confirmations to download a file with a separate confirmation page for each traveler. Additionally, you may choose the printer and envelope icons next to each individual traveler's name to print or email an individual Confirmation of Coverage to the applicable traveler.

Group Details:

Group Plan: 360 Group Choice	Group Status: Active 7.1
Group Number: AG0501121	Travelers in Group: 10
Total: \$724.00	Group ID:
Group Name: Group Test	Agent/Group Phone: (402)491-3200
Agent/Group Email: test@travelexinsurance.com	Group Return: 03/12/2019
Group Departure: 03/01/2019	Destination: Aruba
Final Payment Due: 02/01/2019	

7.7 7.2 7.3 7.4

[Close](#) [View Payments](#) [View Invoice](#) [Print Group Confirmation](#) [Print All Individual Confirmations](#) [Print Description of Coverage](#)

Traveler Details:

7.5 **7.6**

	First Name*	Last Name*	Age	Trip Cost*	Address Line 1*	Address Line 2	City*	State*	Zip*	Email	Departure Date*	Return Date*	Deposit Date*	Premium Paid Date*	Premium Due to Travelex	Traveler Premium
	test	test		\$500	564 East Street		Omaha	Nebraska	68164		03/01/2019	03/12/2019	12/13/2018	12/13/2018	\$50.00	\$50.00
	test	test		\$2,000	967 Bank Street		Omaha	Nebraska	68164		03/01/2019	03/12/2019	12/01/2018	12/01/2018	\$137.00	\$137.00
	test	test		\$2,000	967 Bank Street		Omaha	Nebraska	68164		03/01/2019	03/12/2019	12/01/2018	12/01/2018	\$137.00	\$137.00