

360° Group User Training Manual





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Contact Information

360° Group Support Team

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

Call: 888.574.7026

Email: <u>360group@travelexinsurance.com</u>

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 <u>www.travelexinsurance.com</u> 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 1-800-537-8	052, 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).

Travel Insurance Get a Quote Plar	Holders Company Partner Resources Other Travel Products Blog
My Home My Plans My Travelers	My Agency My Tools My Reports My Technology My Supplies My Quotes My Groups 1.3
MY ACCOUNT MANAGER	Group Administration 1.4 This Group Administration section provides you with tools to <u>Create a Group</u> and then later locate the groups to make any changes or submit payment for <u>Unpaid Groups</u> or send individual confirmations of coverage for <u>Paid Groups</u> .
Sales Support 1-800-537-8052 salesdevelopment@travelexinsurance.com	Create a Group Unpaid Groups Paid Groups Search Groups Create a New Group Continue
Get Assistance	Group Details 1.5 Find all the tools you need to manage your 360 Group portfolio here. Need further product information, have questions on how to use the enrollment site or want to contact us? Use the quick links below to assist your needs. > 360 Group Contacts > My Tools

	15.787529.22771111
Username*	
Password*	
	Unsure of your username or passeord? 1.2 Ask your Agency Manager for details.

360° Group Online Enrollment | Step by Step Section Two: Navigate Group Adminstration



Creating a Group

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

reate a Group	Unpaid Groups	Paid Groups	Search Groups	
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eate a New G	roup			

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.

Create a Gr	oup Unpaid G	roups Paid G	roups Searc	h Groups	
	<u>Group Name or</u> <u>Group ID</u>	Enrollment Date	Departure Date	Payment Due Agent	
Edit	test	01/05/2018	12/04/2017	02/09/2018	

 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.

Create a Group	Unpaid G	iroups Paid	d Groups	Search Group	ps	
<u>Group</u> Confii Numb	t mation er	<u>Group Name</u> or Group ID	<u>Status</u>	Enrollment Date	<u>Departure</u> <u>Date</u>	Agent
View ACGB	00042	test	Payment Pending	01/05/2018	12/04/2017	
Accel	00042 D	test	Payment Pending	01/05/2018	12/04/2017	

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.

Group Name or Group ID			
Traveler Name			
Agent Name			
Purchased After			
	(mm/dd/yy	уу)	
Purchased Before			
	(mm/dd/yy	yy)	

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**.

changes or submi	t payment for <u>Oripaid G</u>	roups or send indivi	dual confirmations of covera	ge for <u>Paid Groups</u> .
create a Group	Unpaid Groups	Paid Groups	Search Groups	
reate a New G	roup			

Important information about creating groups

- 1. Create a group as soon as marketing materials, including an offer for travel insurance, have been provided to prospective travelers for a trip.
- 2. 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.
- 3. The creation of a group policy will not be allowed online if not done more than 15 days prior to departure date.
 - a. Any modifications occurring after the initial payment of the group enrollment must be requested in email to <u>360Group@travelexinsurance.com</u>.
- 4. 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.
- 5. 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.

	Cite the Automatic beaution in Additionality
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.

create a Group							
t a important to Create	a Orbup as seen as the plan	n has been offe	w tox ob greened of ber	at urbi premum has t	wen received.		
Choose the approache i al information has been	Oroug Plan that was offered to n entered points "Create Orou	le your group to begin ad	fin, may label your group ding traveler homes. Indi	by Oroop Name or by ridual baveler names	Orang KD The mould only be	eparture and lifeture dates should dod after premium payments are in	be for the group, not individual traveler dates as these may vary, I proved by you.
As a reminder, out plan	s are invaliable to travevers to	at have a Prin	ary Hesidence in the Unit	wistme Pease sal	norrook off the	e option from the State of Residence	on theirs for each traveler
Group Details.							
Group Play	Pease Selart						
Group Name*							
OF GROUP R2F							
AgentiGroup Einal*			Agent/Group Phone*				
Cepertary*	(mestatiyyy)		Relars*	(minolastyryy)			
Final Payment Day"	(MH4/823333)		Desimitor'	Piease Salart			
ALC: NO. OF THE OWNER.							

	Confirmation											
	Number											
Group Number, AC0201121	Onus Str	ing Automation Provider										
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Group Name Group Test	Groep	10										
port/Group Email Ins Strawskows.	Januar ApentiQuisa Phi	KM (4020414-0000										
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Concernation of the second sec	ere : H										444 1	• 100000

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.

Traveler Deta	hils:														
First Name*	Last Name*	Age	Trip Cost*	Address Line 1*	Address Line 2	City*	State*	Zo*	Email	Departure Date*	Return Date*	Deposit Date*	Premium Paid Date*	Premium Due to Travelex	Traveler Premium
This Group Poli Click the Add bi	cy currently has no utton below to add ti	bavelers. ravelers.													
														Add 1	• Opined Roster

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

Taveler Detai	15:														1	1
First Name*	Last Name*	Age	Trip Cost*	Address Line 1*	Address Line 2	City*	55W*	20*	Enal	Departure D	ate*	Return Date*	Deposit Date*	Premum Paid Date*	Premium Due to Travelex	Traveler Premum
	1			3		148	Please st *	-	1.0	3/1/2019	100	3/12/2019	1	1		
	[14	Please st *			3/1/2019	-	3/12/2019		1		
	17		1	1		1.0	Please se *	1	110	3/1/2019	100	3/12/2019		前		

- 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.

Departure D	ate*	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

- o 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 <u>January 1, 2019</u>. 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.
- o 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.
 - \circ $\;$ 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.

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.

raveler Detail	5:														Edit 1 Traveler	Dela Tran
First Name*	Last Name*	Age 1	Trip Cost"	Address Line 11	Address Line 2	City.	State*	Zø*	Enal	Decarture Date*	Return Date*	Deposit Date*	Premium Pald Date*	Premium Due to Travelex	Travelor Promium	
eel .	het	1	2800	SM Food Street		Oronite	Netrocks	81164		00010/2018	00413030459	12/15/2010	12/12/2010/01/0	\$50.00	\$50.00	12
est	1057		52,000	987 Bank Street		Omaha	Nebraska	68164		03/01/2019	03/12/2019	12/01/2018	12/01/2018	\$137.00	8137.00	12
est	test.	1	\$2,000	997 Bank Street		Orsaha	Netraska	63164		03/01/2018	03/12/2019	12/01/2018	12/01/2015	\$137.00	\$\$37.00	14
est	365	8	51,000	123 West Street		Onaha	Nebraska	68164		03/01/2019	05/12/2019	12/01/2018	12/01/2018	\$75.00	875.00	1
est	1052	1	51,000	123 West Street		Omaha	Nebraska	68164		03/01/2015	03/12/2019	12/01/2018	12/01/2018	\$75.00	875.00	1/2

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.

heave read all terms & conditions on botto	m of Page before continuing		Plan Number:	ACGB-1217 Prode	et: Adult Group	Choice
raveles Location Number (Required)						
cavel Support/Agency Name (Required):						
rater addbrest s gove a friedmeat						
oup information - Please ensure all require	ed fields are filled out			Income	line of the second seco	
oup Name (Required):	Email of Ploster Com	act (Required):		Departure	Heturn,	
stination (Required):	Cruise and/or Tour O	perator(s):		Total # of insured of	in roster(s):	0
oster Completes By:	Atriae Operator(s):			Date Completes		merreen
360	° TRAVEL PROT	ECTION	FOR GROUP	PS SUMMAR	Y PAGE	
Fransferred Sub Totals from P	assenger Information		1. C			
Pages		Total Pr	orection cost p	er page	Comr	nents
			40.00			
dat Amount day transferred from Page 1			80.00			
cal Amount due transferred from Page 2			10.00			
tal Amount due transferred from Page 4			80.00			
tal Amount due transferred from Page 5			\$0.00			
al Amount due transferred from Page 6			\$0.00			
al Amount due transferred from Page 7			10.00			
tal Amount due transferred from Page 8			\$0.05			
tal Amount due transferred from Page 9			\$0.00			
tal Amount due transferred from Page 10			\$0.00			
Total Amount due to Tra	velex Insurance Services:		\$0.00	2.0		
RMS & CONDITIONS						
yment/Remittance						
ie checks payable to Travelex Insurance Servi	oes.					
nit roster/manifest to: 360group@travelesinsurance	non					
nit check payment to: Travelev Insurance Sev	ices Anno 360 Group Department 914	O'West Dodge Road	Suite 300, Onaha, NE, 66	154		
sters and payment must be received in Omaha	15 days price to departure date.					
te: Additions to previously submitted of	osters will be accepted if receiv	red by Traveles p	prior to departure.			
an Provisions						
test are subject to the sole with a '0' downside						
es are superior to change with a 30 day hotoe.	indust and some solars loan into the	mandinan daar	not mark ananon koannas	Balance the SET Day of Tr	al Protection Proceedings	to more followering
they us contrained on agency re-	there are reached activity of	shread deer does	reaman allegely scenter	renering and 300 Group II	Mar Provenue Procedures	internet and mapping
PORTANT: Adult chaperones may be con-	ered at the Student rate, but are li	mited to 1 adult to	revers 4 students. The	spreadsheet does not to	ack the student to adult	ratio.
ditional adults must be charged the comp	arable program's adult rate hower	er the spreadshee	t will not automatically	calculate this adult rate.		
entive December 2017						

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.

Traveler Detail	is:														
First Name*	Last Name*	Age	Trip Cost*	Address Line 1*	Address Line 2	CIV*	State*	Zø*	Emai	Departure Date*	Return Date*	Deposit Date*	Premium Paid Date*	Premium Due to Traveles	Traveler Premium
test	test		1000	123 West Street		Omaha	Nebraska *	68164		3/1/2019 10	3/12/2019	12/1/2018	12/1/2018		\$75.00
test	test		1000	123 West Street	1	Omaha	Nebraska *	68164	10	3/1/2010	3/12/2019	12/1/2018	12/1/2018		\$75.00
test	test		2000	907 Bank Street] [Oshaha	Nebraska *	68164	110	3/1/2019	3/12/2019	12/1/2018	12/1/2018 0		\$137.02
test	best		2000	987 Bank Street		Oreaha	Nobraska *	68164		5/1/2019	3/12/2019	12/1/2018	12/2/2018		\$137.00
5631	test		500	564 East Street] [Omaha	Nebraska *	68164		3/2/2019	3/12/2019 18	12/13/2018	12/13/2018 🔠		\$50.00
*Replied Field														54	Cancel

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 Plan	360 Group Choice			
Group Number	ACG800948	Group Status	waiting Payment	
Total	\$750.00	Travelers in Group	0	
Group Name	Test	Group ID		
Agent/Group Email	Test@travelexinsurance.com	Agent/Group Phone	402)491-3200	
Group Departure	01/01/2019	Group Return	1/14/2019	
Final Payment Due	11/15/2018	Destination	ruba	

- 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.

	pub		
You may choose to sub not be able to add trave Drice you select "Subm	mit payment by sheck or credit can tens or change traveler information it Payment" all promium is non-refu	 Payment for the group ms online. You will need to con undable. 	ust be received by Travelius Insurance Services no later than 10 days prior to the scheduled Orioup departure date. Once payment is received you wi face our Guatomier Souraons Department at 856 574 7026 or email 360prove@traveliversecter.com
Group Details:			
Group Plan	360 Group Choice		
Group Number	ACG800943	Group Status	Awating Payment
Total	\$3,049.00	Travelers in Group	-11
Group Name	Test Group	Group ID	
Agent/Group Email	Inst@travelexinsurance.com	Agent/Group Phone	(402)401-5200
Group Departure	01/01/2019	Group Return	01(15/2019
Final Payment Due	10/15/2018	Destination	Andre
Add a Payment			
Hour all a fractions		1	
Total	\$3,049.00	Total Payment Due	53.049.00
Payment Type*	Visa		
Card Number*	Card Number to tables anglese		
Expiration Date*	MMATCHAR Example minimum		
Card holder name*	UNLY Appears on the shelf card.		

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.

Total	\$3,049,00	Total Payment Due \$3,548.00	
Payment Type*	Visa		
Card Number*	Card Number		
Expiration Date*	MM/YYYYY banga weboo		
Card bolder name*	As it appears of the sheat card)		
legited Faid			Back Solenit Paymen

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.

xyment Type	Payment	Payment Amount	Payment Status	Documents
Check	09/27/2018	53 049 00	Payment Pending	Meil In Payment Form

• 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 <u>360group@travelexinsurance.com</u> or by calling the 360° Group Support Team at 1-888-574-7026.

360° Group Online Enrollment | Step by Step Section Seven: Plan Fulfillment



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 th Addition	e colored buttons ally, you may cho Details:	below Group Polic ose the printer and	/ Details, you envelope ico	u may choose to ns next to each i	Print Group Confirmation individual traveler's name	in which will list all travele ie to print or email an ind	ris associated with vidual Confirmation	the group or choose of Coverage to the	e Print All Indi applicable tri	vidual Confirmations system	to download a file with a separate co	nfirmation page for eac	h traveler.			
G Agent Gro Final	Group Plan 3 iroup Number A Total 5 Group Name G DGroup Email 16 oup Departure 0 Payment Due 0	60 Group Choice CG801121 724-00 iroup Test est@travelecimumat si01/2019 201/2019	ice.com	Gro Traveler Agent/Gro Gro D	up Status Active in Group 10 Group I0 up Phone (402)491-3 up Return 03/12/2019 estination Arubu	200					77	72	73		7.	4
										Close View P	ayments View Invoice Print	Group Confirmation	Print All Individual C	Confirmations Pr	int Description	of Coverag
Travelo	er Details:															
7.5 7	.6														Premium	Transfer
11	First Name*	Last Name*	Age	Trip Cost*	Addresse Line 1*	Address Line 2	City*	State*	Zip*	Emai	Departure Date*	Return Date*	Deposit Date*	Date*	Due to Travelex	Premium
	a 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
	3 test	best		\$2,000	967 Bank Street		Ómaha	Nebraska	68164		03/01/2019	03/12/2019	12/01/2018	12/01/2018	\$137.00	\$137.00
44 103	2 test	tast		\$2,000	007 Dank Otreat		Omena	historialis	60161		010/00/0	anua anio	10010010	10010048		6127.02