RELIANCE STANDARD
A MEMBER OF THE TOKIO MARINE GROUP

Online List Bill

Quick Tips

Dashboard

After you login, the dashboard allows you to easily access the ***Member Management, Billing & Payments and Reports*** screens. To navigate back to the dashboard from anywhere, click on the Reliance Standard logo in the top left corner of the screen.

Add and Manage Sub Users

To update your own password, grant, or manage Sub Users, click on your name in the upper right corner on the dashboard and follow the prompts.

Pro Tip: The Benefit Administrator is the only person who has permission to add or manage Sub User access.

Member Management

On the ***Member List***, you can view member demographic information, coverages, and dependent details by clicking the chevron ⌵ on the right to expand the view for each member. Once expanded, you are able to click Update to make changes on each Tab: Member, Coverages and Dependents.

Member **Coverages** **Dependents**

Easily add a new member, terminate a member, and update coverages - i*ncluding Qualifying Life Event updates and changes to Voluntary/Contributory coverage after approved Enrollment periods* - by clicking the checkbox next to the person's name and then selecting, "I want to" from the drop down menu.

Pro Tips:

- Answering Yes or No to, "Is this a Qualifying Life Event (QLE)?" and completing the "Election Date" field are required for every transaction.
- When selecting "Add a New Member" and entering the required personal and employment information, providing the employee's email address is recommended for Evidence of Insurability (EOI) processing, if applicable.

Updating Coverages

When updating Coverages there are two tabs that you can view and navigate to and from: **Enrolled and Eligible**. Click the checkbox next to the coverage(s) to be updated and review the entire section to complete all required fields. Once the updates have been completed, click Next. The progress bar at the top can be used to confirm your progress. Once on the Confirmation Summary page, review the information for accuracy and click "Save and Submit" to save all changes.

Pro Tips:

- Salary Changes: When processing salary changes, do not enter the new salary until your invoices are paid to the date equal to the Effective Date of change of the salary change. Once the invoices are paid to or after the effective date of the salary change, enter the Effective Date in the Election Date field and complete the salary updates.

- EOI: For Contributory/Voluntary late applicant elections or coverage elections over the Guaranteed Issue (GI) requiring EOI, a message will display in addition to an orange "EOI" icon next to the coverage to indicate EOI is required. The elected coverage amount over the GI or the full amount for late entrants will display as PENDING until the EOI is processed.

- EOI status can be viewed by clicking on the Reports link on the top toolbar and then selecting EOI Summary as well as on the next monthly invoice on the tab "Recent EOI". The status can also be viewed at: **customercare.rsli.com/CustomerCare.aspx** , Service Tools > Medical Underwriting

Billing and Payments

The Billing and Payments page allows you to perform all major functions from a single location.

- Invoices are in a "tab" formation by clicking on the month.
- Click the chevron ⌵ on the lower right to Expand All" for the billing details.
- Click "View/Adjust List Bill" hyperlink to the left to view the bill in its entirety.

You can:

- **Adjust and Recalculate/Finalize Bills**
  Click on ***Manage Payments*** or ***Payment Methods*** on the Dashboard or anywhere in the Billing & Payments hyperlink to add/update/view an Online Payment Profile or click on Schedule/Past Payments to view upcoming or past payments.

- **View and Adjust Invoice(s)**
  Click on the chevron ⌵ to the right of the member to make member updates directly from an invoice that has not been recalculated/finalized.

- **Recalculate and Finalize Invoice**
  An invoice can only be *recalculated and finalized one time.* Please be sure all member changes are captured before clicking recalculate and finalize. If more than one invoice is open/due, any further adjustments made after recalculating/ finalizing the oldest invoice will appear on the *subsequent invoice(s) once each invoice is recalculated and finalized.*

- **Print Invoice and Remittance Coupons**
  Click on the PDF images to print Invoices and Remittance Coupons. If paying by check, be sure to print and include your Remittance Coupon to expedite processing.

- **View Billing History**
  Click on Billing History and select the date range that you wish to display. Invoices can be printed and retained in PDF format.

Make an Online Payment

From the Dashboard, click on ***Manage Payments*** or ***Payment Methods*** or, within the Billing & Payments hyperlink, click on Make a Payment. To add, update and/or set up automatic/recurring payments, click on Payment Profile.

Pro Tip: Invoices must be recalculated and finalized prior to clicking "Make a Payment".

Reports

To access Claims, EOI, and Premium History reports, click on Reports at the top of the Dashboard. Click on the Report Selection drop down menu to select a report and follow the required prompts. Reports can be printed and retained in PDF format.

Download Benefit Forms

To access Claims, Conversion, Portability, Beneficiary forms and more, go to: **customercare.rsli.com/Forms**. You do not need to be logged in to download forms. Contact your Account Manager for your personalized Enrollment and Statement of Health (EOI) form.

Questions?

You may reach out to your Account Manager or
you can call the Contact Customer Care Center from 7:00 AM – 7:00 PM ET
at 1-800-351-7500, select prompts 1- 5- 3 and a representative will assist you.

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