

AUTHORIZED CONTACTS / PLAN ADMINISTRATOR / EMPLOYER PORTAL USERS - CHANGE NOTICE

Complete and submit to OASSIS to add / remove or change authorized plan contacts or to update contact information.

Agency / Employer Name:

Agency / Location # (_ _ ASO _ _ _ _):

Date (YYYY/MM/DD)

The **Plan Administrator** is the primary contact and will receive all communications for plan administration information, monthly invoice notices, access to the Employer Portal and all posted plan and member documents.

Up to three authorized contacts can be set-up with administrative authority in the benefit plan.

Authorized Contacts are approved by the Employer to:

- Access all member & benefit plan information
- Make member & benefit plan changes directly with OASSIS through their dedicated OASSIS Benefits Administrator
- Make member & benefit plan changes in the self-administration Employer Portal when authorized with read & write access

Authorized Contacts are required to:

- Maintain and retain accurate plan member records including a completed OASSIS enrollment form; required in the event of a life claim
- Provide OASSIS with all information required to administer the Plan in compliance with the policy, eligibility rules and insurance carrier requirements; including but not limited to:
 - ✓ Ensuring eligible employees and eligible dependents are enrolled no later than 31 days after the Eligibility Date
 - ✓ Ensuring an eligible Spouse and / or Dependents are enrolled no later than 31 days after a Qualifying Life Event
 - ✓ Report Changes to Member Employment Status - Change of Earnings, Hours of Work, within 31 days of the change
 - ✓ Request Changes to Member Coverages (addition / removal of spouse or dependents, requests for additional coverages)
 - ✓ Reporting Group Plan Member Leaves of Absence - members not actively at work for 7 or more consecutive days - due to medical reasons, Employment Standards protected leaves, layoffs
 - ✓ Reporting Termination of Benefits - for members who are no longer eligible for group benefit plan coverage due to end of employment / changes to employment status,

Employer Portal - Registration and Administration Access

- Authorized contacts with access to the Employer Portal will receive an email invite from CWI / iBenefits to register for the Employer Portal.
- Once successfully registered, authorized contacts will be able to view plan / member information, process a selection of administrative changes, access monthly premium invoices and download the important member documents (as per their individual permissions authorized on this form).
- Please contact your OASSIS Benefits Administrator for assistance accessing the Employer Portal or the posted member documents and invoices. A step by step Administration Manual is posted on the Employer Portal

Please Note: Self-administration of new enrollments and changes by employers is ***not mandatory***.

- Plan changes, new enrollments and all member changes can be submitted to your dedicated OASSIS group Benefits Administrator for processing and document retention.

Employer Self-Administration - Document Retention Requirement

- Employers who elect to self-administer new enrollments, benefit plan and member changes must retain, on-site, all fully completed, original enrollment forms, beneficiary forms, member benefit change forms and confirmation statements. These supporting documents will be required in the case of a Life, AD&D, Disability claim or insurance carrier audit.
- Employer Administrators using the Employer Portal must administer the Plan in compliance with the policy, eligibility rules and insurance carrier requirements. Please refer to plan benefit booklets for policies and provisions.
- Please contact your OASSIS Benefits Administrator with questions or for assistance if required.

LIST ALL NEW AND ALL CONTINUING AUTHORIZED CONTACTS / EMPLOYER PORTAL USERS

1) Plan Administrator / Invoice Contact = Primary Contact - invoices, administration communications & request / administer changes			
Name:		Title:	
Telephone:		Email:	
Address:			
<i>Employer Portal - Online Administration Access:</i>	Read?	Write?	View Monthly Invoices?
2) Executive Director / CEO = Contact for rate renewals / annual reporting communications & request / administer changes			
Name:		Title:	
Telephone:		Email:	
Address:			
<i>Employer Portal - Online Administration Access:</i>	Read?	Write?	View Monthly Invoices?
3) Other Authorized Contact = additional contact permitted to access plan information & request / administer changes			
Name:		Title:	
Telephone:		Email:	
Address:			
<i>Employer Portal - Online Administration Access:</i>	Read?	Write?	View Monthly Invoices?

REMOVE THESE CONTACTS

Name:	Name:	Name:
Plan administration authorization and access to the Employer Portal will be terminated with the removal of the authorized contact.		

CHANGES AUTHORIZED BY:

Employer Authorized Contact Name	Title:
Telephone:	Email:

Please submit this form by **email to your OASSIS Benefits Administrator**. Please call if further assistance is required.

OASSIS 5407 Eglinton Ave. West, Suite 208 Toronto, Ontario M9C 5K6
Phone: 416-781-2258 **Toll Free:** 1-888-233-5580 **Fax:** 647-689-3061

