



CLIENT READY CENSUS™ EMPLOYER GUIDE

Account Registration:

1 E-mail Link

Log in to the **CRC** tool using the registration link that was emailed to you from your broker.

- Click **Register Here**.
- You can copy the **Passcode** from the e-mail. (You will need this information in the next step to complete the registration).

CLIENT READY CENSUS NOTIFICATION



Hello,

This message is to notify you that your broker [redacted] has invited you to complete the census data for your employees through the Client Ready Census™ from BenefitMall. To participate in the census data collection, please click on the link below.

[Register Here](#) ^A
Passcode: /7J7sd7DZDE= ^B

Thank you for using Client Ready Census™ from BenefitMall

**Note: Please do not reply to this message. This email has been sent from an unmonitored email address, and we are unable to respond to your replies.*

www.benefitmall.com

2 Account Registration Page

- The **Account Registration** page displays.
- Paste the passcode you copied from the e-mail in the **Passcode** field.
- Enter your first and last name in the **First** and **Last** name field.
- Enter your e-mail address in the **E-mail Address** field. Enter it a second time for confirmation.
- Enter your password in the **Password** field. Enter it a second time for confirmation.
- Click **Complete Registration**.

Account Registration ^A

Passcode *
/7J7sd7DZDE= ^B

First Name *
First name ^C

Last Name *
Last Name

E-Mail Address (this will be your User ID) *
Email ^D

Confirm E-Mail Address *
Confirm Email

Password * ^E
Password

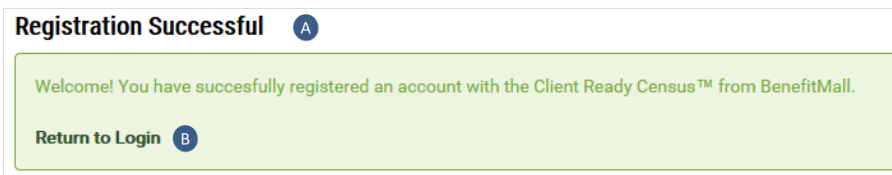
Confirm Password *
Confirm Password

Complete Registration ^F

Client Ready Census™ Employer Guide

3 Registration Successful Page

- A. The **Registration Successful** page displays.
- B. Click **Return to Login**.



Account Login:

4 Account Login Page

- A. The **Account Login** page displays.
- B. Enter your e-mail address.
- C. Enter your password you created during registration.
- D. If you forget your password, you can click **Login Assistance** link. Login assistance can be used only if you forget your password. This will open a new page where you will enter your e-mail address (username) and click **OK**. Click **Submit**. You will receive an e-mail with a link for you to create your new password. Click **Cancel** to return to the **Account Login** page.
- E. **Remember Me**. Check this box to remember your e-mail address the next time you visit the **Account Login** page.
- F. Click **Sign In**.



Client Ready Census™ Employer Guide

Company Information:

5 Company Information Page

- A. The **Company Information** page displays.
- B. The data displayed under **Company Information** is entered and updated by your Broker in CRQS. If you need the information updated, please contact your broker.
- C. Click **Invite Employee**.

The screenshot displays the 'Company Information' page in the Client Ready Census system. At the top left is the CRC logo with the text 'CLIENT READY CENSUS'. A blue navigation bar contains a question mark icon. The main heading 'Company Information' is followed by a 'Submit Census' button. Below this, the client name 'John Client' is shown. The page is divided into two sections: 'Company Information' (labeled B) and 'Broker Contact Information'. The 'Company Information' section displays 'BEVERLY HILLS, CA 90210', 'LOS ANGELES COUNTY', and 'Total # of Employees: 3'. The 'Broker Contact Information' section is currently blank. Below the company information is the 'Employees' section, which includes 'Invite Employees' and 'Add an Employee' buttons (labeled C). The 'Employees' section shows '0 Employees' and a 'Sort by Last Name' dropdown. A table header is visible with columns: EMPLOYEE NAME, DATE OF BIRTH, MARITAL STATUS, # OF CHILDREN, MEDICAL, DENTAL, VISION, LIFE, DISABILITY, and DELETE EMPLOYEE.

Client Ready Census™ Employer Guide

6 Invite Employees

- A. The **Invite Employees** page displays. This page invite employees to complete their census information.
- B. The **Copy Invitation** allows you to copy the text to your clipboard. The text can then be pasted into an e-mail addressed to your employees. The Registration URL in the message will allow employees to register and login to the **Client Ready Census**. The passcode will be the same for all employees.
- C. Click **Close** to return you to the **Company Information** page.
- D. From the **Company Information** page, click **Add an Employee** to manually enter an employee's demographic information on their behalf.

NOTE: When you first access the **Company Information** page, the employee listing will say **0 Employees**. Records would appear in the list once you add an employee or when an employee begins to add their census information.

Invite Employees A

Copy the invitation below and paste it into a new e-mail to your employees.

This message is to notify you that your employer has invited you to complete information about you and your dependents. The information you provide will help your employer select insurance plans and other benefits to provide. To participate, please select the link below:

Registration Url: <http://censustst.benefitmall.com/Account/Register/CRQS/205382/true>
Passcode: GqNx5u14

Thank you for using the Client Ready Census™ from BenefitMall.

Copy Invitation! B C Close

Employees D

Invite Employees Add an Employee

0 Employees Sort by Last Name ▼

EMPLOYEE NAME	DATE OF BIRTH	MARITAL STATUS	# OF CHILDREN	MEDICAL	DENTAL	VISION	LIFE	DISABILITY	DELETE EMPLOYEE
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Client Ready Census™ Employer Guide

Employee Tab Information :

7 Employee Tab Information

- A. This page has three sections: **Employee, Family, Coverage**. You will need to complete the **Employee** tab information section before continuing. The **Family** and **Coverage** tab will be grayed out.
- B. From the **Employee** tab information section, enter the employee's first and last name, date of birth, and gender in the appropriate field.
- C. From the **Contact** section, enter **Home Zip, Home City/County, E-mail Address**.
- D. From the **Employment Information** section, enter the annual salary.
- E. From the **Medical Information** section, select the employee medical information.
- F. Click **Save and Continue**.

Welcome to Client Ready Census™ by BenefitMall. Please provide the information requested below to assist your employer so they may provide you the best possible health benefit plan options.

A Employee	Family	Coverage
Employee		
First Name *	Last Name *	Date of Birth * Gender *
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="radio"/> Male <input checked="" type="radio"/> Female
Contact Information C		Employment Information D
Home Zip * Home City/County *	E-mail Address *	Annual Salary
<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>
Medical Information E		
<input type="checkbox"/> COBRA <input type="checkbox"/> Retired <input type="checkbox"/> Tobacco User		
		F
		<input type="button" value="Back"/> <input type="button" value="Save and Continue"/>

Client Ready Census™ Employer Guide

Family Tab: Information

7 Employee Information (contd.)

- A. The **Family** tab information displays.
- B. From the **What is your marital status?** drop down menu, select your status. If you select **Married** or **Domestic Spouse**, you will need to complete that section.
- C. Click **Add Child(ren)**.
- D. Enter your child's information. All the required fields are marked with *
- E. Click **Save and Continue**.

Welcome to Client Ready Census™ by BenefitMall. Please provide the information requested below to assist your employer so they may provide you the best possible health benefit plan options.

Employee

Family **A**

Coverage

What is your marital status? *

Single

B ▼

1

C Add Child(ren)

Child 1 **D**

First Name *

Last Name *

Date of Birth *

Gender *

Male Female

Contact Information

Home Zip *

Home City/County *

Tobacco User

Disabled

Medical Information

E
Back

Save and Continue

Client Ready Census™ Employer Guide

Coverage Tab Information:

7 Employee Information (contd.)

A. From the drop down menu, select the **Medical, Dental, Vision, Life, and Disability** options.

Note: Waived means coverage is offered elsewhere. **Declined** means you are not electing coverage.

B. Click **Save and Confirm**.

Welcome to Client Ready Census™ by BenefitMall. Please provide the information requested below to assist your employer so they may provide you the best possible health benefit plan options.

Employee






Family

Coverage

Select a level of coverage (who will be covered) for each of the available options.

IMPORTANT: You are not enrolling in benefits coverage at this time.

The information you provide is intended as a summary only. This information will assist your employer in selecting benefit plans to offer. Benefits may contain limitations and exclusions. Benefits cannot be guaranteed in advance and are subject to change by the insurer without notice. Always refer to insurer publications to verify benefits and plan availability.

 Medical	Employee Only <input type="button" value="v"/>
 Dental	Employee Only <input type="button" value="v"/>
 Vision	Employee Only <input type="button" value="v"/>
 Life	Employee Only <input type="button" value="v"/>
 Disability	Declined (Not Electing) <input type="button" value="v"/>

A

B

Back

Save and Confirm

Client Ready Census™ Employer Guide

Review and Confirm Employee Information:

8 Review and Confirm Employee Information Page

- A. The **Review and Confirm Employee Information** page displays for your review.
- B. If you need to make any changes, click **Edit**.
- C. Click **Confirm and Submit** to return to the **Company Information** page. This will generate a confirmation message and send an e-mail to you.

Review and Confirm Employee Information A

Marylue Call

General Information

Gender	Female
Date of Birth	09/26/1980
Marital Status	Single

Location Information

Home (90210)	BEVERLY HILLS, LOS ANGELES
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Health Information

Retired	No
COBRA	Yes
Tobacco User	No

Coverage Elections

 Medical	Employee Only
 Dental	Employee Only
 Vision	Employee Only
 Life	Employee Only
 Disability	Declined

B[Edit](#)C[Confirm and Submit](#)

Client Ready Census™ Employer Guide

Company Information/Employees:

9 Company Information/Employees

- A. **Employees**—This displays the total employee count.
- B. **Sort by**—This drop down menu allows you to sort the employee listing by (a) **First Name** or **Last Name**.
- C. **Employee Status**—The green checkmark indicates the employee has entered, reviewed, and confirmed their information and submitted to you.
- D. **Timer icon**— This indicates the employee has not completed and confirmed their information or you have not completed on their behalf.
- E. Click the **Delete icon** to delete an employee from this list. A **confirmation box** will appear. This action cannot be undone.
- F. Click **Submit Census** to send your completed employee census to your broker.

Company Information

F Submit Census

John Client

BEVERLY HILLS, CA 90210
LOS ANGELES COUNTY
Total # of Employees: 3

Broker Contact Information

Employees

Invite Employees

Add an Employee

4 Employees A

B Sort by Last Name v

	EMPLOYEE NAME	DATE OF BIRTH	MARITAL STATUS	# OF CHILDREN	MEDICAL	DENTAL	VISION	LIFE	DISABILITY	DELETE EMPLOYEE
✓	Marylue Call	Sep 26, 1980	Single	0	EE	EE	EE	EE	D	Delete E
✓	Amy client	Sep 27, 1979	Single	1	EE	EE	EE	EE	D	Delete
✓ C	Manny Family	Sep 27, 1999	Single	0	EE	EE	EE	EE	D	Delete
⌚ D	Tom Tester	Jul 25, 1980	Single	0	EE	EE	EE	EE	D	Delete

Client Ready Census™ Employer Guide

Submit Census Confirmation:

10 Confirm Message displays

- A. Click **Cancel** to return to the **Company Information** page.
- B. Click **OK** to confirm. You and your broker will receive an e-mail confirming the census has been submitted.

NOTE: You and your employees cannot edit the census information after submitting the census. When employees login to the system, they will be redirected to the Employee information review page. If any changes need to be made to the census, please contact your broker.

- C. **You have successfully submitted your employee census information** message will appear.

Your process is now completed.

The screenshot displays the 'Company Information' page for 'John Client'. A 'Confirm' dialog box is overlaid, asking 'Are you sure you want to submit your census information?' with 'Cancel' and 'OK' buttons. The background shows company details for 'John Client' and a table of 4 employees.

EMPLOYEE NAME	DATE OF BIRTH	MARITAL STATUS	# OF CHILDREN	MEDICAL	DENTAL	VISION	LIFE	DISABILITY	DELETE EMPLOYEE
✓ Marylue Call	Sep 26, 1980	Single	0	EE	EE	EE	EE	D	Delete
✓ Amy client	Sep 27, 1979	Single	1	EE	EE	EE	EE	D	Delete
✓ Manny Family	Sep 27, 1999	Single	0	EE	EE	EE	EE	D	Delete
✓ Tom Tester	Jul 25, 1980	Single	0	EE	EE	EE	EE	D	Delete

✓ Thank you. You have successfully submitted your employee census information. C