Group Advisor Portal User Guide

February 2025

Introduction

For us, it's personal
Outstanding person-to-person service, secure online self-service solutions, and a friendly, local Account Executive team are at the heart of how we serve you.

For more than 75 years, Saskatchewan Blue Cross has been recognized as an organization that delivers with people at the heart of every interaction. We believe in a personalized, thoughtful, and highly responsive experience. Each step with us is infused with customized care. With full-service offices located in both Saskatoon and Regina, we

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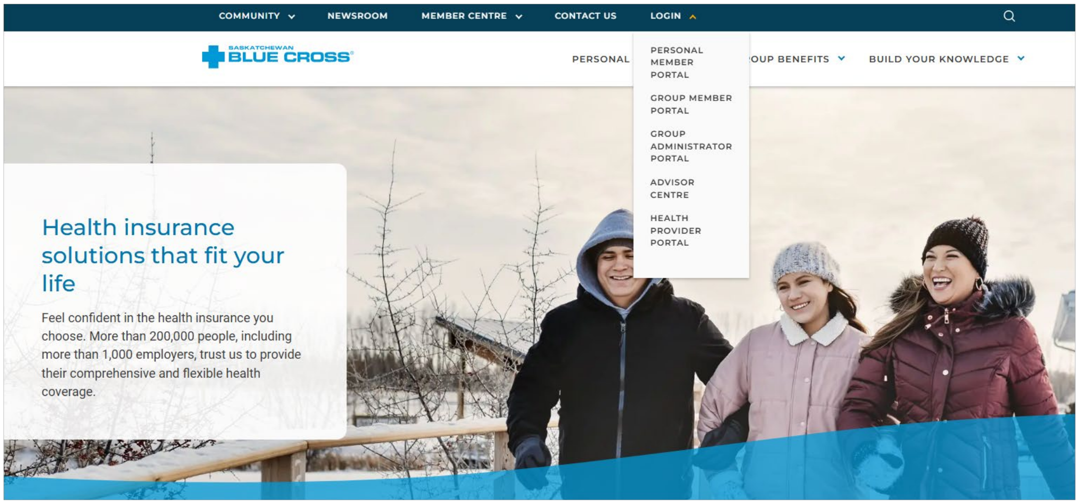
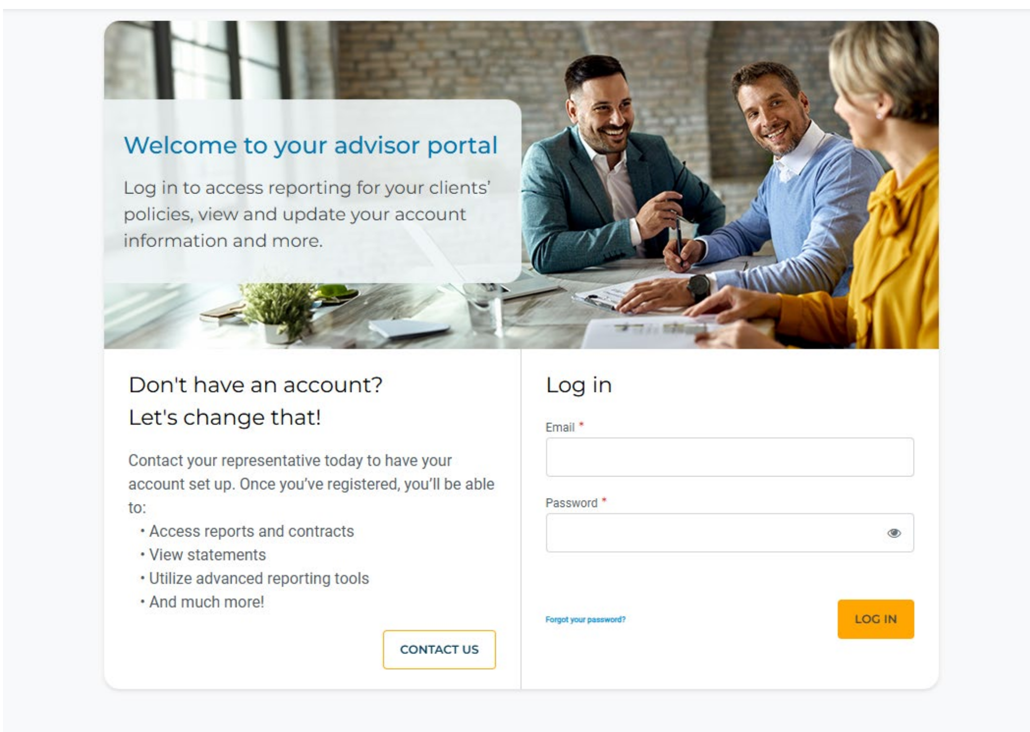
Logging-In

Visit www.sk.bluecross.ca and click LOGIN found within the navy toolbar. Select Advisor Centre from the dropdown menu.



Or use the direct link here: https://portal.sk.bluecross.ca/Broker/

The Advisor Portal will open in a new window.



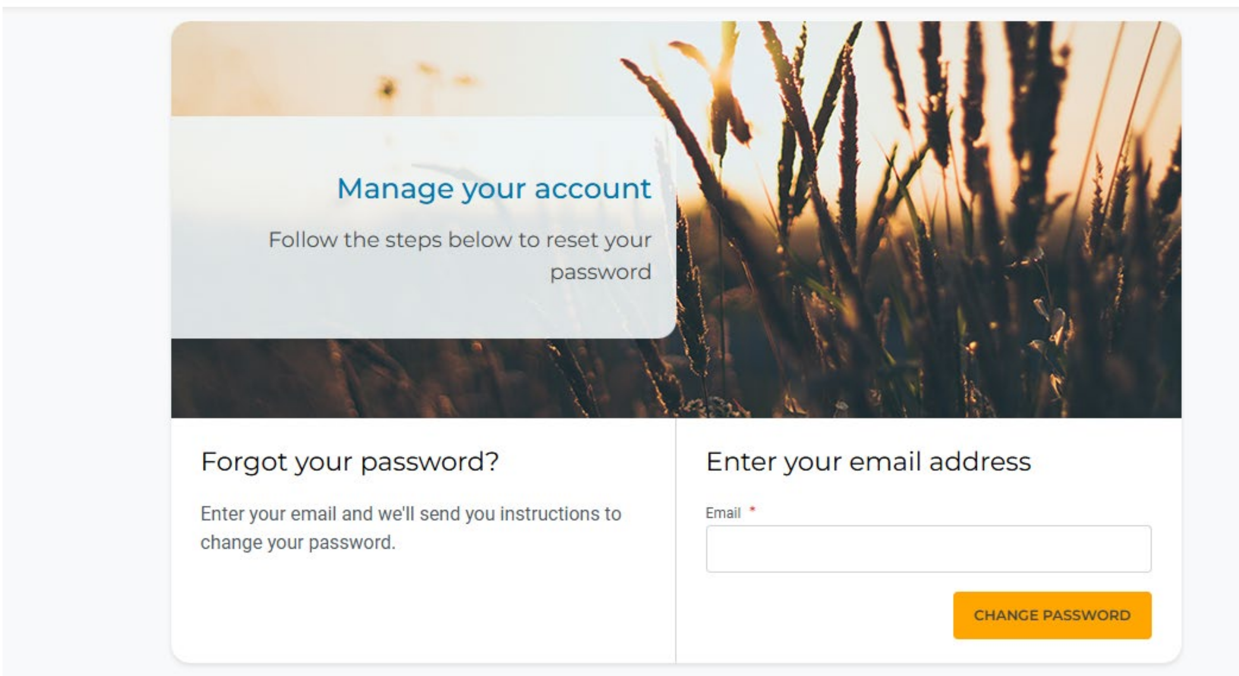
First Time Users

Once your access has been granted you will receive an email from Saskatchewan Blue Cross letting you know that your account is ready. Follow the link and password creation instruction to get started!

Returning Users

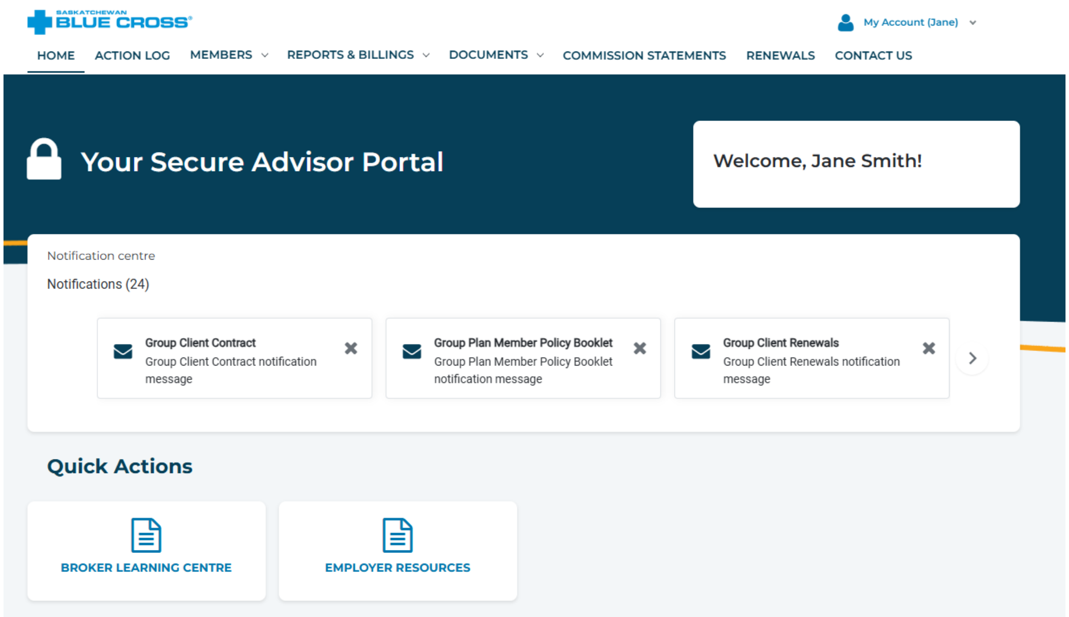
Simply enter your Email and Password, along the left side of the screen and click Log In.

Forgot your Password? Click the Forgot your Password link, enter in your email address and click Change Password. A secure email will be sent with instructions on how to set a new password.



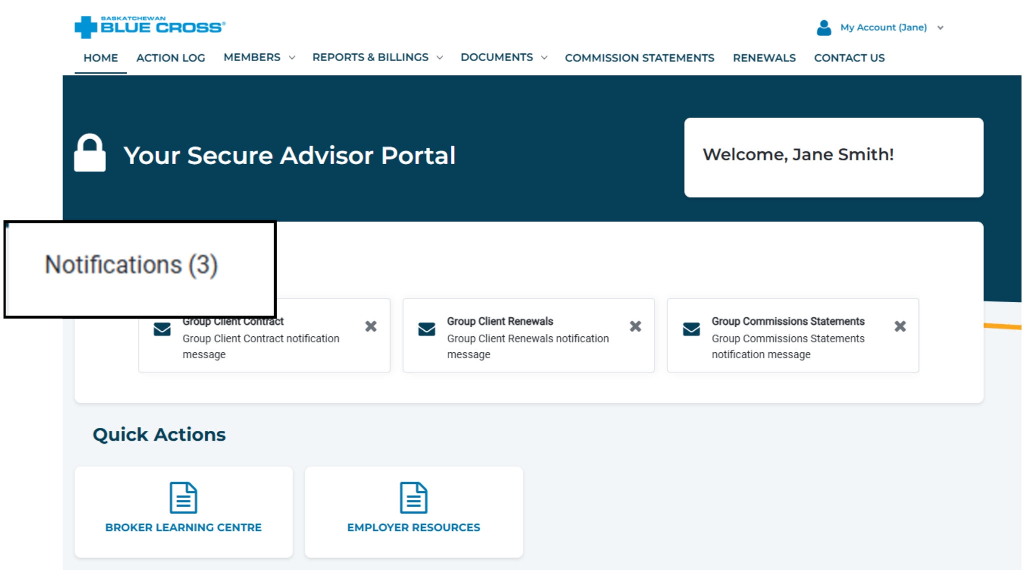
Main Navigation & Landing Page

The Advisor Portal is an all-in-one platform combining the robust features of the Plan Administrator Portal with additional tools and functionality specifically for Advisors. Advisors will be welcomed to their user-friendly, interactive site.



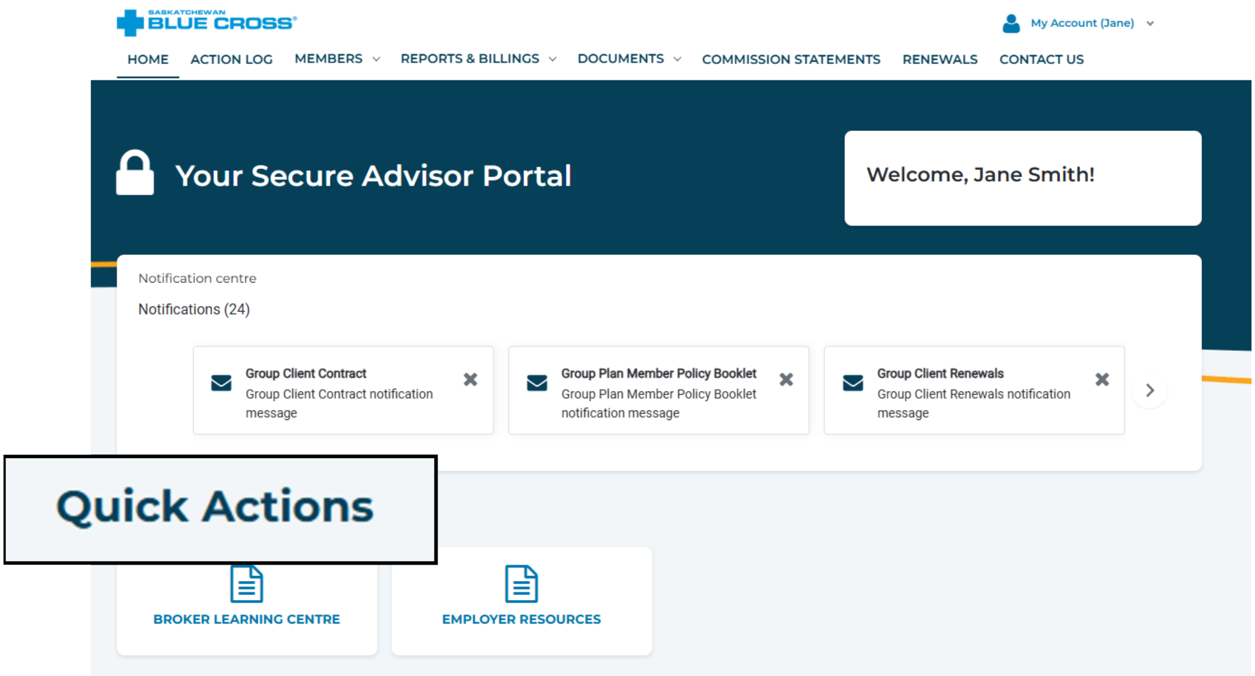
Notification Centre

Notifications, Announcements and Alerts can be viewed and acknowledged here. Advisors will also receive email notices when there is activity or action required in the Advisor Portal.



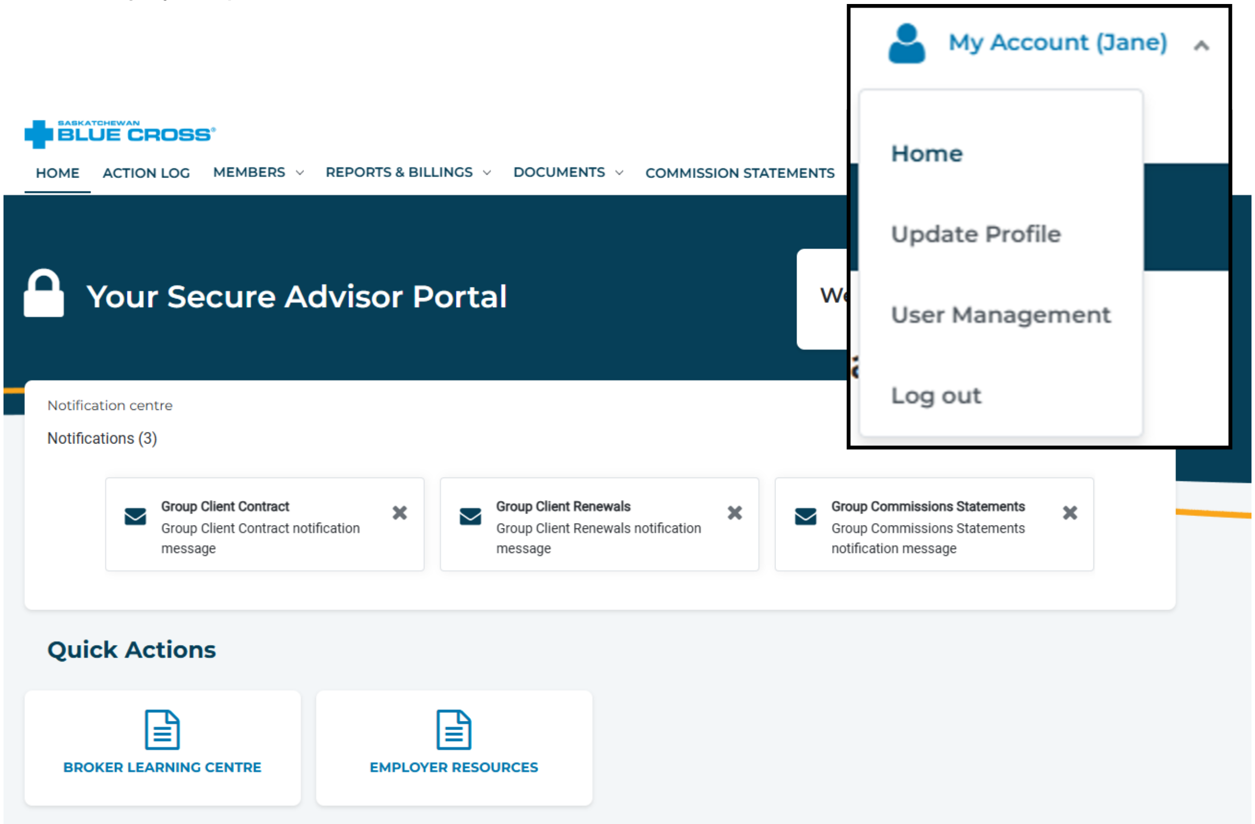
Quick Links

Quick Links are shortcuts that give Advisors direct access to frequently used resources.



My Account

The My Account section is where Advisors can easily view and update portal account details and change your password.



User Management

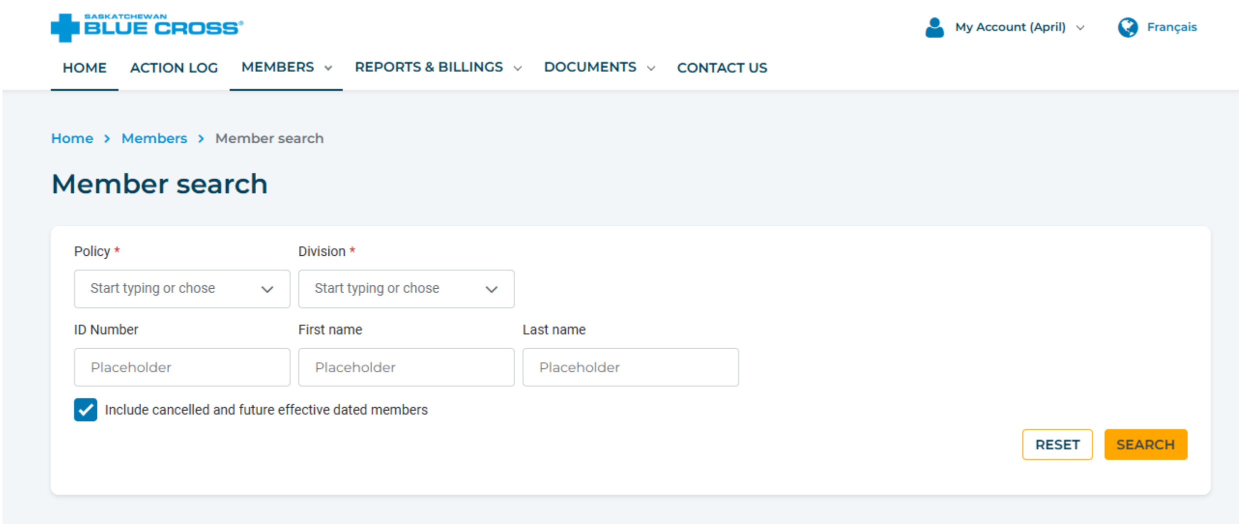
This feature is available to designated Advisors. It allows users to manage other Advisor accounts, within your organization, in near-real time. Advisors with User Management access are able to:

- Edit Existing Advisor Accounts
- Add New Advisor Accounts
- Remove Advisor Accounts
- Password Reset for Existing Advisor Accounts

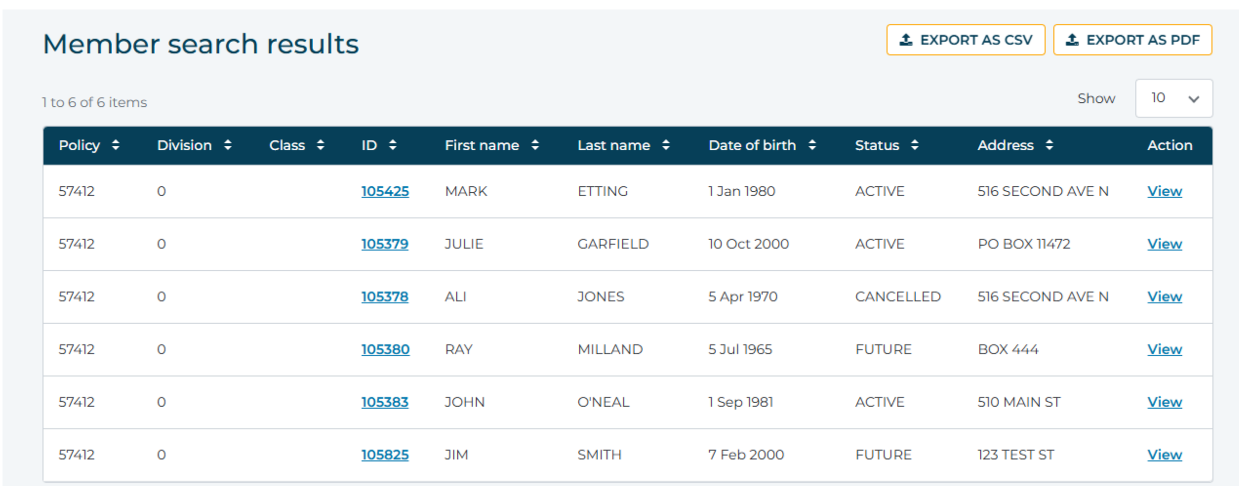
Enrolment

Member Search

This powerful search tool helps quickly locate members within your client's plans. Use the blue check box to include or exclude canceled or future effective dated members.



Results can be viewed or exported. Member details can be viewed by selecting the Member's ID.



Member search results

EXPORT AS CSV EXPORT AS PDF

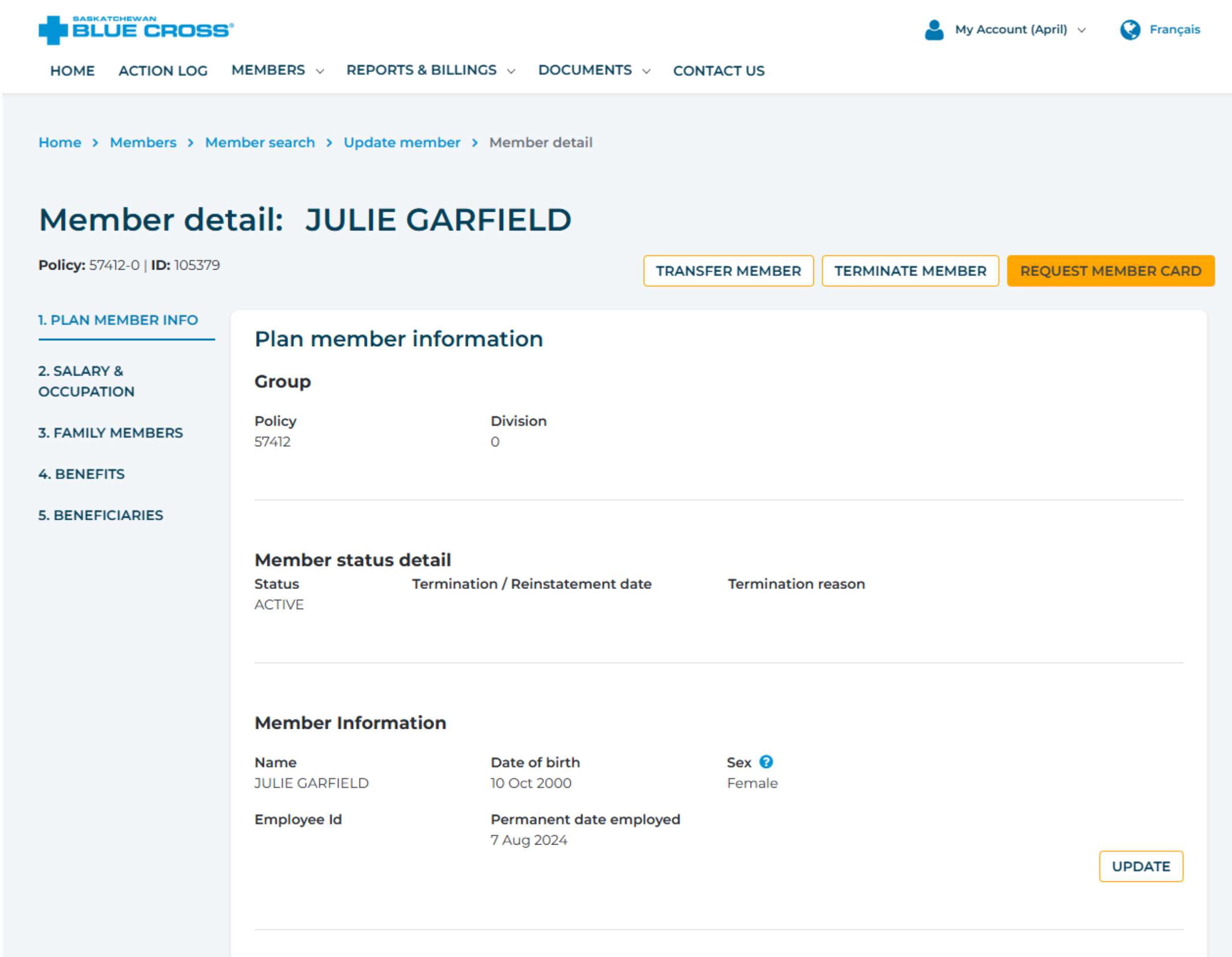
1 to 6 of 6 items

Show 10

Policy	Division	Class	ID	First name	Last name	Date of birth	Status	Address	Action
57412	0		105425	MARK	ETTING	1 Jan 1980	ACTIVE	516 SECOND AVE N	View
57412	0		105379	JULIE	GARFIELD	10 Oct 2000	ACTIVE	PO BOX 11472	View
57412	0		105378	ALI	JONES	5 Apr 1970	CANCELLED	516 SECOND AVE N	View
57412	0		105380	RAY	MILLAND	5 Jul 1965	FUTURE	BOX 444	View
57412	0		105383	JOHN	O'NEAL	1 Sep 1981	ACTIVE	510 MAIN ST	View
57412	0		105825	JIM	SMITH	7 Feb 2000	FUTURE	123 TEST ST	View

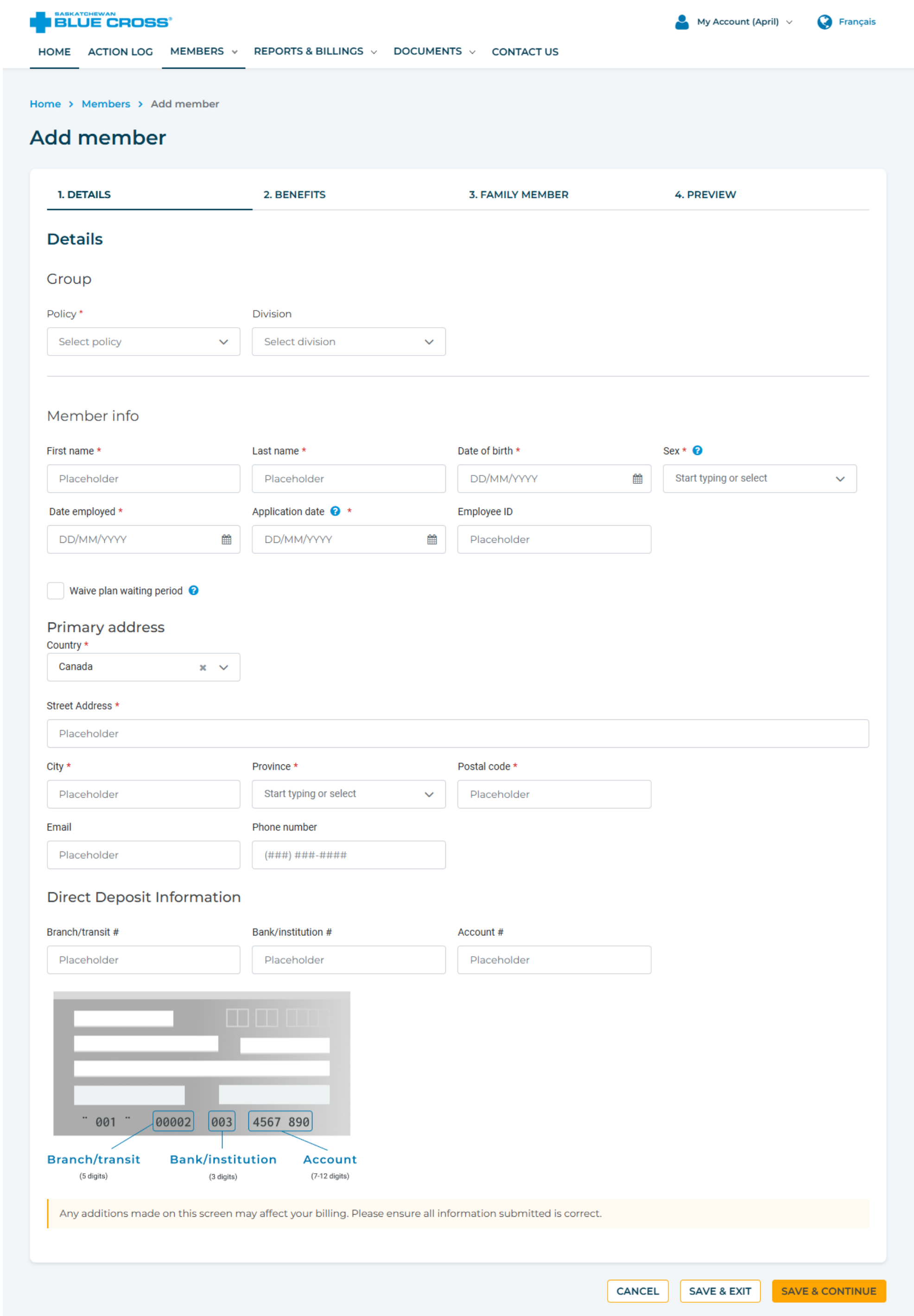
Eligibility Changes

A variety of transactions can be managed within the Member Detail area. Advisor users, with edit permissions, can transfer, terminate, add or remove family members, update salary and occupation, add, remove or change benefits, update beneficiaries and more.



New Member

Adding a new member is a streamlined experience, guided by required fields, tooltips and clear instructions. Advisor users have the ability to preview the New Member prior to submitting the transaction.



1. DETAILS | 2. BENEFITS | 3. FAMILY MEMBER | 4. BENEFICIARIES | 5. SALARY & OCCUPATION | 6. HSA | 7. PREVIEW

Benefits

Please ensure employee salary and beneficiary information is updated & accurate

Health

Benefit	Waive reason
Class A All Employees Health Age 70 & Over	Select...
Class A All Employees Health under 70	Select...
Class A All Employees Second Opinion	Select...
Class B All Owners Health Age 70 & Over	Select...
Class B All Owners Health Under Age 70	Select...

Dental

Benefit	Waive reason
Class A All Employees Dental	Select...
Class B All Owners Dental	Select...

Life

Benefit	Waive reason	Coverage amount
Class A All Employees AD&D	This benefit cannot be waived	
Class A All Employees CI	This benefit cannot be waived	
Class A All Employees Dependent Life	This benefit cannot be waived	
Class A All Employees Life	This benefit cannot be waived	
Class A All Employees Optional Life	This benefit cannot be waived	Coverage amount
Class B All Owners Life	This benefit cannot be waived	

Disability

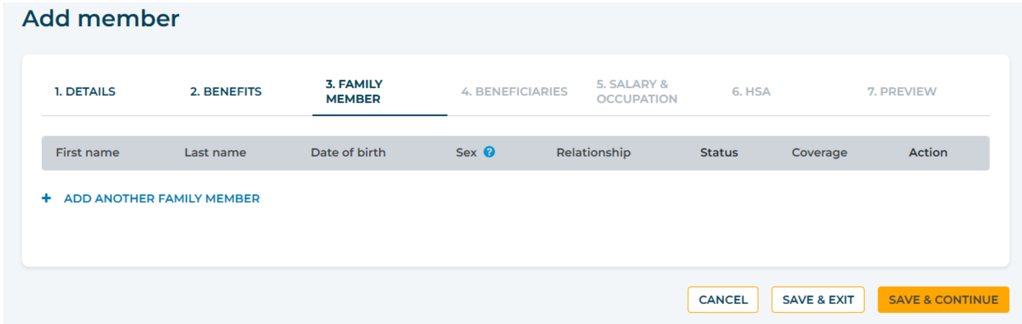
Benefit	Waive reason	Coverage amount
Class A All Employees LTD	This benefit cannot be waived	
Class A All Employees WI	This benefit cannot be waived	
Class B All Owners LTD	This benefit cannot be waived	
Class B All Owners WI	This benefit cannot be waived	

Spending Account

Benefit	Waive reason
Class A All Employees HSA	Select...
Class A All Employees PWA	Select...

Any changes made on this screen may affect your bill. Please check your statement to ensure all information is correct.

CANCEL | SAVE & EXIT | SAVE & CONTINUE



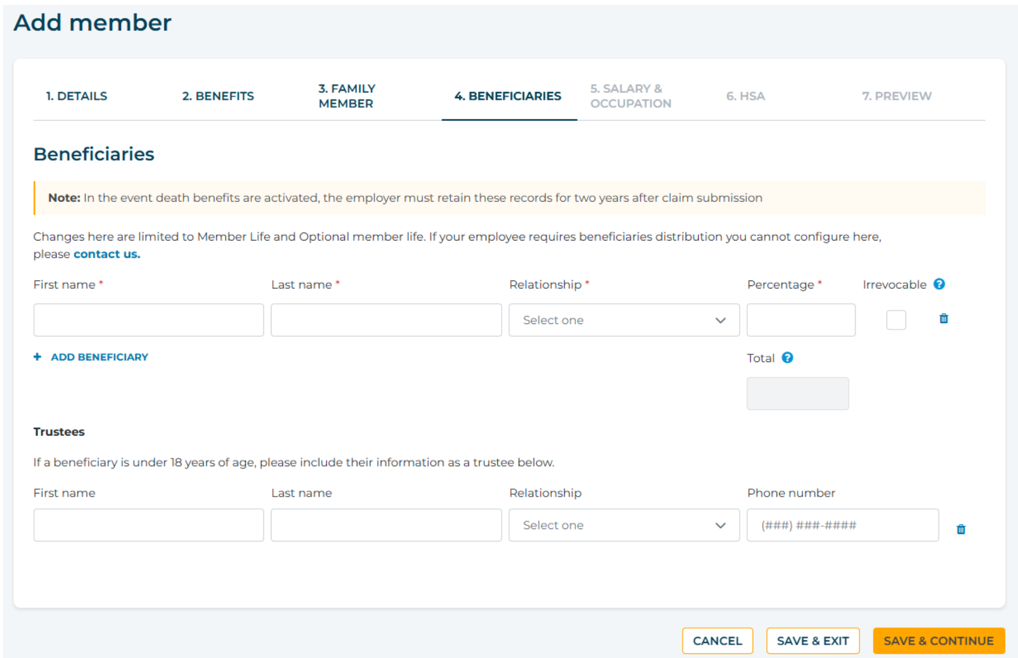
Add member

1. DETAILS | 2. BENEFITS | 3. FAMILY MEMBER | 4. BENEFICIARIES | 5. SALARY & OCCUPATION | 6. HSA | 7. PREVIEW

First name	Last name	Date of birth	Sex	Relationship	Status	Coverage	Action

+ ADD ANOTHER FAMILY MEMBER

CANCEL | SAVE & EXIT | SAVE & CONTINUE



Add member

1. DETAILS | 2. BENEFITS | 3. FAMILY MEMBER | 4. BENEFICIARIES | 5. SALARY & OCCUPATION | 6. HSA | 7. PREVIEW

Beneficiaries

Note: In the event death benefits are activated, the employer must retain these records for two years after claim submission

Changes here are limited to Member Life and Optional member life. If your employee requires beneficiaries distribution you cannot configure here, please **contact us.**

First name * | Last name * | Relationship * | Percentage * | Irrevocable

Select one

+ ADD BENEFICIARY

Total

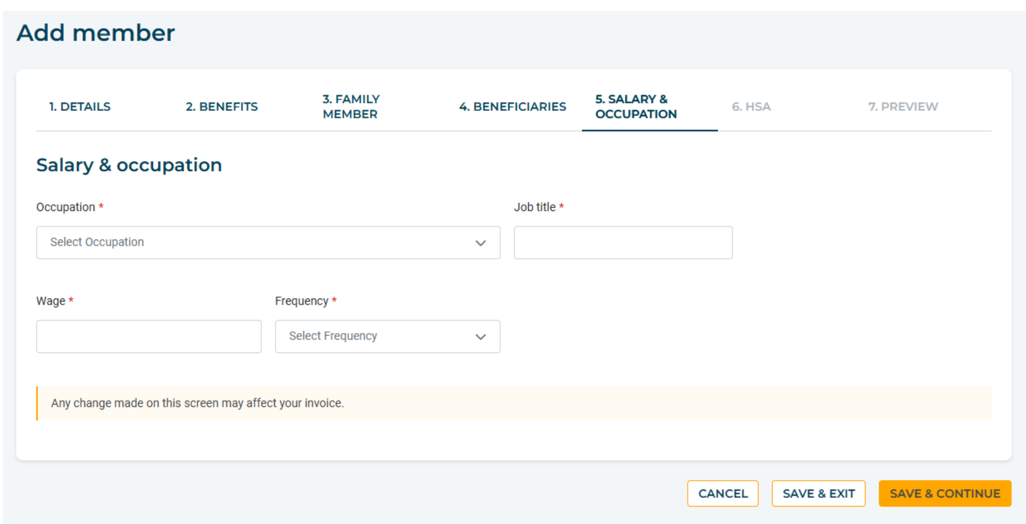
Trustees

If a beneficiary is under 18 years of age, please include their information as a trustee below.

First name | Last name | Relationship | Phone number

Select one | (###) ###-####

CANCEL | SAVE & EXIT | SAVE & CONTINUE



Add member

1. DETAILS | 2. BENEFITS | 3. FAMILY MEMBER | 4. BENEFICIARIES | 5. SALARY & OCCUPATION | 6. HSA | 7. PREVIEW

Salary & occupation

Occupation * | Job title *

Select Occupation

Wage * | Frequency *

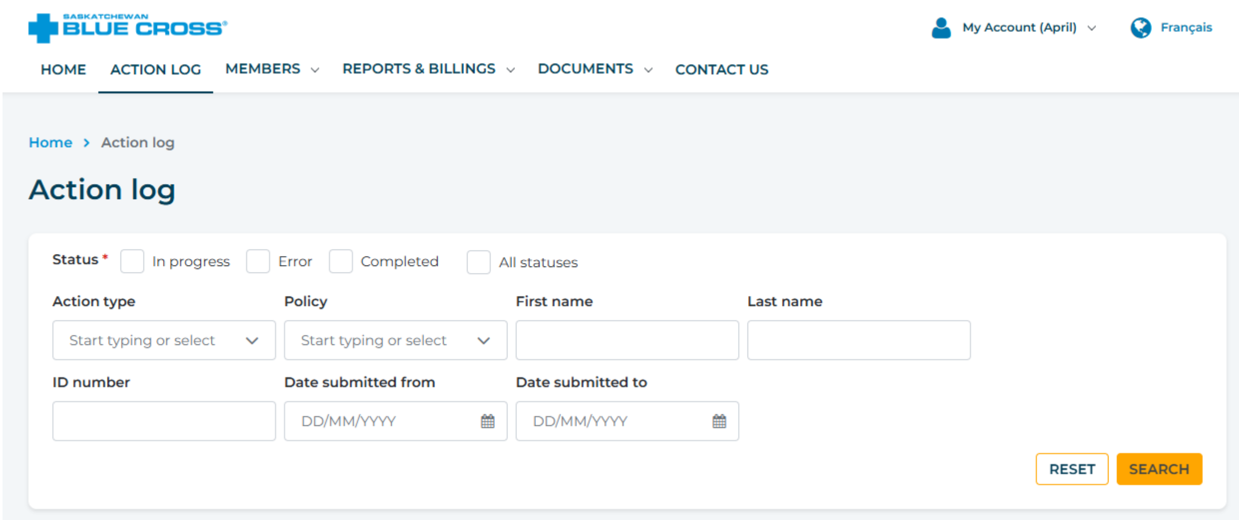
Select Frequency

Any change made on this screen may affect your invoice.

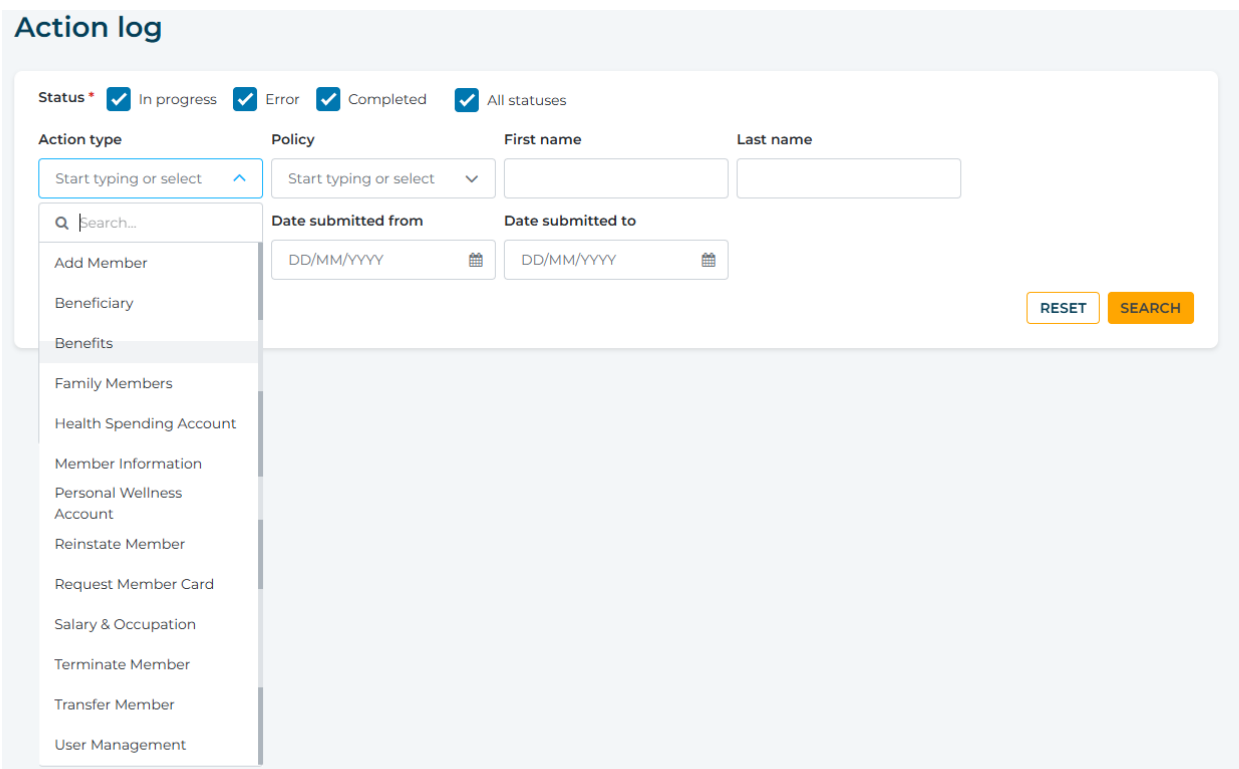
CANCEL | SAVE & EXIT | SAVE & CONTINUE

Action Log

Search tool to allow users to view or export a complete record of transactions processed on the portal, including those that are in progress or completed.



Advisor users can filter Action Types or search all.



Search Results are returned on the screen or can be downloaded in excel.

Search results

1 to 3 of 3 items

Show 10

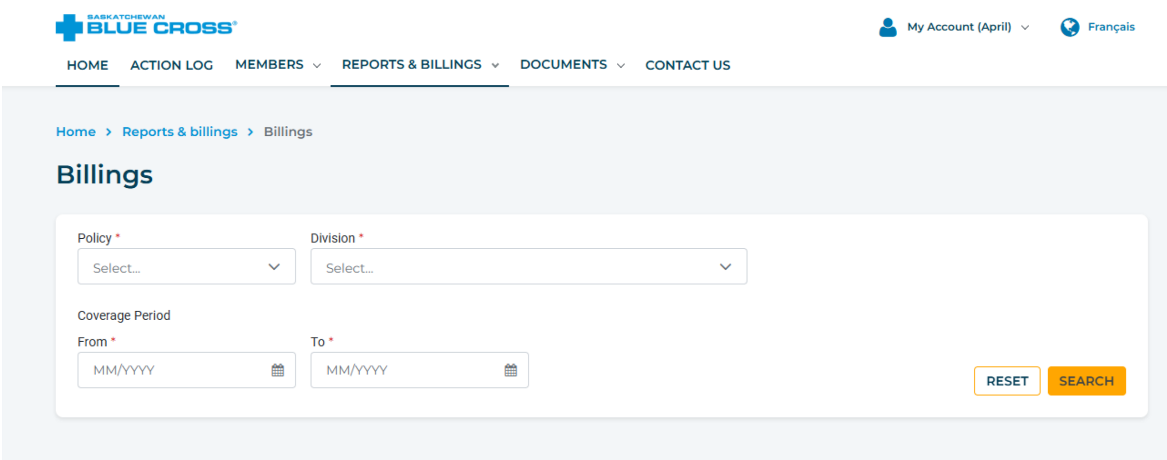
DOWNLOAD

Status	Action type	First name	Last name	Policy	ID	Submitted date
Completed	Request Member Card	BUSTER	BUGS	92291	000105441	15 Jan 2025 15:12:08
Completed	Request Member Card	TANNIS	KAMINSKI	92292	080103225	10 Jan 2025 12:59:12
Completed	Request Member Card	RUBY ANN	CHI	50497	000105382	10 Jan 2025 08:59:02

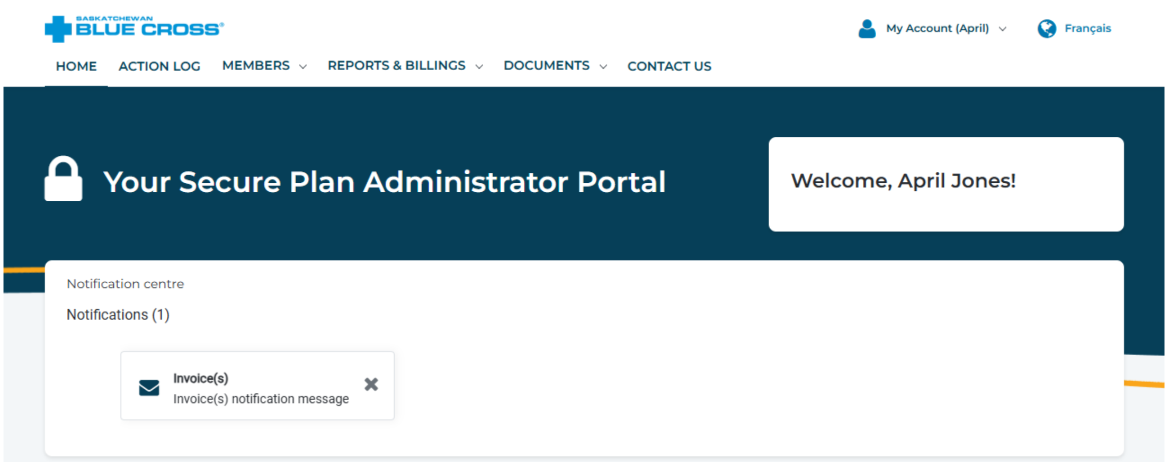
If a transaction is in progress, Advisor users can return to the transaction from the Action Log.

Billing

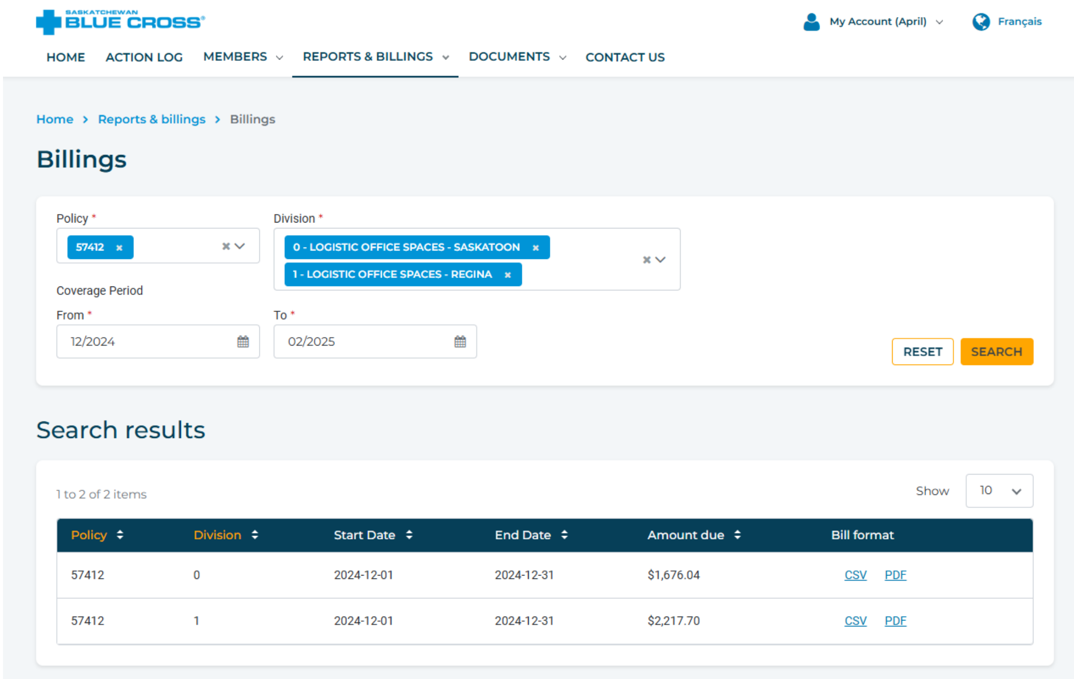
The Billing can be found under the Reports & Billings tab. Users can search by Policy, Division and Coverage Period.



Users will receive a Notification and email when new billings are available.



Each Bill is available in both CVS and PDF.



The PDF version will contain the following sections:

- Statement of Account

SASKATCHEWAN BLUE CROSS

Group	57412	LOGISTIC OFFICE SPACES - SASKATOON	Issue Date	Jan 07, 2025
Roll Number	0	Statement of Account for Dec 2024	Due Date	UPON RECEIPT
Invoice	SBC1225912			

Client Administration
Representative

Group Benefits Service

Total Payable $1,676.04

Please return this page with your payment to
SASKATCHEWAN BLUE CROSS, P.O. BOX 4030 516 2ND AVENUE NORTH, SASKATOON, SK S7K 3T2

Please write invoice number on cheque

LOGISTIC OFFICE SPACES - SASKATOON
516 SECOND AVE N
SASKATOON SK S7K 3T2

SASKATCHEWAN BLUE CROSS

Group	57412	LOGISTIC OFFICE SPACES - SASKATOON	Issue Date Jan 07, 2025
Roll Number	0	Statement of Account for Dec 2024	Due Date UPON RECEIPT
Invoice	SBC1225912		

Inquiries about your bill?

Contact Group Benefits Service
Telephone 306-667-5861
Email GroupServiceCentre@sk.bluecross.ca

Please retain this page for your records

ACCOUNT SUMMARY

Previous Charges

Previous Amount Billed	$466.86	
Previous Amount Paid	$0.00	
Outstanding Balance		$466.86

Current Charges

Current Amount Billed	$1,209.18	
Adjustments	$0.00	
8% Ontario Sales Tax	$0.00	
9% Quebec Sales Tax	$0.00	
Current Balance		$1,209.18
Total Payable Due UPON RECEIPT		$1,676.04

Saskatchewan Blue Cross, P.O. Box 4030 516 2nd Avenue North, Saskatoon, SK S7K 3T2 Telephone 1-800-667-6853

- Benefit Information Summary

SASKATCHEWAN BLUE CROSS

LOGISTIC OFFICE SPACES - SASKATOON
Benefit Information Summary

Issue Date Jan 07, 2025

Plan/Class	Status	Number of Employees	Volume	Current	Adjustments	Billed
Class A All Employees Dental	Single	1		$29.45	$0.00	$29.45
	Couple	1		$86.26	$0.00	$86.26
Class A All Employees Health under 70	Single	1		$69.86	$0.00	$69.86
	Couple	1		$181.39	$0.00	$181.39
Class A All Employees Second Opinion	Single	1		$1.00	$0.00	$1.00
	Couple	1		$1.00	$0.00	$1.00
Class B All Owners Dental	Family	1		$86.26	$0.00	$86.26
Class B All Owners Health Under Age 70	Family	1		$107.60	$0.00	$107.60
Class A All Employees AD&D		2	195,000	$8.78	$0.00	$8.78
Class A All Employees CI		2	100,000	$55.75	$0.00	$55.75
Class A All Employees Dependent Life		1		$2.72	$0.00	$2.72
Class A All Employees LTD		2	4,292	$115.54	$0.00	$115.54
Class A All Employees Life		2	195,000	$47.97	$0.00	$47.97
Class A All Employees WI		2	2,000	$142.60	$0.00	$142.60
Class B All Owners LTD		1	5,000	$122.50	$0.00	$122.50
Class B All Owners Life		1	250,000	$61.50	$0.00	$61.50
Class B All Owners WI		1	1,000	$89.00	$0.00	$89.00
Total Billed			**752,292**	**$1,209.18**	**$0.00**	**$1,209.18**

SK

- Billing Revision

SASKATCHEWAN BLUE CROSS

LOGISTIC OFFICE SPACES - SASKATOON

Benefit Information Summary

Issue Date Jan 07, 2025

Plan/Class	Status	Number of Employees	Volume	Current	Adjustments	Billed
Class A All Employees Dental	Single	1		$29.45	$0.00	$29.45
	Couple	1		$86.26	$0.00	$86.26
Class A All Employees Health under 70	Single	1		$69.86	$0.00	$69.86
	Couple	1		$181.39	$0.00	$181.39
Class A All Employees Second Opinion	Single	1		$1.00	$0.00	$1.00
	Couple	1		$1.00	$0.00	$1.00
Class B All Owners Dental	Family	1		$86.26	$0.00	$86.26
Class B All Owners Health Under Age 70	Family	1		$107.60	$0.00	$107.60
Class A All Employees AD&D		2	195,000	$8.78	$0.00	$8.78
Class A All Employees CI		2	100,000	$55.75	$0.00	$55.75
Class A All Employees Dependent Life		1		$2.72	$0.00	$2.72
Class A All Employees LTD		2	4,292	$115.54	$0.00	$115.54
Class A All Employees Life		2	195,000	$47.97	$0.00	$47.97
Class A All Employees WI		2	2,000	$142.60	$0.00	$142.60
Class B All Owners LTD		1	5,000	$122.50	$0.00	$122.50
Class B All Owners Life		1	250,000	$61.50	$0.00	$61.50
Class B All Owners WI		1	1,000	$89.00	$0.00	$89.00
Total Billed			**752,292**	**$1,209.18**	**$0.00**	**$1,209.18**

- Billing Detail by Employee

SASKATCHEWAN BLUE CROSS

LOGISTIC OFFICE SPACES - SASKATOON

Issue Date Jan 07, 2025

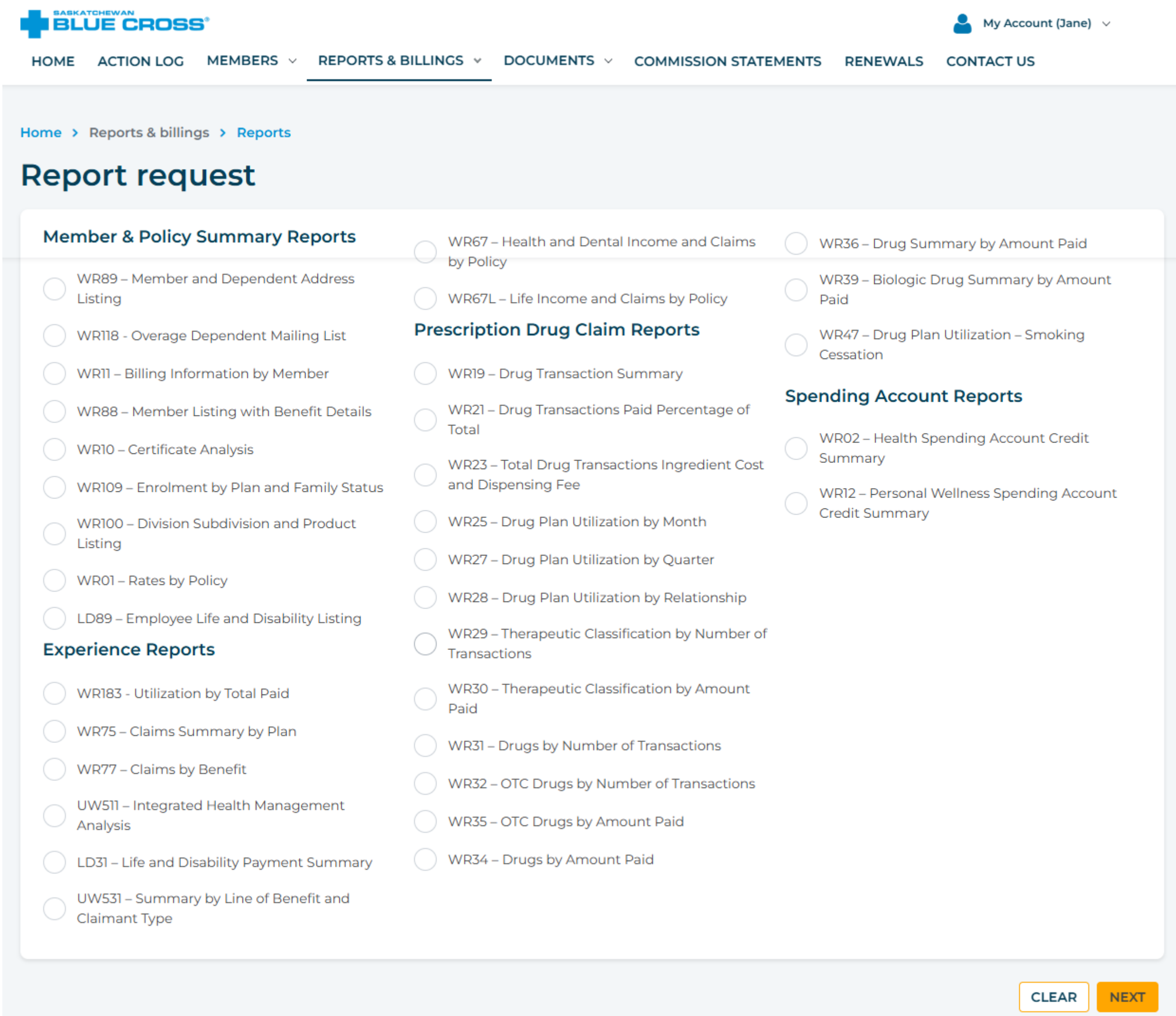
Blue Cross Number	Employee Number	Name	Coverage Period	Plan/Class	Status	Volume	Billed	Employer	Member
105379		GARFIELD, JULIE	Dec 01, 2024 - Dec 31, 2024	Class A All Employees Dental	Single		$29.45	$29.45	$0.00New subscription
				Class A All Employees Health under 70	Single		$69.86	$69.86	$0.00
				Class A All Employees Second Opinion	Single		$1.00	$1.00	$0.00
				Class A All Employees AD&D		65,000	$2.93	$0.00	$2.93
				Class A All Employees CI		50,000	$24.50	$0.00	$24.50
				Class A All Employees LTD		1,792	$48.24	$0.00	$48.24
				Class A All Employees Life		65,000	$15.99	$0.00	$15.99
				Class A All Employees WI		1,000	$71.30	$0.00	$71.30
					Total Billed		**$263.27**		
105378		JONES, ALI	Dec 01, 2024 - Dec 31, 2024	Class A All Employees Dental	Couple		$86.26	$86.26	$0.00New subscription
				Class A All Employees Health under 70	Couple		$181.39	$181.39	$0.00
				Class A All Employees Second Opinion	Couple		$1.00	$1.00	$0.00
				Class A All Employees AD&D		130,000	$5.85	$0.00	$5.85
				Class A All Employees CI		50,000	$31.25	$0.00	$31.25
				Class A All Employees Dependent Life			$2.72	$0.00	$2.72
				Class A All Employees LTD		2,500	$67.30	$0.00	$67.30
				Class A All Employees Life		130,000	$31.98	$0.00	$31.98
				Class A All Employees WI		1,000	$71.30	$0.00	$71.30
					Total Billed		**$479.05**		
105383		O'NEAL, JOHN	Dec 01, 2024 - Dec 31, 2024	Class B All Owners Dental	Family		$86.26	$86.26	$0.00
				Class B All Owners Health Under Age 70	Family		$107.60	$107.60	$0.00
				Class B All Owners LTD		5,000	$122.50	$0.00	$122.50
				Class B All Owners Life		250,000	$61.50	$0.00	$61.50
				Class B All Owners WI		1,000	$89.00	$0.00	$89.00
					Total Billed		**$466.86**		

The CVS version is an Excel spreadsheet data file

A	B	C	D	E	F	G	H	I	J
Contract	Employee Numb	First Name	Last Name	Start Date	End Date	Plan	Family Status	Volumes	Billed Amount
105378		ALI	JONES	20241201	20241231	Class A All Employees AD&D	Single	130,000	5.85
105378		ALI	JONES	20241201	20241231	Class A All Employees CI	Couple	50,000	31.25
105378		ALI	JONES	20241201	20241231	Class A All Employees Dental	Couple		86.26
105378		ALI	JONES	20241201	20241231	Class A All Employees Dependent Life	Couple		2.72
105378		ALI	JONES	20241201	20241231	Class A All Employees Health under 70	Couple		181.39
105378		ALI	JONES	20241201	20241231	Class A All Employees LTD	Single	2,500	67.3
105378		ALI	JONES	20241201	20241231	Class A All Employees Second Opinion	Couple		1
105378		ALI	JONES	20241201	20241231	Class A All Employees Life	Single	130,000	31.98
105378		ALI	JONES	20241201	20241231	Class A All Employees WI	Single	1,000	71.3
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees AD&D	Single	65,000	2.93
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees CI	Single	50,000	24.5
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees Dental	Single		29.45
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees Health under 70	Single		69.86
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees LTD	Single	1,792	48.24
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees Second Opinion	Single		1
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees Life	Single	65,000	15.99
105379		JULIE	GARFIELD	20241201	20241231	Class A All Employees WI	Single	1,000	71.3
105383		JOHN	O'NEAL	20241201	20241231	Class B All Owners Dental	Family		86.26
105383		JOHN	O'NEAL	20241201	20241231	Class B All Owners Health Under Age 70	Family		107.6
105383		JOHN	O'NEAL	20241201	20241231	Class B All Owners LTD	Single	5,000	122.5
105383		JOHN	O'NEAL	20241201	20241231	Class B All Owners Life	Single	250,000	61.5
105383		JOHN	O'NEAL	20241201	20241231	Class B All Owners WI	Single	1,000	89

Reporting

Our powerful reporting features give Advisors access to comprehensive, real-time data. Each report has intuitive parameters that provide flexibility while providing a streamlined report generation process. Each report is available in PDF or Excel.

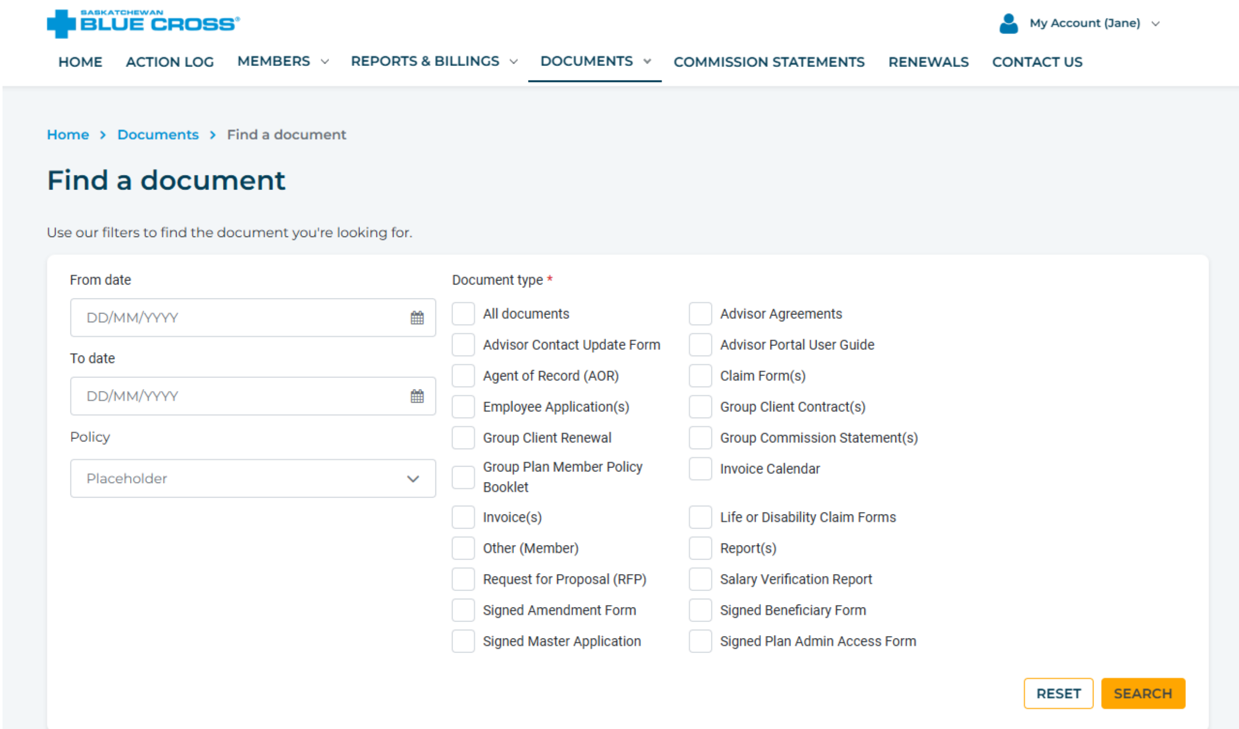


If generating in PDF, a preview of the report can be seen before downloading the report. If generating in Excel, choose the download button to view and save the report.

Select report parameters (for example Division and Subdivision) will pre-populate based on the set-up of the group. 'Policy' will also display as 'Billing Group' or 'Roll' on applicable reports.

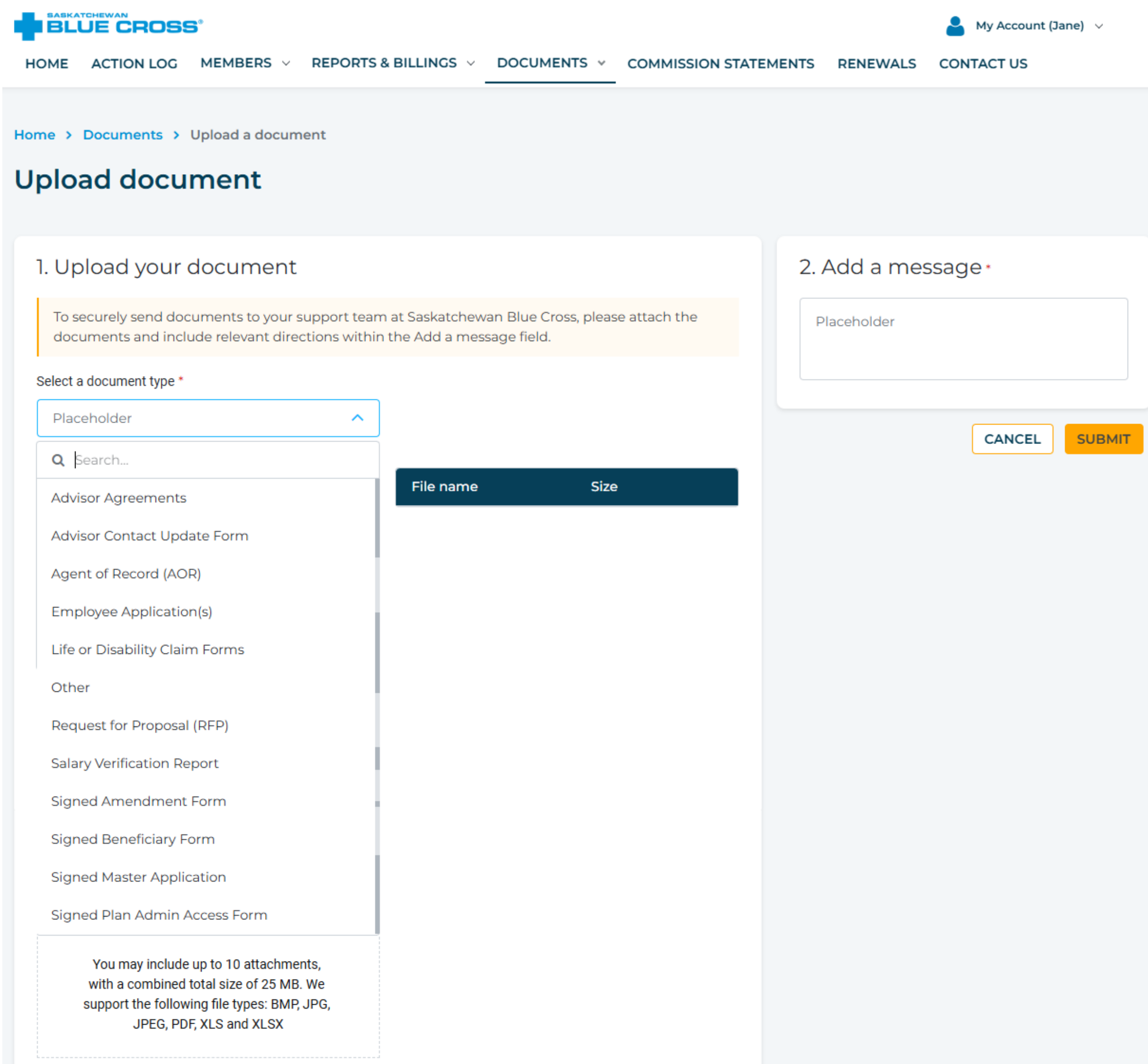
Documents

Find a Document



Upload a Document

This secure document sharing feature allows Advisor users to easily and safely exchange documentation directly through the Advisor Portal. Advisor users can upload, receive and manage documents with Saskatchewan Blue Cross.



Contact Us

Thank you for continuing to entrust us with your business! If you have any questions, please reach out to your Account Executive.

Empowering *healthy lives.*

GET IN TOUCH

Our business hours are 8:30 a.m. to 5:00 p.m., M–F.
In-person service hours are 9:00 a.m. to 4:00 p.m., M–F.

SASKATOON

516 2nd Avenue North
Saskatoon, SK
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