Assurity®

Worksite Group Administration
(888) 707-3987 Ext. 4210

Questions regarding billing information (i.e. refunds, premium information, status of cancellation, policy information, etc.)

Director

Bridget Tupa (Ext. 4570)

New Business Supervisor

Julie Book (Ext. 3687)

Billing/Policy Administration Supervisor

Tammy Halliwill (Ext. 3406)

Platinum Services

Shirley Rogge (Ext. 3541)

Shelly Nachtman (Ext. 4362)

Billing Team

Mandy Bordovsky (Ext. 3722)	Paul Mohatt (Ext. 3755)
Karen Burke (Ext. 4406)	Pam Pieschke (Ext. 3694)
Cathi Cotton (Ext. 3492)	Kelly Rausch (Ext. 4571)
Jenny Elasser (Ext. 4308)	Josue Rivera (Ext. 4611)
Greyson Engle (Ext. 4637)	Jennye Rose (Ext. 3480)
Brittany Grove (Ext. 4361)	Amber Smith (Ext. 3524)
Ashley Haas (Ext. 4363)	Trevon Snell (Ext. 3505)
Liz Hoffman (Ext. 4477)	Casey Spilker (Ext. 4600)
Jamie Johnson (Ext. 4526)	Kassidy Wachter (Ext. 4547)
Claire Jorgensen (Ext. 4539)	Jeni Wilkinson (Ext. 4530)
Tammy Lief (Ext. 3455)	Cody Zessin (Ext. 3707)
Spencer Lindholm (Ext. 4373)	

Claims Contact Center
(800) 869-0355 Ext. 4484

Questions regarding claim information or status. To request a claim form, go to www.assurity.com and click on "Customer Center."

Supervisors of Customer Connections

Jon Rouse and Deb Broussard

General Information

Group Set-Up/Billing Process

After the new group applications or data file has been received, a welcome call is made to the newgroup by the Billing Administrator assigned to the group.

Information provided on the "Group Policy Holder Application" is verified by the group contact so that all applications are set up and coded correctly (paymode, refunds, issue date, etc.).

Once the New Business Team or Business Transformation has completed the coding or data feed process and the policies are all active, the first bill is sent.

- The Billing Administrator for the group will send a followup email to the group asking if they have any additional questions about the billing process and clarify some of our processes.
- The Billing Administrator will monitor the group until they feel it is running smoothly and has gotten off to a good start.

After the first initial bill has been sent, bills will generate 8 days prior to the "Statement For" date, and will be due within 20 days (remit payment date).

Online Bill Reconciliation System

Our online bill reconciliation system is a fast and easy way to reconcile your bills and review coverage. You can review and reconcile your bill, update your employee's information and pay your bill online via Check, EFT (Electronic Fund Transfer) or Credit Card.

Communication will be sent to you the Employer via email when bill is ready to be reconciled. Simply click on the link inside the email, enter your unique ID and password and you are ready to reconcile and submit your payment.

Payments

Payments will be posted within 3 days of receipt, providing Assurity has the appropriate reconciliation reports from the Employer or Third Party Administrator.

- Manual Reconciliation – A complete policyholder to policyholder breakdown is required.
- Processed as Billed – Premium received matches premium billed. Applying of premium is instantaneous.

Any discrepancies are researched between the Case Manager and the Employer or Third Party Administrator.

Employer Requirements

Please remit a copy of the billing reciept with your payment. Some employers send personal spreadsheets in place of our electronic bill, and this is accepted as well. Self-Bills are to be sent to Asurity in alphabetical order by last name along with the premium being remitted per employee.

If an employee has terminated employment or is on leave of absence please note in the appropriate field on the electronic bill, paper bill or on your self-bill remitted to a Assurity.

Late Payment Process

60 days past due - A Lapse letter goes out, and if no payment is received within 15 days the plan will terminate. The insured, agent and employer/third party administrator will be notified that premiums have not been received.

Group Maintenance

The Case Manager is required to take care of all post issued service requests for their groups.

- Cancellations
- Address Changes
- Name Changes
- Loan Payment Request
- Reduction in coverage
- Duplicate Policy
- Beneficiary Request
- Refunds
- Automatic Bank Draft Setup
- Reinstatements

Communications to Employees

Employees will receive the following correspondence about their policies from Assurity via mail following the circumstances given. All correspondence will include the appropriate contact information.

Direct Bill	Sent when notified by policyholder, agent or employer than the employee has terminated employment, or when premium is not received from payroll deductions.
Back Premium	Typically used when employee has been on leave of absence and needs to make up premium.
Free Look	The policy was cancelled during its pending process or within the policyowner's right-to-cancel period. In both cases, any and all premiums will be refunded.
Surrender	The policy was cancelled after it was placed in force and after the right-to-cancel period expired. No premium will be refunded unless received after cancellation.
Incomplete	Outstanding requirements prevented a policy from being issued and Assurity was unable to obtain that information through follow-up attempts. The policy will be closed out and all premiums received would be refunded.
Decline	Assurity cannot approve the application, either due to medical history that places the proposed insured outside the limits of acceptance, or criteria that was not met. The application is declined and all premium received will be refunded.
Lapse	The policy was cancelled after the 60-day grace period. No premium will be refunded unless received after the cancellation.

Create Your Profile

Please click on the link in the welcome email to access the Assurity Billing Reconciliation website.
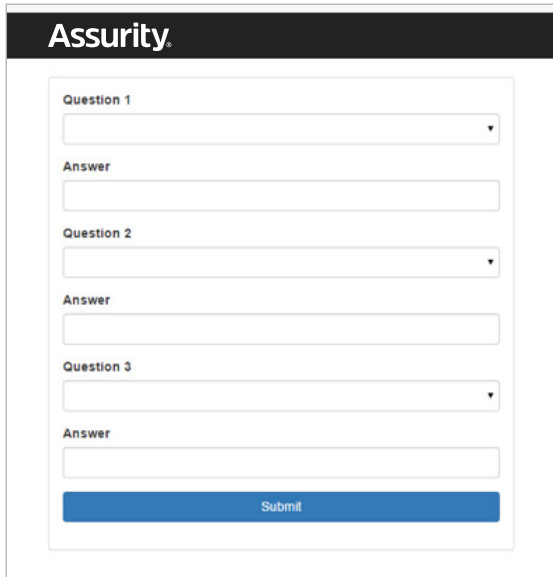
Enter your email address and select "Next." This will be your username.

Create and confirm a unique password. Your password must be at least 8 chracters with at least one capital letter, one lower case letter, one number and one special character. Select "Next" to continue.
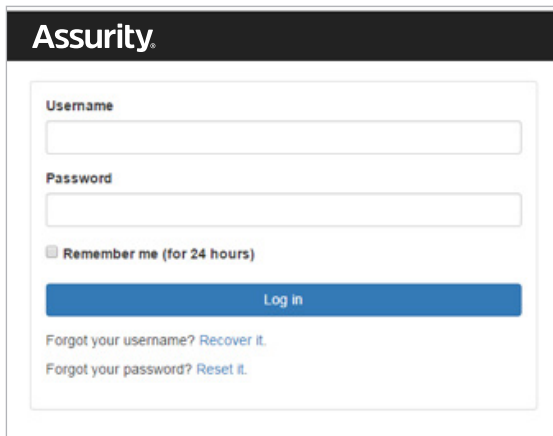
Select your three security questions and provide answers to each. Select "Submit" to save your profile information.

Log in to access your Group Administrator profile.