



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.

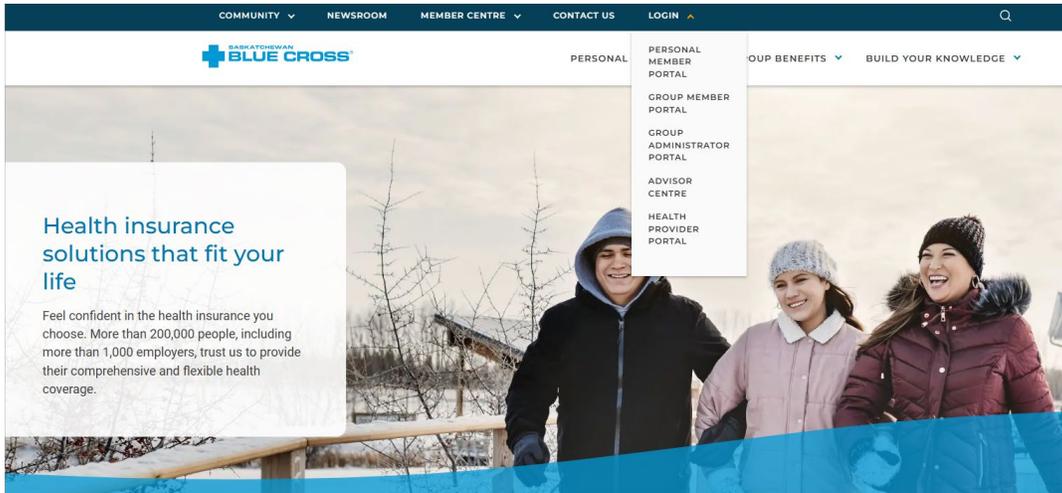
For more than 75 years, Saskatchewan Blue Cross has been recognized as an organization that delivers with people at the heart of every interaction. We believe in a personalized, thoughtful, and highly responsive experience. Each step with us is infused with customized care. With full-service offices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

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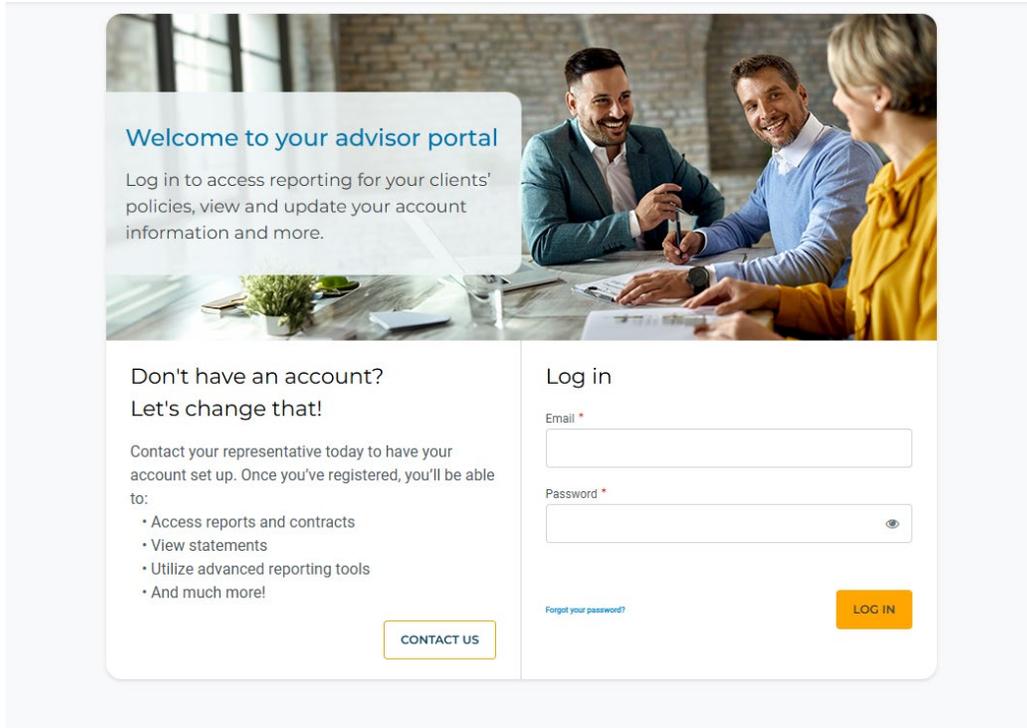
Logging-In

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.

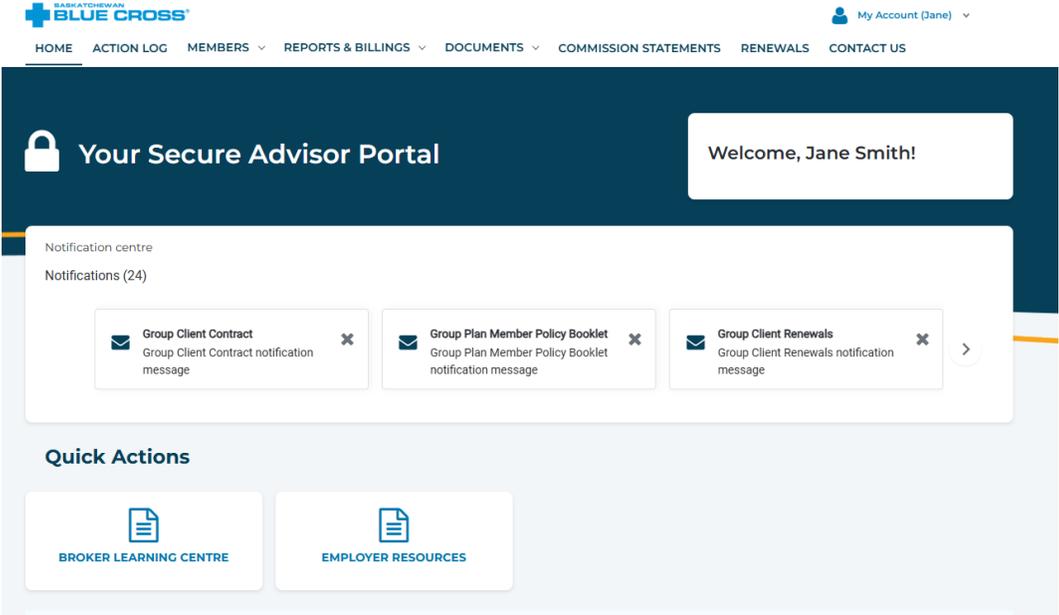
Forgot your Password? Click the Forgot your Password link, enter in your email address and click Change Password. A secure email will be sent with instructions on how to set a new password.



The screenshot shows a web form titled "Manage your account" with the subtitle "Follow the steps below to reset your password". The form is set against a background image of wheat stalks at sunset. It is divided into two columns. The left column is titled "Forgot your password?" and contains the text "Enter your email and we'll send you instructions to change your password." The right column is titled "Enter your email address" and contains an "Email" input field with a red asterisk and a yellow "CHANGE PASSWORD" button.

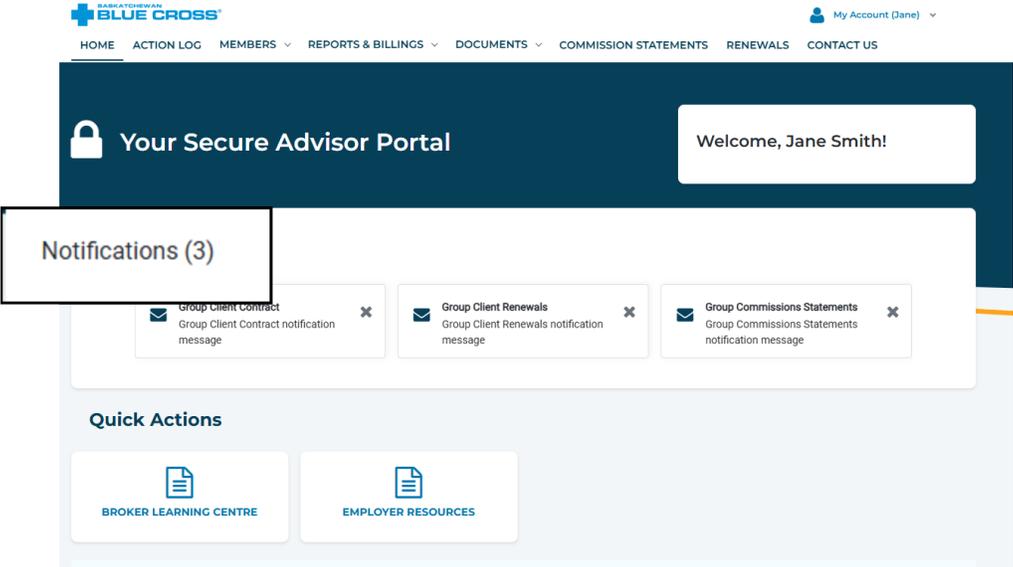
Main Navigation & Landing Page

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.

The screenshot displays the Blue Cross Saskatchewan Advisor Portal. At the top left is the logo for Saskatchewan Blue Cross. The navigation menu includes: HOME, ACTION LOG, MEMBERS, REPORTS & BILLINGS, DOCUMENTS, COMMISSION STATEMENTS, RENEWALS, and CONTACT US. A user profile link 'My Account (Jane)' is visible in the top right. The main header area features a lock icon and the text 'Your Secure Advisor Portal' on the left, and a white box with 'Welcome, Jane Smith!' on the right. Below the header is a 'Notification centre' section with 'Notifications (24)'. It contains three notification cards: 'Group Client Contract' (Group Client Contract notification message), 'Group Plan Member Policy Booklet' (Group Plan Member Policy Booklet notification message), and 'Group Client Renewals' (Group Client Renewals notification message). A 'Quick Actions' box is overlaid on the left side of the notification center. Below the notifications are two quick action buttons: 'BROKER LEARNING CENTRE' and 'EMPLOYER RESOURCES'.

My Account

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

The screenshot displays the 'My Account (Jane)' dropdown menu with options: Home, Update Profile, User Management, and Log out. The main page features the Blue Cross logo, a navigation bar with links like HOME, ACTION LOG, MEMBERS, REPORTS & BILLINGS, DOCUMENTS, and COMMISSION STATEMENTS, and a header 'Your Secure Advisor Portal'. Below this is a 'Notification centre' with three notifications: 'Group Client Contract', 'Group Client Renewals', and 'Group Commissions Statements'. At the bottom, there are 'Quick Actions' for 'BROKER LEARNING CENTRE' and 'EMPLOYER RESOURCES'.

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.

Policy * Division *

Start typing or chose Start typing or chose

ID Number First name Last name

Placeholder Placeholder Placeholder

Include cancelled and future effective dated members

RESET SEARCH

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.

My Account (April) ▾ Français
HOME ACTION LOG MEMBERS ▾ REPORTS & BILLINGS ▾ DOCUMENTS ▾ CONTACT US

[Home](#) > [Members](#) > [Member search](#) > [Update member](#) > [Member detail](#)

Member detail: JULIE GARFIELD

Policy: 57412-0 | ID: 105379

TRANSFER MEMBER TERMINATE MEMBER REQUEST MEMBER CARD

- 1. PLAN MEMBER INFO**
- 2. SALARY & OCCUPATION
- 3. FAMILY MEMBERS
- 4. BENEFITS
- 5. BENEFICIARIES

Plan member information

Group	
Policy	Division
57412	0

Member status detail

Status	Termination / Reinstatement date	Termination reason
ACTIVE		

Member Information

Name	Date of birth	Sex
JULIE GARFIELD	10 Oct 2000	Female
Employee Id	Permanent date employed	
	7 Aug 2024	

UPDATE

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. PREVIEW

Details

Group

Policy * Division

Select policy Select division

Member info

First name * Last name * Date of birth * Sex * ⓘ

Placeholder Placeholder DD/MM/YYYY Start typing or select

Date employed * Application date ⓘ * Employee ID

DD/MM/YYYY DD/MM/YYYY Placeholder

Waive plan waiting period ⓘ

Primary address

Country *

Canada x

Street Address *

Placeholder

City * Province * Postal code *

Placeholder Start typing or select Placeholder

Email Phone number

Placeholder (###) ###-####

Direct Deposit Information

Branch/transit # Bank/institution # Account #

Placeholder Placeholder Placeholder

001 **00002** **003** **4567 890**

Branch/transit **Bank/institution** **Account**

(5 digits) (3 digits) (7-12 digits)

Any additions made on this screen may affect your billing. Please ensure all information submitted is correct.

CANCEL SAVE & EXIT SAVE & CONTINUE

Benefits

Please ensure employee salary and beneficiary information is updated & accurate

Health

Benefit	Waive reason
<input checked="" type="checkbox"/> Class A All Employees Health Age 70 & Over	Select...
<input checked="" type="checkbox"/> Class A All Employees Health under 70	Select...
<input checked="" type="checkbox"/> Class A All Employees Second Opinion	Select...
<input checked="" type="checkbox"/> Class B All Owners Health Age 70 & Over	Select...
<input checked="" type="checkbox"/> Class B All Owners Health Under Age 70	Select...

Dental

Benefit	Waive reason
<input checked="" type="checkbox"/> Class A All Employees Dental	Select...
<input checked="" type="checkbox"/> Class B All Owners Dental	Select...

Life

Benefit	Waive reason	Coverage amount
<input checked="" type="checkbox"/> Class A All Employees AD&D	This benefit cannot be waived	
<input checked="" type="checkbox"/> Class A All Employees CI	This benefit cannot be waived	
<input checked="" type="checkbox"/> Class A All Employees Dependent Life	This benefit cannot be waived	
<input checked="" type="checkbox"/> Class A All Employees Life	This benefit cannot be waived	
<input type="checkbox"/> Class A All Employees Optional Life	This benefit cannot be waived	Coverage amount
<input checked="" type="checkbox"/> Class B All Owners Life	This benefit cannot be waived	

Disability

Benefit	Waive reason	Coverage amount
<input checked="" type="checkbox"/> Class A All Employees LTD	This benefit cannot be waived	
<input checked="" type="checkbox"/> Class A All Employees WI	This benefit cannot be waived	
<input checked="" type="checkbox"/> Class B All Owners LTD	This benefit cannot be waived	
<input checked="" type="checkbox"/> Class B All Owners WI	This benefit cannot be waived	

Spending Account

Benefit	Waive reason
<input checked="" type="checkbox"/> Class A All Employees HSA	Select...
<input checked="" type="checkbox"/> 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



SK

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 ?

+ 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

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 *

Wage * 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.

The screenshot shows the top navigation bar with the Saskatchewan Blue Cross logo on the left and 'My Account (April)' and 'Français' on the right. The main navigation menu includes 'HOME', 'ACTION LOG', 'MEMBERS', 'REPORTS & BILLINGS', 'DOCUMENTS', and 'CONTACT US'. Below the navigation is a breadcrumb trail 'Home > Action log' and a heading 'Action log'. The search form has the following fields: 'Status' with radio buttons for 'In progress', 'Error', 'Completed', and 'All statuses'; 'Action type' with a dropdown menu; 'Policy' with a dropdown menu; 'First name' and 'Last name' with text input fields; 'ID number' with a text input field; 'Date submitted from' and 'Date submitted to' with date pickers. 'RESET' and 'SEARCH' buttons are located at the bottom right of the form.

Advisor users can filter Action Types or search all.

This screenshot shows the same search interface as above, but with the 'Action type' dropdown menu open. The 'Status' section now has checkboxes for 'In progress', 'Error', 'Completed', and 'All statuses', all of which are checked. The 'Action type' dropdown menu lists the following options: 'Add Member', 'Beneficiary', 'Benefits', 'Family Members', 'Health Spending Account', 'Member Information', 'Personal Wellness Account', 'Reinstate Member', 'Request Member Card', 'Salary & Occupation', 'Terminate Member', 'Transfer Member', and 'User Management'. The 'RESET' and 'SEARCH' buttons remain at the bottom right.

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.

The screenshot shows the 'BASKATCHEWAN BLUE CROSS' logo at the top left. The navigation menu includes 'HOME', 'ACTION LOG', 'MEMBERS', 'REPORTS & BILLINGS', 'DOCUMENTS', and 'CONTACT US'. The user is logged in as 'My Account (April)' and the language is set to 'Français'. The breadcrumb trail is 'Home > Reports & billings > Billings'. The main heading is 'Billings'. Below it is a search form with the following fields: 'Policy *' (dropdown menu with 'Select...' option), 'Division *' (dropdown menu with 'Select...' option), 'Coverage Period' section containing 'From *' (text input with 'MM/YYYY' placeholder and a calendar icon) and 'To *' (text input with 'MM/YYYY' placeholder and a calendar icon). There are 'RESET' and 'SEARCH' buttons at the bottom right of the form.

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

The screenshot shows the 'Your Secure Plan Administrator Portal' with a dark blue header. A white box on the right says 'Welcome, April Jones!'. Below the header is a 'Notification centre' section with 'Notifications (1)'. A notification card is displayed with an envelope icon, the text 'Invoice(s)', and 'Invoice(s) notification message' with a close button (X).

Each Bill is available in both CVS and PDF.

The screenshot shows the Saskatchewan Blue Cross website interface. At the top, there is a navigation menu with links for HOME, ACTION LOG, MEMBERS, REPORTS & BILLINGS, DOCUMENTS, and CONTACT US. The user is logged in as 'My Account (April)' and the language is set to 'Français'. The main content area is titled 'Billings' and contains a search filter form. The form has fields for Policy (57412), Division (0 - LOGISTIC OFFICE SPACES - SASKATOON and 1 - LOGISTIC OFFICE SPACES - REGINA), Coverage Period (From: 12/2024, To: 02/2025), and buttons for RESET and SEARCH. Below the search results, there is a table with 2 items. The table has columns for Policy, Division, Start Date, End Date, Amount due, and Bill format. The first row shows Policy 57412, Division 0, Start Date 2024-12-01, End Date 2024-12-31, Amount due \$1,676.04, and Bill format CSV and PDF. The second row shows Policy 57412, Division 1, Start Date 2024-12-01, End Date 2024-12-31, Amount due \$2,217.70, and Bill format CSV and PDF.

The PDF version will contain the following sections:

- Statement of Account

The screenshot shows a Statement of Account for Dec 2024 from Saskatchewan Blue Cross. The header includes the Saskatchewan Blue Cross logo, the title 'LOGISTIC OFFICE SPACES - SASKATOON Statement of Account for Dec 2024', and the issue date 'Jan 07, 2025' and due date 'UPON RECEIPT'. The client information includes Group 57412, Roll Number 0, and Invoice SBC1225912. The client administration representative is listed as 'Group Benefits Service'. The total payable is \$1,676.04. The footer includes the address 'SASKATCHEWAN BLUE CROSS, P.O. BOX 4030 516 2ND AVENUE NORTH, SASKATOON, SK S7K 3T2' and the instruction 'Please write invoice number on cheque'.

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





Group 57412
 Roll Number 0
 Invoice SBC1225912

LOGISTIC OFFICE SPACES - SASKATOON
Statement of Account for Dec 2024

Issue Date Jan 07, 2025
 Due Date UPON RECEIPT

ACCOUNT SUMMARY

Inquiries about your bill?

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

Previous Charges

Previous Amount Billed	\$466.86
Previous Amount Paid	\$0.00
Outstanding Balance	<u>\$466.86</u>

Current Charges

Please retain this page for your records

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**



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



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



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	\$0.00				
				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	\$0.00
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 Numbr	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.

Member & Policy Summary Reports

- WR89 – Member and Dependent Address Listing
- WR118 – Overage Dependent Mailing List
- WR11 – Billing Information by Member
- WR88 – Member Listing with Benefit Details
- WR10 – Certificate Analysis
- WR109 – Enrolment by Plan and Family Status
- WR100 – Division Subdivision and Product Listing
- WR01 – Rates by Policy
- LD89 – Employee Life and Disability Listing

Experience Reports

- WR183 - Utilization by Total Paid
- WR75 – Claims Summary by Plan
- WR77 – Claims by Benefit
- UW511 – Integrated Health Management Analysis
- LD31 – Life and Disability Payment Summary
- UW531 – Summary by Line of Benefit and Claimant Type

Prescription Drug Claim Reports

- WR67 – Health and Dental Income and Claims by Policy
- WR67L – Life Income and Claims by Policy
- WR19 – Drug Transaction Summary
- WR21 – Drug Transactions Paid Percentage of Total
- WR23 – Total Drug Transactions Ingredient Cost and Dispensing Fee
- WR25 – Drug Plan Utilization by Month
- WR27 – Drug Plan Utilization by Quarter
- WR28 – Drug Plan Utilization by Relationship
- WR29 – Therapeutic Classification by Number of Transactions
- WR30 – Therapeutic Classification by Amount Paid
- WR31 – Drugs by Number of Transactions
- WR32 – OTC Drugs by Number of Transactions
- WR35 – OTC Drugs by Amount Paid
- WR34 – Drugs by Amount Paid

Spending Account Reports

- WR36 – Drug Summary by Amount Paid
- WR39 – Biologic Drug Summary by Amount Paid
- WR47 – Drug Plan Utilization – Smoking Cessation
- WR02 – Health Spending Account Credit Summary
- WR12 – Personal Wellness Spending Account Credit Summary

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Policy <input type="text" value="Placeholder"/> ▾	<input type="checkbox"/> Agent of Record (AOR)	<input type="checkbox"/> Group Client Contract(s)	<input type="checkbox"/> Group Commission Statement(s)
	<input type="checkbox"/> Employee Application(s)	<input type="checkbox"/> Invoice Calendar	<input type="checkbox"/> Life or Disability Claim Forms
	<input type="checkbox"/> Group Client Renewal	<input type="checkbox"/> Invoice(s)	<input type="checkbox"/> Report(s)
	<input type="checkbox"/> Group Plan Member Policy Booklet	<input type="checkbox"/> Other (Member)	<input type="checkbox"/> Salary Verification Report
	<input type="checkbox"/> Request for Proposal (RFP)	<input type="checkbox"/> Signed Amendment Form	<input type="checkbox"/> Signed Beneficiary Form
	<input type="checkbox"/> Signed Master Application	<input type="checkbox"/> Signed Plan Admin Access Form	

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