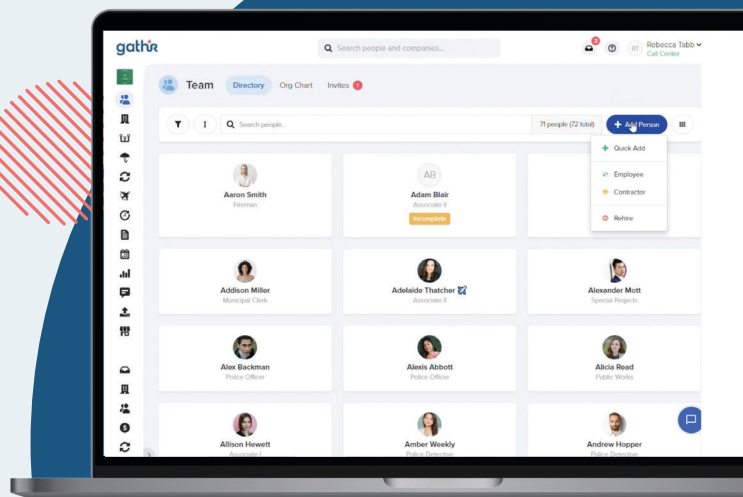


QuickStart guide for full-access admins



Gathr takes the hassle out of benefits enrollment and administration by making it easy for you to complete common tasks. Use the steps below to get started.



Adding employees

1. From the Benefit Dashboard, select **+Add Person** under the Team tile.
2. Enter the employee's name and email address, then select **Start Hiring**.
3. Complete the remaining fields. Select continue for any areas that are not applicable.

With the onboarding link, invite the new team member to complete I-9 or W-4 paperwork as appropriate.

If you're adding an employee for benefits administration purposes, select **Quick Add**. Otherwise, select the appropriate option.



Terminating employees

1. From the Benefit Dashboard, select **Terminate** under the Team tile.
2. Select the team member to be terminated.
3. Select **Start Termination**.
4. Complete the remaining fields. Select continue for any areas that are not applicable.



Pulling standard reports

1. From the Benefit Dashboard, select **Benefit Deduction Report** under the Resources tile.
3. Enter details and select filters as needed. For benefits-related reports, ensure the **As Of Date** field is the coverage effective date, generally the first day of the next month.
4. Once complete, select **Generate Report**. Once the report is generated, select **Download**.



Adding/changing a payment method

1. From the Benefits Dashboard click **View All** under Gathr Billing*.
2. Under Payment Methods, select **+ Add Payment Method**.
3. Enter in payment information in the fields provided. To turn on autopay, toggle on the Autopay button and accept the terms and conditions. **Please note: Gathr only accepts ACH payments.**
4. Select **Add Bank Account**.

Bills are generated on the 5th of the month. If autopay is not turned on, you will need to manually pay your bill on the 19th of the month. If Autopay is toggled on, payment is taken on the 20th of the month.



Viewing and paying your bill

1. From the **Billing** page, scroll to the invoices section and select **View** next to the invoice.
2. Your bill is divided into sections by product. Expand each section to view premium amounts by employee. **Added**, **removed** or **changed** employees are indicated, so you can quickly see how onboarded and offboarded employees impact your bill. **Adjustments** appear at the end of each product item outlining catch-up credits or charges for changes affecting already paid bills. Should you find a discrepancy, click the headset in the top right corner for support.
3. If you don't have autopay turned on, select **Pay Invoice** to pay the bill using the payment method saved in Gathr. If you don't have a payment method saved in Gathr, you will be prompted to input it.



Saving or printing your bill

1. From the **Billing** page, scroll to the invoices section and select **View** next to the invoice.
2. Expand any sections you want printed or saved. The bill will print or save exactly as it appears on the screen.
3. Select the **Download** icon located at the top right of the screen.
4. A popup will appear where you can either save or print your bill. To download the bill, select **Save As PDF** then **Save** or it can be downloaded as an **XLSX** file. To print the bill, select the printer, then select **print**.



Impact of terminations and cancellations

Terminations

Employees and their insurance are automatically removed from the bill when employees are terminated in Gathr. Accounts Services will reach out to terminated employees to see if the terminated employee wants to continue or cancel coverage. Note – if termination has occurred after the invoice is generated, you will need to regenerate the bill to show the update in coverage. If the bill is paid as is, a credit will appear on the next invoice.

Cancellations

If you have Full Access Admin rights, you will be able to cancel employee coverage in Gathr. To do so:

- Expand the left-hand menu, select **Team**, then select the employee.
- Select **Benefits**.
- Under the Active Benefits tab, select the three dots next to the benefit to cancel, select **Cancel Coverage** then follow the workflow to process the cancellation.
Note: all coverage for that benefit will be cancelled.

To cancel one policy in a benefit line, have the employee fill out the [Request for Service Form](#) and email the form to service@coloniallife.com, or fax it to the number on the form. Coverage will automatically be removed on the next month's bill.

* Not all companies are eligible for Gathr Billing. Reach out to your representative to learn how to pay your bill.