

Trustmark Group Insurance

Understanding Your Group Administrator Menu Options

Please follow these simple steps to access Express to view or make changes to your employees' insurance records. Once you have registered, online help screens and a complete printable User Guide are available to assist you.

Log on to Express

1. Log on to Express at enroll.trustmarklife.com. No prefix is necessary (e.g. www. or http:)
2. Enter your assigned User ID. This is usually your group ID and your initials and will not change
3. Enter your assigned password. This is a system-generated password and must be entered exactly as shown
4. Select Login. The system will complete the initial login and take you to the second page to enter a password of your own choosing. This is a required step:
 - ✓ Enter your assigned User ID on the first line
 - ✓ Re-enter your assigned password on the second line
 - ✓ Enter a password of your own choosing on the third line. This may be alpha/numeric from 6-32 characters long
 - ✓ Re-enter your newly created password on the fourth line
 - ✓ Select Submit
5. The system will change your password and display a confirmation message. Select Continue
6. At the Logon Screen enter your User ID and newly created password to log in to Express
7. Read and accept the eBusiness Agreement. You will now be taken to your main menu screen.

Individual Member Administration Section

To make changes to an individual employee's insurance record, enter the employee's Member ID / SSN in the field provided and select one of the following options:

Member Menu – This option allows you to make changes to an individual employee's insurance record. From here, you may enroll or terminate dependents, change personal or dependent information, and add or reduce coverage. The menu options you will see are:

- [Maintain Member Personal Data](#) – Click here to change your employee's name, address, phone number, gender, other insurance information, or smoker status.
- [Maintain Dependent Personal Data](#) – If your employee is covering dependents, you have the ability to change an existing dependent's information plus update student status and incapacitated dependent status.
- [Maintain Beneficiaries](#) – If you offer life-type benefits, select this link to view or change an employee's beneficiary designations.
- [Enroll in Benefits](#) – This option allows you to add a spouse or dependent child to your employee's insurance plan, or elect a coverage that was previously waived.
- [Terminate Dependents](#) – Choose this link to remove a dependent from all benefits.
- [Reduce Coverage](#) – Click here to waive a specific benefit for an employee and/or dependent.
- [View Transaction History](#) – View your employee's eligibility and benefit selection changes entered through the Express system for a rolling 12-month period.
- [View Status of Held Transaction](#) – View the status of a transaction that was held for review.
- [Update Held Transactions](#) – Act upon transactions that are being held for your review or additional information from your employee.
- [View Current Benefit Selections](#) – View your employee's current benefit elections and who is covered.
- [ID Card Request](#) – Click here to order additional ID cards for your employee.

Add Member – Click here to add an employee to your insurance plan. Once you enter the key employee information in the fields provided, you may save the data or continue with the enrollment. Be sure to click Accept at the end of the enrollment process to submit the information to Trustmark Life Insurance Co.

IMPORTANT: If you are rehiring an employee who was previously on our insurance plan, please use the Reinstatement Member menu option.

Update Member – Access this option to change an employee's key information such as salary updates, changes in locations or member groups (classes of benefits). Enter an event date (date of change) and update the necessary fields. Click Accept at the bottom of the screen to ensure your changes have been applied to your employee's record.

Terminate Member – Select the Terminate Member link when an employee is no longer eligible for coverage. Simply enter your employee's actual termination date (for example, the last day worked) and select a termination reason from the drop-down box. Be sure to click Terminate Member at the bottom of the screen to complete the transaction.

Reinstatement Member – If an employee has previously been terminated and has returned to work, it is necessary to reinstate the employee into the insurance plan. Click the Reinstatement Member menu option, enter the date the employee returned to work, and select a reinstatement reason from the drop-down box. Click on Reinstatement Member when completed and you will receive a confirmation page indicating your transaction has been accepted.

Request Member SSN Change – Click here if you find it necessary to change a member's social security number due to an error. Enter the correct social security number in the field provided and click on the Request Member SSN Change button. You will be notified when your employee has access to Express using the correct SSN.

ID Card Request – Access this option to request a new ID card for a member. The card(s) will be mailed to your employee as soon as they are printed.

COBRA/Continuation Administration

Enter a terminated employee's Member ID / SSN in the field provided and select one of the following menu options:

Move Member to COBRA/Continuation – If a terminated member elects COBRA or State Continuation, select the Move a Member to Continuation link. Enter the requested information in the fields provided and click the Move Member to Continuation link at the bottom of the screen.

Move Dependent(s) to COBRA/Continuation – If an ineligible dependent elects to continue coverage, enter the employee's Member ID / SSN in the field provided and select Move a Dependent to Continuation. Additional information is requested on a dependent electing continuation in order to ensure proper billing and claims payment. Enter the requested information and click Move Dependent to Continuation at the bottom of the screen to complete the transaction.

Extension of COBRA Due to Social Security Disability (SSD) Award – Select this menu option when an existing COBRA participant elects to extend their COBRA coverage by the additional 11-months that is available due to Social Security Disability.

Update COBRA/Continuation Member Group – Click here to move a COBRA participant to a different member group (class of benefits).

Termination of COBRA/Continuation Participation – Select this link to terminate coverage for a COBRA participant.

Census Administration Section

Initial Group Installation – During your initial group enrollment period you may change an employee's basic census data or add new employees by selecting the Census Data menu link or the Add Member link. If using the Census Data link, please select the Member Menu option if you want to complete your employee's enrollment.

Ongoing Maintenance – When your initial enrollment period is completed, the Census Data menu option offers a view only overview of your employees' data. All changes, updates, additions, and terminations to your employees are to be completed using the Individual Member Administration menu options listed above.

Group Administration Section

The menu options in the Group Administration section offer you the ability to view a history of your employee's transactions, act upon held transactions, view your billing and payment history and request a sample bill. Click on any of the following options to monitor your group's transactions:

View Transaction History – The View Transaction History option allows you to view all of the eligibility and maintenance transactions entered for your group. By default, the display shows all transactions for your group for the last 12-month period. You may sort the display by location or by specific Member ID or social security number.

View Status of Held Transactions – This option allows you to view a history of transactions that previously required your review, your employee's review, and/or approval by Trustmark. Simply click here to access the current status or final determination of your employee's request for benefits or eligibility determination that required additional information. Be sure to advise your employees that all requested information must be submitted to Trustmark prior to a determination being made.

Update Pended Transactions – Transactions requiring your review or your employee's review may be acted upon by clicking the Update Held Transactions link. Use the display to follow up with your employee to ensure all requested information is submitted in a timely manner. When the information has been submitted and/or your review of the transaction complete, click Update at the bottom of the screen. The transactions are removed from this section and now viewable on the View Status of Held Transactions menu option. Please be sure to check your pended items often, as Trustmark cannot act until your review is complete. Refer to your Group Administrator User Guide for additional information.

View Billing & Payment History – Click the View Billing & Payment History link for a recap of your most current billing statements, billed amounts, payment amounts and check numbers. If you should have questions regarding your bills, please feel free to contact your Group Premium Customer Service Representative.

Request Sample Bill – The Request Sample Bill link allows you to order a sample bill that will be emailed to you the next business day morning. Please remember that your regular billing statement will be generated on your usual billing date and this is the statement that is submitted with your payment.

Reports Section

Several reports are available to help you maintain your insurance records:

Member Benefit Elections – View a report that displays a list of your employees and their elected benefits. This option allows you to keep track of and maintain your eligibility records at a glance.

Member's Dependent Enrollment – This option allows you to view a list of your employees' dependents. Similar to the Member Benefit Elections report, this report also lists basic employee information including dependent names and relationships.

Dependent Limiting Age – Access this report to generate a list of your employees' dependents that will soon be reaching your contract's limiting age and will no longer be eligible for coverage.

Resource Center Section

Health tips, physician information, claim forms, administration forms and FAQ's are available at your fingertips through the links located in the Resource Center.

Contact Us

If you have questions about the Express enrollment process, please contact us by:

- Clicking on the Contact Us link at the top of any Express screen
- Calling toll free at 866-213-9829 Monday through Friday between 7:30 a.m. and 5:00 p.m. Central Time
- Sending an email to Express@trustmarklife.com

IMPORTANT

If you were unable to use Express for your group's initial enrollment, specific enrollment data including other insurance information, marital status, student status and beneficiary information is not available in Express. You will be requested to update this information when accessing an employee's record using the Member Menu screen.