Enrollments
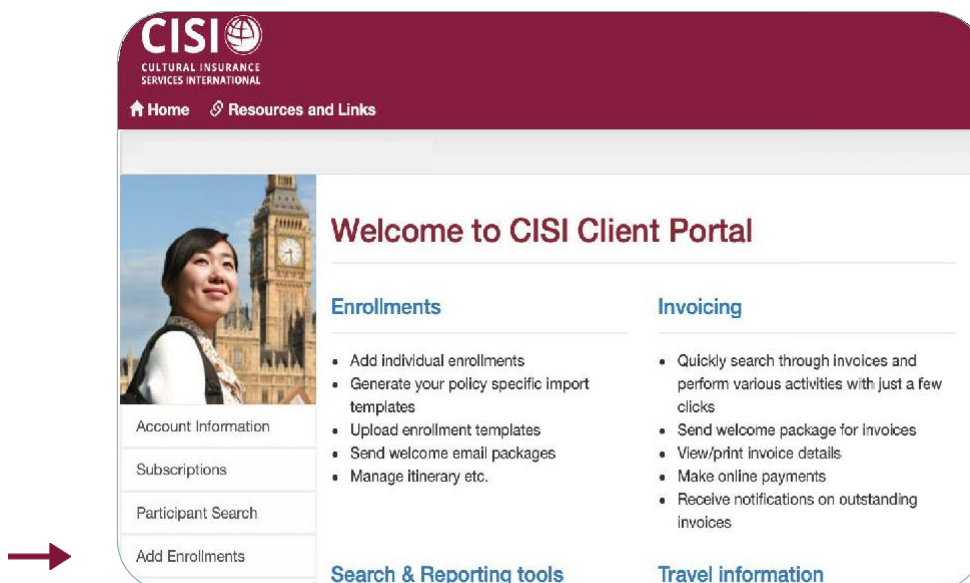
Enrolling Participants

Enrolling NEW Participants

Step 1: Click on **Add Enrollments**.

You can enroll your NEW participants using one of the following methods:

a) **Upload the CISI Import Template** (typically used for groups)

   OR

b) **Manually Add Individuals** (used for one-off enrollments)

Utilize the CISI Import Template

1. Select **GENERATE TEMPLATE.**

2. Complete Template and save.

    All yellow columns must be completed in order to successfully upload the enrollment template.*(For additional instructions on how to complete the template, click here)*

> **HELPFUL HINT:**
> Save the completed template so you can access it again. If a group cancels, you can then use the saved spreadsheet to cancel or change coverage dates (so you won't have to complete the form again).

3. Once you have the template completed, Click on **CREATE INVOICE**.

4. Click on **IMPORT ENROLLMENTS** to upload the enrollments.

*If errors are generated, please double check to make sure the template was completed correctly. See page click here to verify if you completed the template correctly. If you need assistance, please email enrollments@mycisi.com or call Kathleen Connors at 203-399-5509.

5. Once uploaded, and no errors occurred, click on **CLOSE INVOICE**.

6. Prompts you to a **PAY NOW OR LATER** screen – **select which one**.

Note: You can also pay later by credit card.

*If you are submitting payment by check, please use the address on the **bottom** of the **Invoice Cover Letter**.*

7. **If you click pay later:** Click **OK** when this box pops up.

8. Prompted to send Welcome Package screen. Click on **Send Welcome Package**.

Send Welcome Package Email

This will come from enrollments email address (enrollments@culturalinsurance.com) and the subject line will be '**CISI Insurance Materials**'.

This contains the following:

- Participant ID Card
- Consulate Letter
- Brochure
- Claim Form
- How-to create a myCISI log in and link to our CISI Traveler App

You can download, print, and/or send the invoice, ID cards, and consulate letters.

9. This screen will appear. Click on **Send Emails**.

This field allows you to edit the email address before sending the welcome package, or if you forgot to put in the email address, you can add one.

Receive an email with an excel spreadsheet to see if the email(s) went through successfully.

Copy yourself or others on the welcome emails being sent to participants. You or the person you put will receive each welcome email.

Click on Send Emails to complete the Send Welcome Package process.

How-to Complete the Import Template

(if you received any errors, please check for the following)

NOTE: All fields in yellow MUST be completed. Do not change the top row. The column titles are how our system reads the information you put in. Changing the names or leaving yellow columns blank will cause errors upon upload.

1. **SPONSOR_CODE** (MANDATORY FIELD)

   If not already populated, please enter in your Sponsor Code (this will be the Sponsor ID you used to log into the Client Portal.)
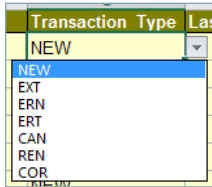
2. **POLICY_NUMBER** (MANDATORY FIELD)

   Please make sure the policy number is correct. The *Coverage Start Date* **must be within the effective dates.**
   Note: Make sure the Policy Number has the right year if you are using a template you already saved on your computer.
   To verify a Policy Number, you can go to **Add Enrollments** screen and see the coverage dates for each policy number.
   (*Examples:* **21** STB… or **21** GLM N… or **21** CC… **21** US…)

3. **TRANSACTION_TYPE** (MANDATORY FIELD)

   If not already populated, please select NEW for new enrollees

4. **GENDER** (MANDATORY FIELD)

    Use F, M, U **not** Female, Male, Unknown, *nor* m, f, u (has to be capitalized)

5. **BIRTH_DATE** (MANDATORY FIELD)

   Please make sure that the correct birthdate is provided. (mm/dd/yyyy)

6. **START_DATE** (MANDATORY FIELD)

   When the participant's coverage Begins (mm/dd/yyyy)
   *Note: The Coverage **Start** Date must be within the effective dates of the corresponding policy number.*
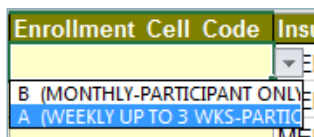
7. **END_DATE** (MANDATORY FIELD)

   When the participant's coverage Ends (mm/dd/yyyy)
   *Note: The Coverage **End** Date cannot exceed 12 months from the Coverage Start Date.*

8. **ENROLLMENT_CELL_CODE** (MANDATORY FIELD)

   Select the rate that applies. *(Do **NOT** leave Enrollment Cell Code Blank – This calculates the cost)*
   Example:

9. **INSURANCE_TYPE** (MANDATORY FIELD)

Select from dropdown if MED is not already pre-filled in.

10. **COUNTRY_OF_ORIGIN** (MANDATORY FIELD)

2-letter Country Codes, or the Country Name written out
Example: Use **US** or **United States** <u>not</u> USA
You can type in the 2-letter code, write the Country Name, or select from the dropdown.

11. **COUNTRY_OF_DESTINATION** (MANDATORY FIELD)

2-letter Country Codes, or the Country Name written out
Example: Use **US** or **United States** <u>not</u> USA
You can type in the 2-letter code, write the Country Name, or select from the dropdown.

> **HELPFUL HINT:**
> **COUNTRY OF ORIGIN &**
> **COUNTRY OF DESTINATION**
>
> *Sheet 2 has the Country Names and two-letter Country Codes for your reference.*

<u>**TRAVELING TO MULTIPLE CITIES AND/OR COUNTRIES:**</u> List in City of Destination using a comma in between.

<u>**WHAT TO PUT FOR COUNTRY OF DESTINATION IF PARTICIPANTS ARE TRAVELING TO MORE THAN ONE COUNTRY:**</u>

Put the place the participant first travels to,is going to be spending the most time in, or needs a visa for.

*ITINERARY FEATURE: Please have participants traveling to multiple countries download the CISI Traveler App OR Create a myCISI login via the Participant Portal on a computer and have them complete the **Itinerary** section. If there is civil unrest, a security evacuation is triggered, or a natural disaster occurs, they will appear on the roster we pull for that country.*

12. **SPONSOR_PROG_NAME** *(OPTIONAL FIELD)*

<u>*Optional Field*</u> *– This is not required by CISI, however this is beneficial to include if you have a specific program name. When you do a Participant Search, you can search by the Sponsor Program Name to pull up participants.*

13. **SPONSOR_PARTIC_ID** *(OPTIONAL FIELD)*

<u>*Optional Field*</u> *- This is not required by CISI, however this is helpful if you need to search for a participant later on and you have your own ID number you want to search by.*

14. **EMAIL_ADDRESS** (MANDATORY FIELD)

(IF YOU DECIDE NOT TO INCLUDE THE EMAIL ADDRESSES, WE WILL NOT BE ABLE TO CONTACT OR SEND THE PARTICIPANT HIS/HER/THEIR INSURANCE INFORMATION VIA THE WELCOME PACKAGE EMAIL)

Note: Make sure there are no typos with @, a period (.), and no additional characters are included, such as ';' – this will generate an error and/or the participant will not receive their necessary insurance materials if it is not corrected before sending the welcome emails.

If you do not want to have the participants e-mail addresses listed, please put your own.

15. **PHONE NUMBER** *(OPTIONAL FIELD)*

This is in case we need to contact the participant.

16. **PRIVACY_CONSENT** (DO NOT DELETE)

Leave this column as-is. It is on the template because you are uploading personal information.

17. **PRIVACY_CONSENT_LINK** (DO NOT DELETE)

Leave this column as-is. It is on the template because you are uploading personal information.

18. **SEC_EMAIL_ADDRESS** *(OPTIONAL FIELD)*

If a participant has a second email address you want to include, or there is a team member that wants to also receive the welcome email, you can include it in this column.

Manually Enter Enrollments

1. Select **+CREATE INVOICE**.

2. Click on **+ADD INDIVIDUAL ENROLLMENT** to upload the enrollments.

3. Enter in all fields that have * and click on **+ADD ENROLLMENT**.

4. Once uploaded, and no errors occurred, click on **CLOSE INVOICE**.

   Note: _If you are enrolling more than one person, click on_ **+ADD ENROLLMENTS** _again until you_ _added all participants you wish to enroll, then_ **CLOSE INVOICE**.

5. Prompts you to a **PAY NOW OR LATER** screen – **select which one**.

   Note: _You can also pay later by credit card._

   If you are submitting payment by check, please use the address on the **bottom** _of the_ **_Invoice Cover Letter_**.

6. **If you click pay later:** Click **OK** when this box pops up.

7. Prompted to send Welcome Package screen. Click on **Send Welcome Package**.

Send Welcome Package Email

This will come from enrollments email address (enrollments@culturalinsurance.com) and the subject line will be '**CISI Insurance Materials**'.

This contains the following:

- Participant ID Card
- Consulate Letter
- Brochure
- Claim Form
- How-to create a myCISI log in and link to our CISI Traveler App

You can download, print, and/or send the invoice, ID cards, and consulate letters.

8. This screen will appear. Click on **Send Emails**.

This field allows you to edit the email address before sending the welcome package, or if you forgot to put in the email address, you can add one.
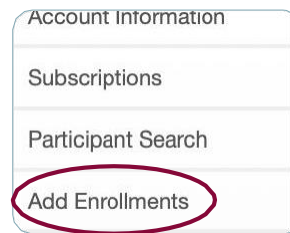
Receive an email with an excel spreadsheet to see if the email(s) went through successfully.

Copy yourself or others on the welcome emails being sent to participants. You or the person you put will receive each welcome email.
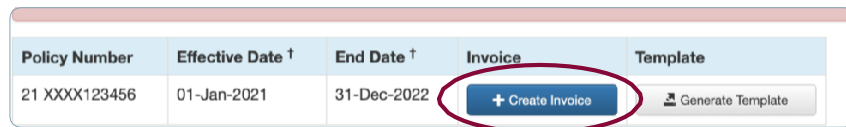
Click on Send Emails to complete the Send Welcome Package process.

Date Corrections

1. Got to **Add Enrollments** on the Home Screen, left sidebar.

   Account Information

   Subscriptions

   Participant Search

   Add Enrollments

2. Click on **Create Invoice.**

Policy Number	Effective Date †	End Date †	Invoice	Template
21 XXXX123456	01-Jan-2021	31-Dec-2022	+ Create Invoice	⤓ Generate Template

3. Click on **Change Existing Enrollments.**

   PO Number [ ] 💾 Save   🗑 Delete Invoice
   Please note: This field is optional. You can put in a PO number if you need it for your billing purposes, or you can put the program name or destination if it is helpful for you, or you can leave it blank. Once you create a PO number it cannot be modified.

   Enrollments 0   ✎ Change Existing Enrollments ➕ Add Individual Enrollment ⤓ Import Enrollments ⤓ Generate Template
   Enrollments do not exist for this invoice. Please add or import enrollments.

4. You can search for a participant by any of the following fields: First Name, Last Name, Gender, Date of Birth, Participant ID, Sponsor ID and/or Email Address. Not all fields need to be completed. Once you've entered in your preferred search field(s), click on **Search**.

   Change Enrollments   ×

   Search Participants

   First name   Last name
   [john]   [johnson]
   Gender   Date of birth mm/dd/yyyy
   [▴▾]   [   ]
   Participant Id   Sponsor Partic id
   [▴▾]   [   ]
   Email
   [   ]

   ↻ Reset Form   🔍 Search

   Example:
   Searching by First and Last Name: 'John Johnson'

5. Click on the ☰ next to the enrollment you want to edit.

Name	Partic Id	Dob	Gender	Email	Start Date	End Date	INS	Org/Dest	
JOHN JOHNSON	2548175	29-Feb-1984	M	¡EXAMPLE@EX.EDU	14-Jun-2021	01-Jan-2022	MED	US /IT	☰

🔍 Search Again

6. Click on **Change Enrollment Dates**.

Name	Partic Id	Dob	Gender	Email	Start Date	End Date	INS	Org/Dest	
JOHN JOHNSON	2548175	29-Feb-1984	M	EXAMPLE@EX.EDU	14-Jun-2021	01-Jan-2022	MED	US /IT	☰

Change Demographics
Change Enrollment Dates

7. Enter in new Coverage Dates in the **New Effective Date** and **New End Date**. Then click **Save Changes**.

Change Enrollments

Change Enrollment Date

Current Effective Date
06/14/2021

Current End Date
01/01/2022

New Effective Date
09/21/2021

New End Date
01/21/2022

◀◀ Go Back to Results   ⬇ Save Changes

8. When the **Save Changes?** Box appears, click **OK** if you want to finalize the date change. *If you entered in the wrong date, click **Cancel** to go back.*

Change Enrollment Date

Current Effective Date
06/14/2021

Current End Date
01/01/2022

New Effective Date
09/21/2021

Save Changes?

Cancel   OK

◀◀ Go Back to Results   ⬇ Save Changes

9. If you have another participant whose dates need to be adjusted, you can click on **Changing Existing Enrollments** and follow the same steps. Once you are done making the date corrections, proceed to Close the invoice like you would when enrolling NEW participants.

Cancellations

If a participant is no longer partaking in a program, you can cancel their coverage through the Client Portal.

Please note: *This only works if you are canceling someone's coverage whose program has not started yet. If the start date is in the past, please email* enrollmets@mycisi.com *requesting to cancel the person's coverage and state that the person never left their Home Country to partake in the program. We will need the person's name, birthdate and/or CISI Participant ID.*

Two ways to cancel coverage:
- **Group Cancellations** (When a whole program cancels, or if you have a large group)
- **Individual Cancellations** (typically used for one person, or if you have a few)

CANCELLING ONE OR A FEW PARTICIPANTS

To Cancel a participant's coverage whose program has not started yet, follow these instructions:

1. Got to **Add Enrollments** on the Home Screen.

2. Click on **Create Invoice.**

3. Click on **Change Existing Enrollments.**

4. You can search for a participant by any of the following fields: First Name, Last Name, Gender, Date of Birth, Participant ID, Sponsor ID and/or Email Address. Not all fields need to be completed. Once you've entered in your preferred search field(s), click on **Search**.

Example:
Searching by First and Last Name: 'John Johnson'

5. Click on the ☰ next to the enrollment you want to edit.

6. Select **Cancel Enrollment**.

7. Select **OK** to cancel the coverage.

8. If you need to cancel another participant's coverage, follow the same steps. Once done, Close the invoice.

IMPORTANT: After closing the invoice: If you need CISI to initiate a refund via credit card, ACH, or check because the initial enrollment has already been paid, please email **enrollments@mycisi.com** with the cancellation invoice and how you would like it to be refunded. See next page for additional information.

Cancellations and Date Corrections Resulting in a Negative Balance

Unused premium will be refunded. Please inform CISI your preferred methods below.

Please indicate if you would like us to do one of the following:

IF THE INITIAL INVOICE _HAS BEEN_ PAID –
a) Refund back onto Credit Card (if the Credit Card was the payment method);
b) Refund via Check;
c) Refund via ACH/Wire

   OR
d) Keep the Credit on file to apply to a Future/Another Invoice *(when you want to apply the credit, please email enrollments and provide the credit invoice number and the invoice you would like us to apply it to)*

IF THE INITIAL INVOICE _HAS NOT BEEN_ PAID –
a) Apply the Credit to the Initial Invoice, and send an Updated Invoice;

   OR
b) Keep the Credit on file to apply to a Future/Another Invoice *(when you want to apply the credit, please email enrollments and provide the credit invoice number and the invoice you would like us to apply it to)*

Edit Participant Demographics

Through the Client Portal you can change the following:

- Birthdate
- Country of Origin
- Destination Country
- Sponsor Program
- Sponsor Program ID
- Gender
- Email Address

IMPORTANT: Name Changes need to be submitted to enrollments@mycisi.com. When emailing please provide the incorrect spelling so we can locate the person in the system, and what the correct spelling is.

1. Got to **Add Enrollments** on the Home Screen.

2. Click on **Create Invoice.**

3. Click on **Change Existing Enrollments.**

4. You can search for a participant by any of the following fields: First Name, Last Name, Gender, Date of Birth, Participant ID, Sponsor ID and/or Email Address. Not all fields need to be completed. Once you've entered in your preferred search field(s), click on **Search**.

Example:
Searching by First and Last Name: 'John Johnson'

5. Click on the ☰ next to the enrollment you want to edit.

6. Select **Change Demographics**.

7. Edit whichever fields need to be changed and click **Save Changes**.

8. After saving the changes, you can either go to the **Home Screen** *or* click on **Delete Invoice** *(Delete Invoice does not undo the change you did to the participant's Demographics).* The Demographics do not change the rate so there is no invoice to process. Once you have saved the changes, you can go to **Participant Search** to confirm you've made your updates.

Example: John Johnson was originally going to Italy, and now going to France.
Under his enrollment, you will see his Destination Country has changed to **FR**

	Last Name ↑	First Name	Participant Id	Dob	Gender	Email	Start Date	End Date	Origin Country	Dest. Country
☐	JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	06/14/21	01/01/22	US	IT
☐	JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	06/14/21	01/01/22	US	IT
☐	JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	09/21/21	01/21/22	US	FR
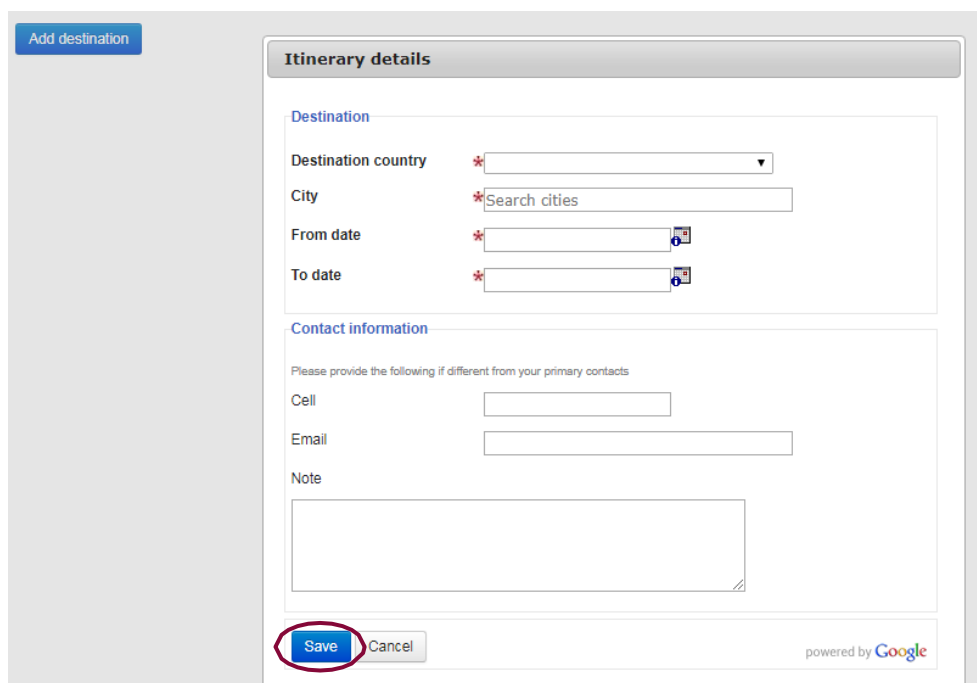
Search Participants

✉ Print | View | Email reports

Grey font is for old enrollments and cancelled enrollmentts. The black font is the participant's correct coverage.

View, Add and/or Manage Itinerary for a Participant

For participant's traveling abroad on a multi-destination program or just taking off to another destination for the weekend, CISI can more accurately pinpoint the location of your participants during emergencies when the **Itinerary** section is completed. Participants can do this on their own via the CISI Traveler App and/or myCISI Participant Portal, however you have the ability to do it as well through the Client Portal.

To view, add and/or manage a participant's itinerary:

1. Go to **Participant Search** on the Home Screen, left sidebar.
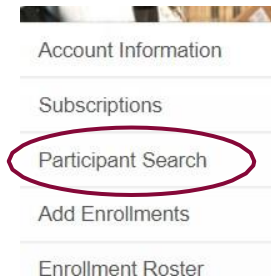
2. Enter in Participant's Name or preferred parameters and click on **Search**.

3. Click on **Participant ID**.

4. A box will pop up - Click on **Manage Itinerary**.

5. From there you can add the participant's itinerary destination(s) and dates within their coverage dates, and click on **Save**. *All* *** *must be completed. Repeat until all the destinations you wish to add are entered in.*

   IMPORTANT: *This feature is for the itinerary within the participant's coverage start date and end date. This does not extend their coverage. If you need to have the participant's coverage dates adjusted, please see the* Date Changes *section (Page 1-3) of this guide.*

6. **After** clicking Save, you will see the participant's itinerary information:

   From here, as mentioned above, you can add more destinations by clicking on **Add Destination**. You can also **Delete** if the participant's itinerary changes.