

# Enrollments

## Enrolling Participants

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## Enrolling NEW Participants

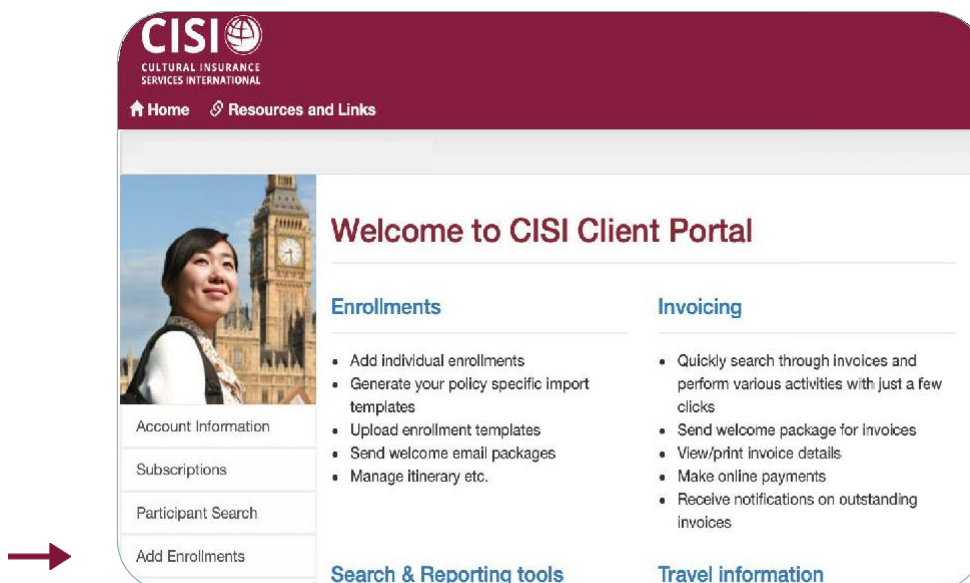
**Step 1:** Click on **Add Enrollments**.

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**.

**CISI**  
CULTURAL INSURANCE  
SERVICES INTERNATIONAL

Home Participant Search Closed Invoice Search

In an effort to improve our response time during a security crisis and enable us to immediately identify any affected students, we will be requiring that the "DESTINATION\_CITY" field be completed on the enrollment roster. The "destination city" field is a free form (allowing up to 256 characters). If your traveler has multiple cities, please separate each destination by a comma. If this functionality is not compatible with your current enrollment system, please contact us to explore alternative options.

This will become effective for all enrollments submitted after **February 15th, 2016**

After this period, your enrollment will continue to be processed, however you will receive a warning message if any of the enrollments are missing "destination city".

Policy Number	Effective Date †	End Date †	Invoice	Template
19 GLMN 00000000	15-Aug-2019	14-Aug-2020	+ Create Invoice	Generate Template

Enrollment/Import tips

Please read the instructions before

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**.

Policy Number	Effective Date †	End Date †	Invoice	Template
19 GLMN 00000000	15-Aug-2019	14-Aug-2020	+ Create Invoice	Generate Template

Enrollment/Import tips

Please read the instructions before

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

PO Number  Save Delete Invoice

Please note: once you create a PO number it can not be modified.

Enrollments 0 + Add Individual Enrollment Import Enrollments Generate Template

Enrollments do not exist for this invoice. Please add or import 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](mailto:enrollments@mycisi.com) or call Kathleen Connors at 203-399-5509.*

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

PO Number  [Save](#) [Delete Invoice](#) [Close Invoice](#)

Please note: once you create a PO number it can not be modified.

**Enrollments 1** [+ Add Individual Enrollment](#) [Import Enrollments](#) [Generate Template](#)

Last Name	First Name	Birth Date	Start Date	End Date	Orig. Cntry	Dest. Cntry	Periods	Total	Action
SMITH	JOHN	12-Oct-1999	15-Aug-2019	21-Nov-2019	US	IT	98.0	121.52	<a href="#">Delete</a>

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**.

**Invoice Premium Summary** [View Invoice Report](#)

Number of Enrollees: 1

Total Insurance Fees: \$98.74

SSL Certificate

**Payment Information**

Expiration Date

Credit Card #

[Submit Payment](#)

[Pay Later By Check](#)

Click **Pay Later By Check** if you are not paying at this time.

Enter in Credit Card information if you are paying right away.

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

www.mycisi.com says

Your have choosen to pay this invoice at a later time. Payment must reach us within 30 days.

[OK](#) [Cancel](#)

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

Payment Method Accepted

Invoice Detail Report Invoice Cover Letter ID Cards

Your have chosen to pay this invoice at a later time. Payment must reach us within 30 days.

Send welcome email packages to all students in this invoice

☒ Send Welcome Package

Print | View | Email reports

Select all reports | Clear all

Email ? View/Print

☐ Invoice Details

☐ Invoice Details [Excel]

☐ Invoice Cover Letter

☐ Invoice ID Cards

Email

### Send Welcome Package Email

This will come from enrollments email address ([enrollments@culturalinsurance.com](mailto: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.

Send welcome email blast

If you would like to provide email addresses of the participants, please do so below and save them before sending welcome emails, otherwise please continue.

Last name	First name	Email Address
SMITH	JOHN	JSMITH@EXAMPLE.EDU

If you would like to receive a confirmation email, please enter a valid email address below.

Your email address

CC email address

Enter email address

1 out of 1 participant(s) have email addresses

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.)

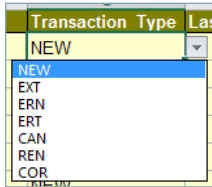
## 2. POLICY\_NUMBER (MANDATORY FIELD)

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)

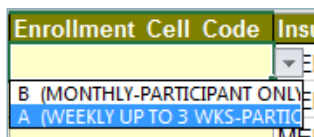
When the participant's coverage Ends (mm/dd/yyyy)

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** not 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** not 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.*

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

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

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)**

Optional Field – 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)**

Optional Field – 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**.

The screenshot shows the CISI (Cultural Insurance Services International) web application. At the top, there is a maroon header with the CISI logo and navigation links: Home, Participant Search, and Closed Invoice Search. Below the header, a light gray bar contains a search input field. A large pink banner contains a notice about the 'DESTINATION\_CITY' field requirement, effective February 15th, 2016. Below the banner is a table with columns: Policy Number, Effective Date †, End Date †, Invoice, and Template. The first row shows Policy Number 19 GLMN 00000000, Effective Date 15-Aug-2019, and End Date 14-Aug-2020. In the 'Invoice' column, the '+ Create Invoice' button is highlighted with a red circle. To the right of the table is a 'Generate Template' button. On the far right, there is a blue box with the text 'Enrollment/import tips' and a green box with the text 'Please read the instructions before'.

Policy Number	Effective Date †	End Date †	Invoice	Template
19 GLMN 00000000	15-Aug-2019	14-Aug-2020	<b>+ Create Invoice</b>	Generate Template

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

The screenshot shows the 'Add Enrollment' form in the CISI system. At the top, there is a 'PO Number' field with a 'Save' button and a 'Delete Invoice' button. Below this, a note states: '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.' Below the note is a blue bar with the text 'Enrollments 0'. In the center of this bar, the '+ Add Individual Enrollment' button is highlighted with a red circle. To the right of this button are 'Import Enrollments' and 'Generate Template' buttons. Below the blue bar, a message states: 'Enrollments do not exist for this invoice. Please add or import enrollments.'

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

The screenshot shows the 'Add Enrollment' form in the CISI system. The form is titled 'Add Enrollment' and contains several required fields marked with an asterisk (\*). The fields are: First Name, Last Name, Gender, Date of Birth (mm/dd/yyyy), Origin Country, Destination Country, Start Date (mm/dd/yyyy), End Date (mm/dd/yyyy), Program Name, Sponsor Partic Id, Email Address, Secondary Email Address, Phone Number, Coverage Type (Enrollment Cell), and Insurance Type (Reporting Cell). At the bottom of the form, there are 'Reset Form' and 'Cancel' buttons. The '+ Add Enrollment' button is highlighted with a red circle and labeled '\*Required Fields'.

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**.

PO Number  [Save](#)

Please note: once you create a PO number it can not be modified.

[Delete Invoice](#) [Close Invoice](#)

**Enrollments 1** [+ Add Individual Enrollment](#) [Import Enrollments](#) [Generate Template](#)

Last Name	First Name	Birth Date	Start Date	End Date	Orig. Cntry	Dest. Cntry	Periods	Total	Action
SMITH	JOHN	12-Oct-1999	15-Aug-2019	21-Nov-2019	US	IT	98.0	121.52	<a href="#">Delete</a>

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**.

**Invoice Premium Summary** [View Invoice Report](#)

Number of Enrollees: 1

Total Insurance Fees: \$98.74

SSL Certificate

**Payment Information**

Expiration Date

Credit Card #

[Submit Payment](#)

[Pay Later By Check](#)

Enter in Credit Card information if you are paying right away.

Click **Pay Later By Check** if you are not paying at this time.

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

www.mycisi.com says

Your have choosen to pay this invoice at a later time. Payment must reach us within 30 days.

[OK](#) [Cancel](#)



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

Payment Method Accepted

Invoice Detail Report Invoice Cover Letter ID Cards

Your have chosen to pay this invoice at a later time. Payment must reach us within 30 days.

Send welcome email packages to all students in this invoice

☒ Send Welcome Package

Print | View | Email reports

Select all reports | Clear all

Email ? View/Print

- ☐ Invoice Details
- ☐ Invoice Details [Excel]
- ☐ Invoice Cover Letter
- ☐ Invoice ID Cards

Email

### Send Welcome Package Email

This will come from enrollments email address ([enrollments@culturalinsurance.com](mailto: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.

Send welcome email blast

If you would like to provide email addresses of the participants, please do so below and save them before sending welcome emails, otherwise please continue.

Last name	First name	Email Address
SMITH	JOHN	JSMITH@EXAMPLE.EDU

If you would like to receive a confirmation email, please enter a valid email address below.

Your email address

CC email address

Enter email address

1 out of 1 participant(s) have email addresses

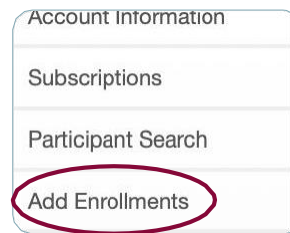
Receive an email with an excel spreadsheet to see if the email(s) went through successfully.

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

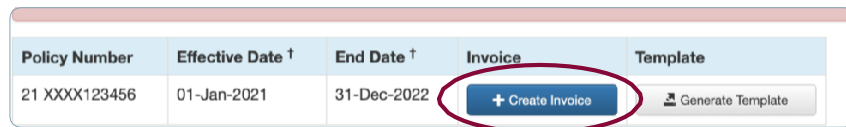
Click on **Send Emails** to complete the **Send Welcome Package** process.

# Date Corrections

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



2. Click on **Create Invoice**.




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


A form titled 'Change Existing Enrollments'. At the top, there is a 'PO Number' field with a 'Save' button and a 'Delete Invoice' button. Below this is a note: '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.' The main section has a header 'Enrollments 0' and a row of buttons: 'Change Existing Enrollments' (circled in red), '+ Add Individual Enrollment', 'Import Enrollments', and 'Generate Template'. At the bottom, it says '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**.

A form titled 'Change Enrollments' with a search section. It has fields for 'First name' (containing 'John'), 'Last name' (containing 'Johnson'), 'Gender' (a dropdown menu), 'Date of birth' (format mm/dd/yyyy), 'Participant Id', 'Sponsor Partic id', and 'Email'. At the bottom left is a 'Reset Form' button, and at the bottom right is a 'Search' button (circled in red).


**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

<b>Current Effective Date</b>	<b>Current End Date</b>
06/14/2021	01/01/2022
<b>New Effective Date</b>	<b>New End Date</b>
09/21/2021	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

<b>Current Effective Date</b>	<b>Current End Date</b>
06/14/2021	01/01/2022
<b>New Effective Date</b>	
09/21/2021	

Save Changes?

 Go Back to Results  Save Changes

Cancel 

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.

PO Number

Save

Delete Invoice

Close 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 2

Change Existing EnrollmentsAdd Individual EnrollmentImport EnrollmentsGenerate Template

Last Name	First Name	Birth Date	Start Date	End Date	Orig. Cntry	Dest. Cntry	Periods	Total	Action
JOHNSON	JOHN	29-Feb-1984	14-Jun-2021	01-Jan-2022	US	IT	-7.0	0.00	Delete
JOHNSON	JOHN	29-Feb-1984	21-Sep-2021	21-Jan-2022	US	IT	4.0	0.00	Delete

# 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](mailto: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.

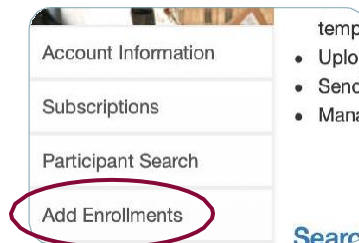
## Two ways to cancel coverage:

- **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**.

Policy Number	Effective Date †	End Date †	Invoice	Template
21 XXXX123456	01-Jan-2021	31-Dec-2022	<b>+ Create Invoice</b>	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


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: john  
Last name: johnson  
Gender: [dropdown]  
Date of birth: mm/dd/yyyy  
Participant Id: [dropdown]  
Sponsor Partic id: [dropdown]  
Email: [text]  
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	21-Sep-2021	21-Jan-2022	MED	US /FR	

**Search Again**

6. Select **Cancel Enrollment**.

Name	Partic Id	Dob	Gender	Email	Start Date	End Date	INS	Org/Dest	
JOHN JOHNSON	2548175	29-Feb-1984	M	EXAMPLE@EX.EDU	21-Sep-2021	21-Jan-2022	MED	US /FR	

Change Demographics  
Change Enrollment Dates  
**Cancel Enrollment**

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

Cancel Enrollment?

Cancel **OK**

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

PO Number

Save

Delete Invoice

Close 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 1

Change Existing Enrollments

Add Individual Enrollment

Import Enrollments

Generate Template

Last Name	First Name	Birth Date	Start Date	End Date	Orig. Cntry	Dest. Cntry	Periods	Total	Action
JOHNSON	JOHN	29-Feb-1984	21-Sep-2021	21-Jan-2022	US	FR	-4.0	0.00	<div>Delete</div>

**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](mailto: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](mailto: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**.

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

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

**CISI**  
CULTURAL INSURANCE  
SERVICES INTERNATIONAL

[Home](#) [Participant Search](#) [Start Another Invoice](#) [Closed Invoice Search](#) [Log Out](#)

PO Number  [Save](#)

[Delete Invoice](#)

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**.

**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	



6. Select **Change Demographics**.

Name	Partic Id	Dob	Gender	Email	Start Date	End Date	INS	Org/Dest	
JOHN JOHNSON	2548175	29-Feb-1984	M	EXAMPLE@EX.EDU	21-Sep-2021	21-Jan-2022	MED	US /IT	

Change Demographics

Change Enrollment Dates

Cancel Enrollment


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**

<input type="checkbox"/>	Last Name ↑	First Name	Participant Id	Dob	Gender	Email	Start Date	End Date	Origin Country	Dest. Country
<input type="checkbox"/>	JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	06/14/21	01/01/22	US	IT
<input type="checkbox"/>	JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	06/14/21	01/01/22	US	IT
<input type="checkbox"/>	JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	09/21/21	01/21/22	US	FR

## Search Participants

 Print | View | Email reports

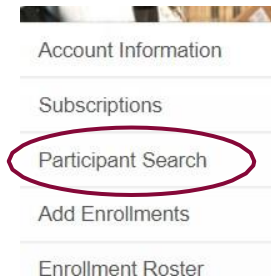
Grey font is for old enrollments and cancelled enrollments. The black font is the participant's correct coverage.

# 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**.

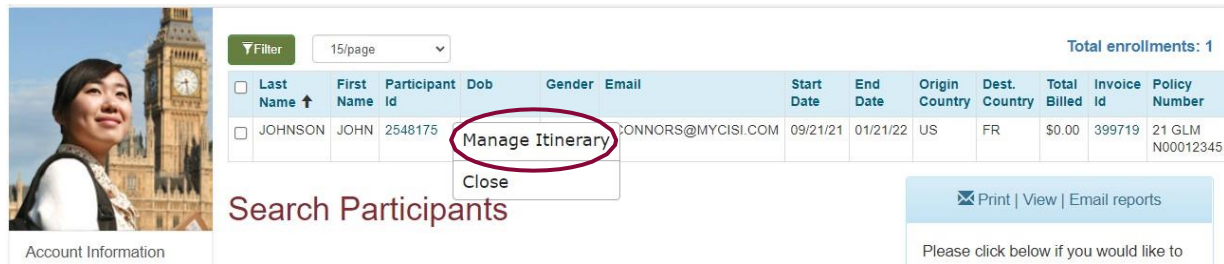
The 'Search Participants' form includes fields for First name, Last name, Gender, Date of birth, Country of origin, Country of destination, Coverage start/end dates, Program Name, Sponsor Partic Id, and PolicyNumber. There are checkboxes for 'Only show current enrollees as of:', 'Also search dependents', and 'Active Only'. A 'Reset Form' button and a 'Search' button (circled in red) are at the bottom.

3. Click on **Participant ID**.

The search results page shows a table with columns: Last Name, First Name, Participant ID, Dob, Gender, Email, Start Date, End Date, Origin Country, Dest. Country, Total Billed, Invoice Id, and Policy Number. The first row shows 'JOHNSON JOHN 2548175 02/29/1984 M KCONNORS@MYCISI.COM 09/21/21 01/21/22 US FR \$0.00 399719 21 GLM N00012345'. The 'Participant ID' '2548175' is circled in red. Below the table is a 'Send Welcome Package' button.

Last Name	First Name	Participant ID	Dob	Gender	Email	Start Date	End Date	Origin Country	Dest. Country	Total Billed	Invoice Id	Policy Number
JOHNSON	JOHN	2548175	02/29/1984	M	KCONNORS@MYCISI.COM	09/21/21	01/21/22	US	FR	\$0.00	399719	21 GLM N00012345

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



Account Information

Filter 15/page

Total enrollments: 1

<input type="checkbox"/>	Last Name ↑	First Name	Participant Id	Dob	Gender	Email	Start Date	End Date	Origin Country	Dest. Country	Total Billed	Invoice Id	Policy Number
<input type="checkbox"/>	JOHNSON	JOHN	2548175			JOHNNORS@MYCISI.COM	09/21/21	01/21/22	US	FR	\$0.00	399719	21 GLM N00012345

Manage Itinerary

Close

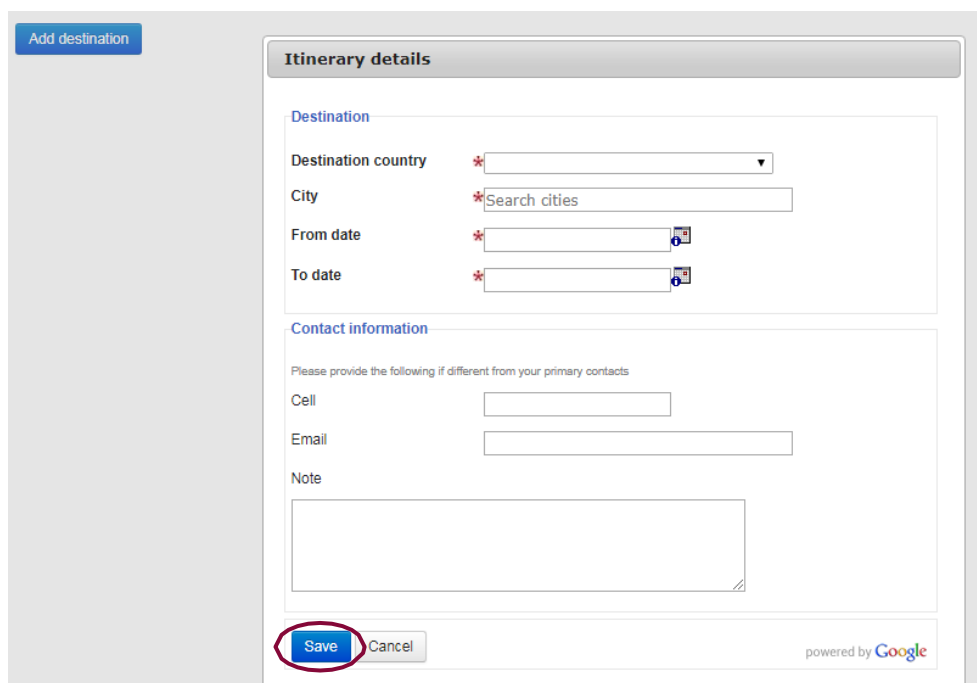
Search Participants

Print | View | Email reports

Please click below if you would like to

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.



Add destination

**Itinerary details**

Destination

Destination country \*

City \* Search cities

From date \*

To date \*

**Contact information**

Please provide the following if different from your primary contacts

Cell

Email

Note

Save Cancel

powered by Google

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

**Itinerary details:**

Country	City	From date	To date	Cell	Email	
ES	BARCELONA	10/01/2021	11/02/2021			Delete

Add destination

Close

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.