Subject: RE: Michael Best & Friedrich - Life Insurance for Caleb Brown, Spouse of Dana Neiswander (Production Log 148) [Secure]

From: Mary Phillips

 Date:
 Fri, 13 Jan 2017 16:25:40 +0000

 To:
 'Michelle Parker' , Debbie Kulling

Good Morning Michelle and Debbie,

We are seeing a problem with changes to spouse voluntary life and AD&D coverage for Dana Neiswander (Spouse Caleb Brown) that seems to have been triggered by an employee data change.

The email string that I am forwarding has all of the history.

I am auditing the voluntary life elections. I will let you know if I find any others.

Please take a look at this issue as soon as you can.

Thank you.

### Mary Phillips, CEBS

Enrollment System - Implementation Account Manager

The Benefit Services Group, Inc. |

www.bsg.com

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Mary.Phillips@BSG.com

Wellness Council of America (WELCOA) - Gold Well Workplace Award

American Heart Association –

Bronze Workplace Health Achievement

The Business Journal three-time recipient – Healthiest Employer Small Business Award

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From: Cathi Henke

Sent: Friday, January 13, 2017 9:47 AM

To: Mary Phillips <Mary.Phillips@bsg.com>

Cc: Amy Fischer < Amy. Fischer@bsg.com

Subject: RE: Michael Best & Friedrich - Life Insurance for Caleb Brown, Spouse of Dana Neiswander

Mary,

It seemed odd that her husband's life amount matches her Basic Life at \$87,000. There's an issue with reinstating his coverage. Dana carries \$500,000 of Voluntary Life, but I only see options for him up to \$87,000. This will need to be corrected.



Cathi Henke

Client Services Specialist

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From: Mary Phillips

Sent: Friday, January 13, 2017 9:30 AM

To: Cathi Henke <Cathi.Henke@bsg.com>

Cc: Amy Fischer < Amy. Fischer@bsg.com>

Subject: RE: Michael Best & Friedrich - Life Insurance for Caleb Brown, Spouse of Dana Neiswander

I don't know but I will report it to WorkTerra

Thanks for the super quick response and for doing the WT clean-up.

# Mary Phillips, CEBS

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From: Cathi Henke

Sent: Friday, January 13, 2017 9:27 AM

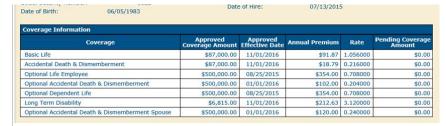
To: Mary Phillips < Mary.Phillips@bsg.com>

Cc: Amy Fischer <Amy.Fischer@bsg.com>

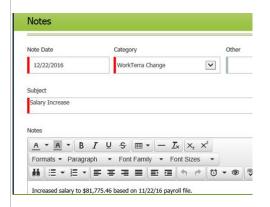
Subject: RE: Michael Best & Friedrich - Life Insurance for Caleb Brown, Spouse of Dana Neiswander

Good morning. I'm not seeing any changes at open enrollment. He has had \$500,000 in life for well over a year. I can reinstate it in WT.

Employee Information 1609 N. Prospect Avenue #501 Milwaukee Wisconsin 53202 United States Marital Status: Single Active Employee as of 07/13/2015 015 MBF BengRP E/NGF \$81,775.46 Employment Status: Member Group: 414-227-3475 Email Address djneiswander@michaelbest.com \*\*\* - \*\* - 8822 Annual Salary: Social Security Number:



My notes show that I adjusted her salary that day! How does that cause a change to her Spouse Life??



## Cathi Henke

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From: Mary Phillips

Sent: Friday, January 13, 2017 9:08 AM

To: Cathi Henke < Cathi.Henke@bsg.com>

Subject: Michael Best & Friedrich - Life Insurance for Caleb Brown, Spouse of Dana Neiswander

Hi,

Did Dana Neiswander make any changes to the voluntary life insurance coverage for her spouse Caleb.

I am checking for changes in the voluntary life deductions that would be effective on 1/1/2017.

I have them as originally electing

Employee Optional AD&D - Group E	\$4.25	Neiswander, Dana [Employee] - \$500000.00		
Employee Optional Life - Group E	\$14.75	Neiswander, Dana [Employee] - \$500000.00		
Spouse/Domestic Partner Optional AD&D - Group E	\$5.00	BROWN, CALEB [Spouse] - \$500000.00		
Spouse/Domestic Partner Optional Life - Group E	\$14.75	BROWN, CALEB [Spouse] - \$500000.00		
Manifesta Diama	Ć4E E0			

I do not know what happed 12/22/2016 with the Employee Data Change.

Thank you.

#### Enrollment History Report

Below is the list of all enrolled plans of selected benefit types effective within the selected date span.

Total Records : 4	tal Records : 4 Report							
Employee Name: Dana J Neiswander								
Plan Design Name	Coverage	Effective Period	Date Elected	Date Terminated	Election Method	Election Created By		
Spouse Term Life								
Spouse Term Life (spouse or domestic partner)-Spouse Term Life-Prudential	CALEB B BROWN [Spouse] - \$500000.00	08/25/2015 - 07/31/2016	11/14/2015	11/06/2016	Open Enrollment	SA SA		
Spouse/Domestic Partner Optional Life - Group E-Spouse Term Life-Prudential	CALEB B BROWN [Spouse] - \$500000.00	08/01/2016 - 10/31/2016	11/06/2016	12/22/2016	Employee Data Change	[Partner]Cathi Henke		
Spouse/Domestic Partner Optional Life - Group E-Spouse Term Life-Prudential	CALEB B BROWN [Spouse] - \$0.00	11/01/2016	12/22/2016	-	Employee Data Change	[Partner]Cathi Henke		
Spouse Accidental Death and Dismemberment								
Spouse Accidental Death and Dismemberment-Spouse Accidental Death and Dismemberment-Prudential	CALEB B BROWN [Spouse] - \$500000.00	01/01/2016 - 07/31/2016	11/19/2015	11/06/2016	Open Enrollment	SA SA		

Page No. 1

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