








# Enrollment System Overview





# Key Features

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-  Developed in-house, specifically for our clients' needs
-  Ability to back-date coverage up to 2 weeks
-  Add, edit and cancel enrollments
-  Bulk uploads via excel, or direct input from your system via API
-  Email, download and print ID cards and visa letters
-  Full search capabilities, including labeling groups of participants
-  Comprehensive history tracking for each participant

# Billing and Invoicing

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Invoicing options include; monthly per event or true monthly.

We also have two main options for enrollments:

## Group enrollment:

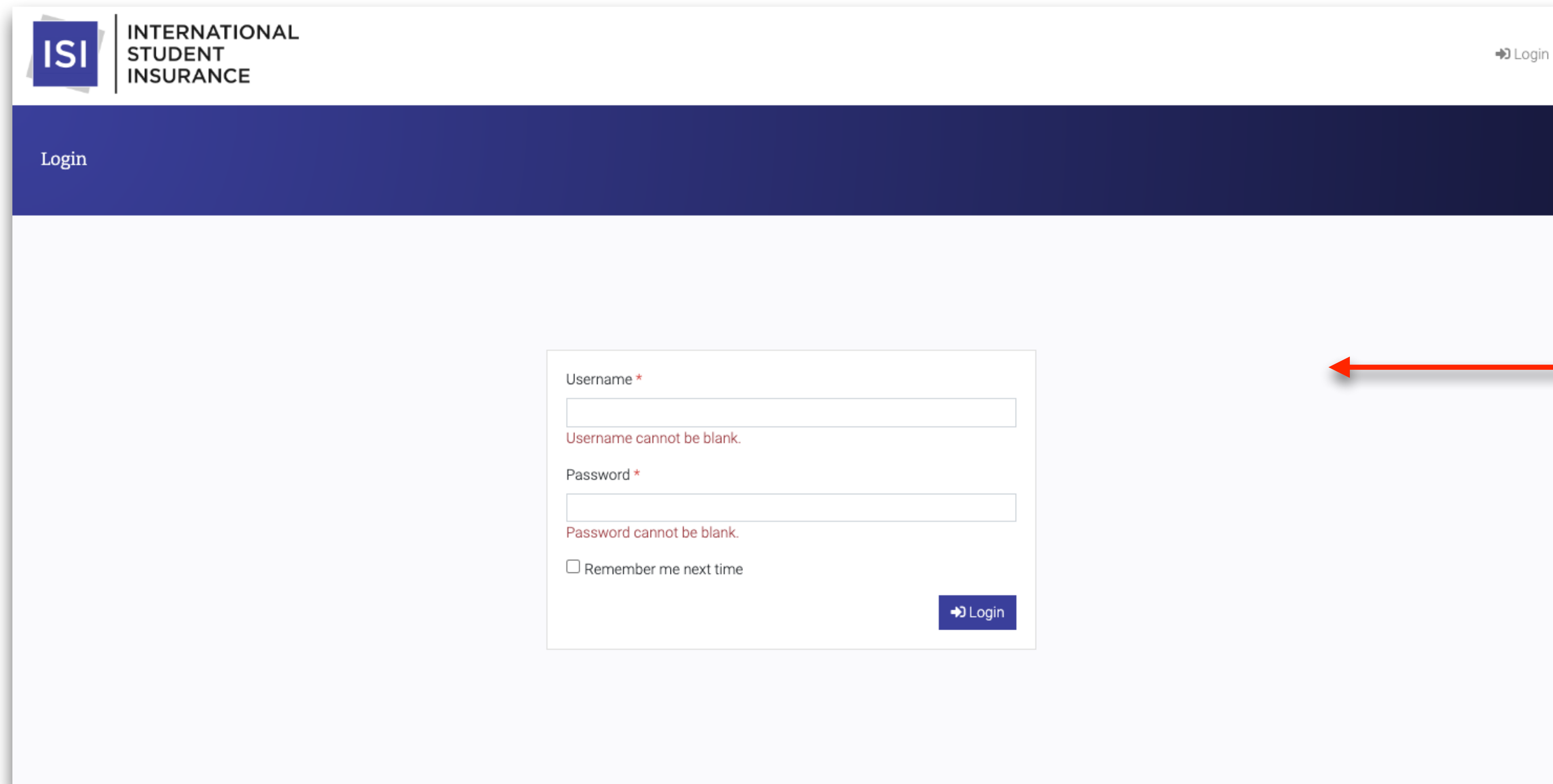
- The group administrator will handle enrollments, extensions, and renewals, and the invoices will be sent to them directly. Payment must be submitted by the group administrator.

## Individual enrollment:

- The participants will have to enroll on their own through their customized Student Zone and make their payment online or payment can be made by the group

# Login Page

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The screenshot shows the login page for ISI International Student Insurance. At the top left is the ISI logo and the text "INTERNATIONAL STUDENT INSURANCE". At the top right is a "Login" link with a right-pointing arrow icon. Below the header is a dark blue bar with the word "Login" in white. The main content area is light blue and contains a login form. The form has two input fields: "Username \*" and "Password \*". Below the username field is a red error message "Username cannot be blank." Below the password field is a red error message "Password cannot be blank." There is a checkbox labeled "Remember me next time" and a blue "Login" button with a right-pointing arrow icon.

ISI | INTERNATIONAL STUDENT INSURANCE

Login

Username \*

Username cannot be blank.

Password \*

Password cannot be blank.

☐ Remember me next time

Login

← Access to the tool is available through our homepage (link below). Each user will be provided with their own unique login to the tool, so please do not share login accounts.

[https://  
administrators.internationalstudentinsurance  
.com/enrollment/login/](https://administrators.internationalstudentinsurance.com/enrollment/login/)

# Dashboard

ISI

INTERNATIONAL  
STUDENT  
INSURANCE

Admin Home   Review Flags   Your Plans   Logout

EGI Dashboard

Search Participants

First Name

Date of Birth

Last Name

Note

Email

Internal ID

Labels

Extendable

Underwriter PAX ID

You may optionally enter a comparison operator (< <= > >= <> or =) at the beginning of each of your search values to specify how the comparison should be done.

Clear

Search

Active Plans

Showing 1-2 of 2 items.

Premium Sample Plan

Sample Underwriter

Upload Participants

Add Participants

View Participants

Sample Plan Basic

Sample Underwriter

Immediate Review<sup>®</sup>

Name

Plan

No participants to review.

Pending Plan Renewal

Pending Renewal - New<sup>®</sup>

Name

Plan

No participants in draft status.

Pending Renewal - Existing<sup>®</sup>

Name

Plan

No participants currently flagged.

API Documentation

Implementing the ISI Administrators API will allow you to process enrollments automatically from your database to our insurance database seamlessly. Gone are the days of manually entering insurance information or uploading excel sheets, and, best of all, there is no human error. View our documentation to get started.

View Documentation

Once you are logged into the enrollment tool, you will arrive at the dashboard, showing you the following:

- Participants under review
- New participants pending for renewal
- Existing participants pending for renewal
- Quick participant search
- Your plans

# Plan View



Premium Sample Plan - Plan View

Participants

View Upload History

Policy Documents

Add Participants

Upload Participants

Download Participants

Search Participants

Bulk Update

Wallet Passes

Current Period: 2002-12-01 to 2024-12-31

Current Travel Days 33,148

30,872

2,276

Used

Upcoming

Total Participants 158

6

124

26

5

89

75

7

0

151

<18

18-29

30-39

40+

Male

Female

Active

Inactive

Expired

Plan Details

Active

Plan Number

299956

Underwriter

Sample Underwriter

Policy Max

\$100,000 (€91,433)

Deductible

\$25

Total Participants

158

ER Fee

\$250

Base Price

\$4.00 Daily

Invoiced

Per Event

Average Span

211 days

Minimum Age

14D

Maximum Age

69Y

Personal Liability

No Coverage

Previous Plan(s)

Sample Plan Basic

Student Zone

Search

+

Upload

Showing 1-10 of 162 items.

First Name

Last Name

Date of Birth

Start Date

End Date

Age

Courtesy Date

Travel Days

Created

Updated

Status

Frank

Doe

1989-07-12

2023-08-01

2024-07-30

34

2024-08-31

365

2023-06-27

2023-06-27

Active

Rows:

10

Clicking on the plan name from the main dashboard, will take you to the plan view where you can see all the details about that particular plan including:

- Action dropdown menu
- Plan Summary Information
- Quick Actions (Search, Add Participant and Upload)
- Plan Statistics
- Participant List



# Participant List

















































































Option to select multiple records at one time, and then perform actions in bulk

Quick search and filter participants

ISIINTERNATIONAL STUDENT INSURANCE

Admin HomeReview FlagsYour PlansLogout






Showing 1-20 of 159 items.

<input type="checkbox"/>	First Name	Last Name	Date of Birth	Start Date	End Date	Age	Courtesy Date	Travel Days	Created	Updated	Status	
<input type="checkbox"/>	Jim	Smith	1990-04-23	2023-08-01	2024-07-30	33	2024-08-31	365	2023-06-27	2023-06-27	In-Active	   
<input type="checkbox"/>	Jane	Doe	1991-09-19	2023-08-01	2024-07-30	31	2024-08-31	365	2023-06-27	2023-06-27	In-Active	   
<input type="checkbox"/>	John	Doe	1992-10-08	2023-08-01	2024-07-30	30	2024-08-31	365	2023-06-27	2023-06-27	In-Active	   
<input type="checkbox"/>	Tom	Jones	2005-01-18	2023-01-19	2024-01-31	18	2024-01-01	378	2023-01-18	2023-06-27	Active	   
<input type="checkbox"/>	Sandra	Soame	2005-01-11	2023-01-20	2023-06-06	18	2024-01-01	138	2023-01-18	2023-02-07	Expired	   
<input type="checkbox"/>	Jim	Smith	1983-05-12	2022-08-02	2022-10-10	39	(not set)	70	2023-01-18	2023-01-18	Expired	   
<input type="checkbox"/>	Albert	James	1988-12-25	2022-08-02	2022-10-10	33	(not set)	70	2023-01-18	2023-01-18	Expired	   
<input type="checkbox"/>	Jane	Doe	1991-09-19	2022-08-02	2022-10-10	30	(not set)	70	2023-01-18	2023-01-18	Expired	   
<input type="checkbox"/>	Jon	Smithson	2004-09-21	2023-01-01	2023-01-01	18	(not set)	1	2022-09-20	2022-09-20	Expired	   
<input type="checkbox"/>	Edraz	Kuroda	1996-01-03	2021-01-20	2023-01-03	25	(not set)	714	2021-01-14	2022-06-01	Expired	   
<input type="checkbox"/>	Erica	Chan	2003-12-02	2022-01-01	2022-01-19	18	(not set)	19	2021-12-14	2021-12-14	Expired	   
<input type="checkbox"/>	ANGELA	CABRALES CALLE	2000-02-25	2021-12-14	2022-04-03	21	(not set)	111	2021-12-07	2021-12-07	Expired	   
<input type="checkbox"/>	NICOLLE CAROLINA	CESPEDES VELIZ	2000-06-11	2021-12-02	2022-03-22	21	(not set)	111	2021-12-07	2021-12-07	Expired	   
<input type="checkbox"/>	CRISTINA	CHAMORRO CUBAS	1999-11-15	2021-12-18	2022-04-18	22	(not set)	122	2021-12-07	2021-12-07	Expired	   
<input type="checkbox"/>	Mirian	Fernandez Poma	1995-01-30	2021-12-01	2021-12-01	26	(not set)	0	2021-12-02	2021-12-02	Cancelled	   
<input type="checkbox"/>	Juliana	Higdon	2002-02-14	2021-12-04	2022-02-05	19	(not set)	64	2021-11-30	2021-11-30	Expired	   
<input type="checkbox"/>	Alex	Hammond	1991-06-28	2021-12-04	2022-02-05	30	(not set)	64	2021-11-30	2021-11-30	Expired	   
<input type="checkbox"/>	Leah	Kates	2002-09-21	2021-12-04	2022-02-05	19	(not set)	64	2021-11-30	2021-11-30	Expired	   
<input type="checkbox"/>	James	Amarta	1994-01-12	2020-01-17	2020-04-16	26	(not set)	91	2020-01-16	2020-01-16	Expired	   
<input type="checkbox"/>	Me	James	1988-12-25	2020-01-22	2020-01-22	31	(not set)	0	2019-11-07	2019-11-13	Cancelled	   

<12345678>

With Selected Rows: [Export to XLS](#) [Cancel](#) [Edit](#) [Bulk Labels](#) [Email ID cards](#) [Download ID cards](#) [Email Visa Letters](#) [Download Visa Letters](#)

With Current Search Results: [Export to XLS](#)

- Individual actions:
-  View record
  -  Edit record
  -  Cancel record
  -  Access Documents
  -  Participant History

# Participant View

Viewing Jim Smith - Premium Sample Plan Plan Inactive

Manage Participant

Documents

View History

Back to Plan

This participant is not yet active.

First Name	Jim	Home Country Name	Argentina	Start Date	2023-08-01
Middle Name	C	Address Line 1	1236 Main St.	End Date	2024-07-30
Last Name	Smith	Address Line 2		Courtesy Date	2024-08-31
Gender	M	City	Anywhere	Travel Days	365
Date of Birth	1990-04-23	State Name	Florida	US Citizen	No
Email	test@internationalstudent.com	Country Name	United States	US Destination	Yes
CC Email		Postal Code	12553	Underwriter	Sample Underwriter
Status	In-Active	Telephone	555-5347	Note	sample notes
Internal ID	102			Labels	

This participant can be extended to: 2025-06-30 within the current policy period.

Student Zone

Created: 2023-06-27 10:14:39

Updated: 2023-06-27 10:14:39

Participant record details

- Dropdown Actions for:
- Managing Participant
  - Documents
  - Participant History
  - Back to Main Plan View



# Adding a Participant

Add Participants to Premium Sample Plan

Back to plan details

Participant 1

First Name \*

Middle Name

Last Name \*

Home Country Name \*

Email \*

CC Email

To add multiple CC Emails, separate each email with a comma. (Ex: t1@test.com,t2@test.com)

Telephone

Gender \*

Choose

Gender X

Yes

No

Date of Birth \*

Address Line 1

Address Line 2

City

Postal Code

Country Name

State Name

Internal ID

Note

Please enter any internal notes or reference numbers you need for this participant

Labels

US Citizen \*

Yes

No

US Destination \*

Yes

No

Start Date \*

End Date \*

Courtesy Date

The future end date to remind you this participant needs more than 700 days of coverage. You can renew 90 days prior to the expiration.

Save

Cancel

Add Another

- To add an individual participant:
- Click on “Add Participant” in the participant dropdown menu.
  - Complete the form with all the participants details and hit the green “Save” button.
  - A confirmation will appear on screen and you will have the option to email or download their documents.
  - Multiple participants can be added at once by clicking on the “Add Another” button.

Note - only the information marked with a red \* is required, all other fields can be left blank.

Confirmation on screen that the participant has been added:

Your participants have been saved.

Betty Mangrove (1998-11-30) ID Card | Visa Letter

# Bulk Uploads

Upload Participants/Changes to Premium Sample Plan

[View Plan](#)

Upload New Participants

Sample Spreadsheets:

- [Sample CSV File](#)
- [Sample XLS File](#)

File to Upload

Choose File

No file chosen

Please ensure that you are uploading only NEW participants. If you need to edit existing participants, please search for them in the participant listing and edit them directly.

\*Important Note: Please do not refresh your browser once you click "Upload". Large spreadsheets may take longer to process than others.

Upload

Cancel

To process a bulk upload:

- Click on “Upload Participants” in the participant dropdown menu.
- Download the sample file to view the data format.
- Once all your data is in this format, select “Choose file” and select the file with all your participant data.
- Hit the green “Upload” Button

**Note** - please do not hesitate to contact your Account Manager the first few times you do this, so they can assist you.



# Bulk Uploads Confirmation

Premium Sample Plan - Review Uploaded Participants

View Plan

Add Participants

Upload Participants

Items to process: 100% Complete

Caution

Please do not leave this page or hit submit until this process is 100%

Upload Information

Total Participants: 3

Participants With Errors: 0

Participants Displayed: 3

Participants Processed: 0

Participant Status

Total Flagged: 0

Total Draft Status: 0

Total Success: 0

Total Still Processing: 0

Congratulations, your upload has been successful!

Please review the entries below to make sure they are accurate before hitting the "Save" button at the bottom of the page to confirm these entries to your plan. If there are any problems with the uploads, the problem entries will be highlighted in red. Please adjust the highlighted entry so that it is correct – do this for all problem entries and then hit "Save" at the bottom of this page.

Participant 1

First Name \*

Albert

Middle Name

D

Last Name \*

Smith

Home Country Name \*

Argentina

Email \*

test@internationalstudent.com

CC Email

Telephone

555-5346

Gender \*

Male

Gender X

Yes

No

Date of Birth \*

1990-02-08

Address Line 1

1237 Main St.

Address Line 2

Box 30

City

Anywhere

Postal Code

12554

Country Name

United States

State Name

Florida

Internal ID

103

Note

sample notes

Labels

US Citizen \*

Yes

No

US Destination \*

Yes

No

Start Date \*

2023-08-01

End Date \*

2024-07-30

Courtesy Date

2024-08-31

Coverage is for 365 days.

The future end date to remind you this participant needs more than 700 days of coverage. You can renew 90 days prior to the expiration.

Items to process: 100% Complete

Caution

Please do not leave this page or hit submit until this process is 100%

Upload Information

Total Participants: 3

Participants With Errors: 0

Participants Displayed: 3

Participants Processed: 3

Participant Status

Total Flagged: 0

Total Draft Status: 0

Total Success: 3

Total Still Processing: 0

Your form submission is now being processed! Please wait...

As each participant is processed, the enrollment status field will update or you will be presented with the person's form a second time to correct their information. Please do not resubmit the page until all records have been processed to 100%!

The following were saved successfully:

Pax ID	Name	ID Card	Visa Letter
840696	Albert D Smith	ID Card	Visa Letter
840697	Frank A Doe	ID Card	Visa Letter
840698	Jane C Smith	ID Card	Visa Letter

Return to Plan

Email ID Cards

Download ID

Email Visa Letters

Download Visa

Email ID & Visa

NOTE: You will not be able to send documents for Flagged participants.

The bulk upload process is a 2-Step process, so once you upload you can review the uploads to confirm everything is correct.

- If you find any errors, you can directly adjust them here.
- Make sure the “Items to process” is at 100%, especially if you have a large list.
- The upload can take up to 1,000 participants at one time.
- To complete an upload, click “Save”.

You will then receive this confirmation on screen showing you the process is 100% complete and the ability to email or download plan documents.

# Editing a Participant

Showing 1-20 of 162 items.

First Name

Last Name

Date of Birth

Start Date

End Date

Age

Courtesy Date

Travel Days

Created

Updated

Status

All

Jane

Smith

1989-01-08

2023-08-01

2024-07-30

34

2024-08-31

365

2023-06-27

2023-06-27

In-Active

Frank

Doe

1989-07-12

2023-08-01

2024-07-30

34

2024-08-31

365

2023-06-27

2023-06-27

In-Active

Albert

Smith

1990-02-08

2023-08-01

2024-07-30

33

2024-08-31

365

2023-06-27

2023-06-27

In-Active

Jim

Smith

1990-04-23

2023-08-01

2024-07-30

33

2024-08-31

365

2023-06-27

2023-06-27

In-Active

Jane

Doe

1991-09-19

2023-08-01

2024-07-30

31

2024-08-31

365

2023-06-27

2023-06-27

In-Active

John

Doe

1992-10-08

2023-08-01

2024-07-30

30

2024-08-31

365

2023-06-27

2023-06-27

In-Active

Tom

Jones

2005-01-18

2023-01-19

2024-01-31

18

2024-01-01

378

2023-01-18

2023-06-27

Active

Sandra

Soame

2005-01-11

2023-01-20

2023-06-06

18

2024-01-01

138

2023-01-18

2023-02-07

Expired

Jim

Smith

1983-05-12

2022-08-02

2022-10-10

39

(not set)

70

2023-01-18

2023-01-18

Expired

Albert

James

1988-12-25

2022-08-02

2022-10-10

33

(not set)

70

2023-01-18

2023-01-18

Expired

Jane

Doe

1991-09-19

2022-08-02

2022-10-10

30

(not set)

70

2023-01-18

2023-01-18

Expired

Jon

Smithson

2004-09-21

2023-01-01

2023-01-01

18

(not set)

1

2022-09-20

2022-09-20

Expired

Edraz

Kuroda

1996-01-03

2021-01-20

2023-01-03

25

(not set)

714

2021-01-14

2022-06-01

Expired

Erica

Chan

2003-11-11

2023-01-01

2023-01-01

20

(not set)

1

2022-09-20

2022-09-20

Expired

ANGELA

CABRALES CALLE

2000-01-01

2023-01-01

2023-01-01

23

(not set)

1

2022-09-20

2022-09-20

Expired

NICOLLE CAROLINA

CESPEDES VELIZ

2000-01-01

2023-01-01

2023-01-01

23

(not set)

1

2022-09-20

2022-09-20

Expired

CRISTINA

CHAMORRO CUBAS

1999-11-11

2023-01-01

2023-01-01

24

(not set)

1

2022-09-20

2022-09-20

Expired

Mirian

Fernandez Poma

1995-01-01

2023-01-01

2023-01-01

28

(not set)

1

2022-09-20

2022-09-20

Expired

Julianna

Higdon

2002-02-01

2023-01-01

2023-01-01

21

(not set)

1

2022-09-20

2022-09-20

Expired

Alex

Hammond

1991-01-01

2023-01-01

2023-01-01

32

(not set)

1

2022-09-20

2022-09-20

Expired

Rows: 20

Admin Home

Review Flags

Your Plans

Logout

ISI

INTERNATIONAL STUDENT INSURANCE

Viewing Jane Smith - Premium Sample Plan Plan

Inactive

Manage Participant

Update

Cancel

Move

With Selected Rows:

Export to XLS

Cancel

Edit

Bulk Labels

Export

With Current Search Results:

Export to XLS

First Name

Jane

Middle Name

C

Last Name

Smith

Gender

F

Date of Birth

1989-01-08

Email

test@internationalstudent.com

CC Email

Status

In-Active

Internal ID

106

Home Country Name

Argentina

Address Line 1

1240 Main St.

Address Line 2

City

Anywhere

State Name

Florida

Country Name

United States

Postal Code

12552

Telephone

555-5348

Start Date

2023-08-01

End Date

2024-07-30

Courtesy Date

2024-08-31

Travel Days

365

US Citizen

No

US Destination

Yes

Underwriter

Sample Underwriter

Note

sample notes

Labels

This participant is not yet active.

This participant can be extended to: 2025-06-30 within the current policy period.

Created: 2023-06-27 12:26:40 Updated: 2023-06-27 12:26:40

Student Zone

Edits or updates are possible. You can locate the participant in the dropdown menu. Update

7 Edits or updates to a participants details is possible through the system. Simply locate the participant and click on the “pencil” icon in the plan view, or in the participant view, click on the “Update” link in the dropdown menu.

Update the record and click “Save”

**Note** - in some cases the edit or update button might not be available, or the actual fields of the record greyed out. This is because the update could not be made, for example on an expired record.



# Cancelling a Participant

Showing 1-20 of 162 items.

First Name

Last Name

Date of Birth

Start Date

End Date

Age

Courtesy Date

Travel Days

Created

Updated

Status

Rows:

20

<input type="checkbox"/>	Jane	Smith	1989-01-08	2023-08-01	2024-07-30	34	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Frank	Doe	1989-07-12	2023-08-01	2024-07-30	34	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Albert	Smith	1990-02-08	2023-08-01	2024-07-30	33	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jim	Smith	1990-04-23	2023-08-01	2024-07-30	33	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jane	Doe	1991-09-19	2023-08-01	2024-07-30	31	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	John	Doe	1992-10-08	2023-08-01	2024-07-30	30	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Tom	Jones	2005-01-18	2023-01-19	2024-01-31	18	2024-01-01	378	2023-01-18	2023-06-27	Active	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Sandra	Soame	2005-01-11	2023-01-20	2023-06-06	18	2024-01-01	138	2023-01-18	2023-02-07	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jim	Smith	1983-05-12	2022-08-02	2022-10-10	39	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Albert	James	1988-12-25	2022-08-02	2022-10-10	33	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jane	Doe	1991-09-19	2022-08-02	2022-10-10	30	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jon	Smithson	2004-09-21	2023-01-01	2023-01-01	18	(not set)	1	2022-09-20	2022-09-20	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Edraz	Kuroda	1996-01-03	2021-01-20	2023-01-03	25	(not set)	714	2021-01-14	2022-06-01	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Erica	Chan	20									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	ANGELA	CABRALES CALLE	20									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	NICOLLE CAROLINA	CESPEDES VELIZ	20									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CRISTINA	CHAMORRO CUBAS	19									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Mirian	Fernandez Poma	19									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Julianna	Higdon	20									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Alex	Hammond	19									<div><div></div><div></div><div></div><div></div><div></div><div></div></div>

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With Selected Rows:

Export to XLS

Cancel

Edit

Bulk Labels

With Current Search Results:

Export to XLS

ISI

INTERNATIONAL STUDENT INSURANCE

Admin Home

Review Flags

Your Plans

Logout

Viewing Jane Smith - Premium Sample Plan Plan

Inactive

Manage Participant

Documents

View History

Back to Plan

Update

Cancel

Move

This participant is not yet active.

First Name

Jane

Middle Name

C

Last Name

Smith

Gender

F

Date of Birth

1989-01-08

Email

test@internationalstudent.com

CC Email

Status

In-Active

Internal ID

106

Home Country Name

Argentina

Address Line 1

1240 Main St.

Address Line 2

City

Anywhere

State Name

Florida

Country Name

United States

Postal Code

12552

Telephone

555-5348

Start Date

2023-08-01

End Date

2024-07-30

Courtesy Date

2024-08-31

Travel Days

365

US Citizen

No

US Destination

Yes

Underwriter

Sample Underwriter

Note

sample notes

Labels

This participant can be extended to: 2025-06-30 within the current policy period.

Student Zone

Created: 2023-06-27 12:26:40

Updated: 2023-06-27 12:26:40

Simply locate the participant and either click on the “cancel” icon in the plan view, or in the participant view click on the “Cancel” link in the dropdown menu.

Confirm the cancellation, and hit submit.

Note - cancellations are only possible before coverage has become effective. If coverage has started, you can end coverage early simply by editing the records end date to shorten the coverage period.

# Documents - Plan View

Showing 1-20 of 162 items.

First Name

Last Name

Date of Birth

Start Date

End Date

Age

Courtesy Date

Travel Days

Created

Updated

Status

Rows:

20

<input type="checkbox"/>	Jane	Smith	1989-01-08	2023-08-01	2024-07-30	34	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Frank	Doe	1989-07-12	2023-08-01	2024-07-30	34	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Albert	Smith	1990-02-08	2023-08-01	2024-07-30	33	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jim	Smith	1990-04-23	2023-08-01	2024-07-30	33	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jane	Doe	1991-09-19	2023-08-01	2024-07-30	31	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	John	Doe	1992-10-08	2023-08-01	2024-07-30	30	2024-08-31	365	2023-06-27	2023-06-27	In-Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Tom	Jones	2005-01-18	2023-01-19	2024-01-31	18	2024-01-01	378	2023-01-18	2023-06-27	Active	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Sandra	Soame	2005-01-11	2023-01-20	2023-06-06	18	2024-01-01	138	2023-01-18	2023-02-07	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jim	Smith	1983-05-12	2022-08-02	2022-10-10	39	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Albert	James	1988-12-25	2022-08-02	2022-10-10	33	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jane	Doe	1991-09-19	2022-08-02	2022-10-10	30	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Jon	Smithson	2004-09-21	2023-01-01	2023-01-01	18	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Edraz	Kuroda	1996-01-03	2021-01-20	2023-01-03	25	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Erica	Chan	2003-12-02	2022-01-01	2022-01-19	18	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	ANGELA	CABRALES CALLE	2000-02-25	2021-12-14	2022-04-03	21	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	NICOLLE CAROLINA	CESPEDES VELIZ	2000-06-11	2021-12-02	2022-03-22	21	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	CRISTINA	CHAMORRO CUBAS	1999-11-15	2021-12-18	2022-04-18	22	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Mirian	Fernandez Poma	1995-01-30	2021-12-01	2021-12-01	26	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Julianna	Higdon	2002-02-14	2021-12-04	2022-02-05	19	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
<input type="checkbox"/>	Alex	Hammond	1991-06-28	2021-12-04	2022-02-05	30	(not set)	70	2023-01-18	2023-01-18	Expired	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>

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With Selected Rows:

Export to XLS

Cancel

Edit

Bulk Labels

Email ID cards

Download ID cards

Email Visa Letters

Download Visa Letters

With Current Search Results:

Export to XLS

Visa Letter and ID Card Documents

To download or send documents to the participant's email on file, please select the corresponding button below:

ID Card

Visa Letter

ID & Visa

ID Card

Visa Letter

If you are experiencing issues with this participant's Apple Wallet Pass, force regeneration of the pass using the button below:

Force re-generate Wallet Pass

If you would like to combine their documents, and/or send them to an alternate email address, please select the options below and hit submit:

Combine, Email, and/or Download Documents

Selected Options

☐ Email ID Card

☐ Download ID Card

☐ Email Visa Letter

☐ Download Visa Letter

Alternate Recipient

Recipient Name

Recipient Email

If you leave the alternate recipient information blank, the documents will be sent to the name and address on file for the participant.

Close

Submit

When adding a participant into the system, you can download or email their documents right away, presuming the record isn't flagged for review.

If you wish to access these documents later, click on the paper icon to bring up the documents view:

- Download or email ID Card
- Download or email Visa Letter
- Combine documents to send
- Send documents to an alternative recipient such as a host family



# Documents - Participant View

Viewing Jane Smith - Premium Sample Plan Plan Inactive

[Manage Participant](#) [Documents](#) [View History](#) [Back to Plan](#)

This participant is not yet active.

First Name	Jane	Home Country Name	Argentina	Start Date	
Middle Name	C	Address Line 1	1240 Main St.	End Date	
Last Name	Smith	Address Line 2		Courtesy Date	2024-08-31
Gender	F	City	Anywhere	Travel Days	365
Date of Birth	1989-01-08	State Name	Florida	US Citizen	No
Email	test@internationalstudent.com	Country Name	United States	US Destination	Yes
CC Email		Postal Code	12552	Underwriter	Sample Underwriter
Status	In-Active	Telephone	555-5348	Note	sample notes
Internal ID	106			Labels	

This participant can be extended to: 2025-06-30 within the current policy period.

Student Zone →

Created: 2023-06-27 12:26:40 Updated: 2023-06-27 12:26:40

You can also access a participant's documents (including their digital ID card for mobile devices) directly from the participant view and clicking on the documents dropdown menu.

# Exporting Participant Lists

Showing 1-20 of 162 items.

☐

First Name

☐

Last Name

☐

Date of Birth

☐

Start Date

☐

End Date

☐

Age

☐

Courtesy Date

☐

Travel Days

☐

Created

☐

Updated

☐

Status

☐

Jane

☐

Frank

☐

Albert

☐

Jim

☐

Jane

☐

John

☐

Tom

☐

Sandra

☐

Jim

☐

Albert

☐

Jane

☐

Jon

☐

Edraz

☐

Erica

☐

ANGELA

☐

NICOLLE CAROLINA

☐

CRISTINA

☐

Mirian

☐

Julianne

☐

Alex

Smith

Doe

Smith

Smith

Doe

Doe

Jones

Soame

Smith

James

Doe

Smithson

Kuroda

Chan

CABRALES CALLE

CESPEDES VELIZ

CHAMORRO CUBAS

Fernandez Poma

Higdon

Hammond

1989-01-08

1989-07-12

1990-02-08

1990-04-23

1991-09-19

1992-10-08

2005-01-18

2005-01-11

1983-05-12

1988-12-25

1991-09-19

2004-09-21

1996-01-03

2003-12-02

2000-02-25

2000-06-11

1999-11-15

1995-01-30

2002-02-14

1991-06-28

2023-08-01

2023-08-01

2023-08-01

2023-08-01

2023-08-01

2023-08-01

2023-01-19

2023-01-20

2022-08-02

2022-08-02

2022-08-02

2023-01-01

2023-01-03

2022-01-01

2021-12-14

2022-04-03

2022-03-22

2021-12-18

2021-12-01

2021-12-04

2021-12-04

2024-07-30

2024-07-30

2024-07-30

2024-07-30

2024-07-30

2024-07-30

2024-01-31

2023-06-06

2022-10-10

2022-10-10

2022-10-10

2023-01-01

2023-01-03

2022-01-19

2022-04-03

2022-04-18

2021-12-01

2022-02-05

2022-02-05

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70

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1

714

19

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122

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64

2023-06-27

2023-06-27

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2023-01-18

2023-01-18

2022-09-20

2021-01-14

2021-12-14

2021-12-07

2021-12-07

2021-12-07

2021-12-02

2021-11-30

2021-11-30

2023-06-27

2023-06-27

2023-06-27

2023-06-27

2023-06-27

2023-06-27

2023-02-07

2023-01-18

2023-01-18

2023-01-18

2023-01-18

2022-09-20

2022-09-01

2021-12-14

2021-12-07

2021-12-07

2021-12-07

2021-12-02

2021-11-30

2021-11-30

In-Active

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With Selected Rows: [Export to XLS](#) [Cancel](#) [Edit](#) [Bulk Labels](#) [Email ID cards](#) [Download ID cards](#) [Email Visa Letters](#) [Download Visa Letters](#)

With Current Search Results: [Export to XLS](#)

If you would like to export your list of participants, you can do this from the plan list view by clicking on the “Export XLS” link at the bottom of the page.

**Note** - if you want to only export a certain group of participants, you can use the filter and advanced search sections to modify your data and just export that subset.



# Frequently Asked Questions

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## What is a participant in immediate review status?

A participant will typically be in review because of the following situations:

- Back-dating of the policy start date
- Duplicate participant found in the system
- Enrollment outside of your plan policy period

When this happens, there is nothing you need to do. Our team continually reviews participants in review and will deal with them within 12 to 24 hours. They will either be automatically approved, or your Account Manager will reach out to you to fix the error.

## What is a participant in pending renewal status?

A participant who has been enrolled, extended, or renewed outside of their plan's policy period. You will typically see this happen as you come up to your plan renewal.

If this happens, the pending renewal status pends the participant until the plan is renewed. Once that happens, the pending renewal status is lifted and the participant will be live in the system again. You can contact your Account Manager should this happen to find out the status of your plan's renewal.

## I'm having problems enrolling a participant, it says that the dates are invalid?

Whether a participant is being enrolled individually or in a bulk upload, it is important that all dates are in the yyyy-mm-dd format.

## What are your standard enrollment criteria?

Typically our enrollment criteria is as follows:

- Coverage starting anytime in the future, or up to 2 weeks in the past (note backdating coverage will put them in review).
- Edits can be made at anytime, but once a plan is effective only the end date and certain fields such as address can be updated.
- Cancellations can be made before a plan becomes effective, if a plan is already effective you will need to end coverage early and pay for the days used.

These terms may vary from plan-to-plan if you have agreed this ahead of time.

## What is the difference between a cancellation and an early return?

A cancellation of a policy is only allowed before the plan becomes effective, and allows you to terminate the whole plan coverage period and receive a full refund.

If a policy has already started, cancellation is not possible but you can process an early return. Simply adjust the participants plan end date, and any days unused will be credited back on the next invoice.



# Frequently Asked Questions

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## **The participant I enrolled was flagged as a duplicate. What do I do?**

A participant may be flagged in the system if the information is similar to that already present in the enrollment tool. If you are adding in a participant manually, you will notice a yellow box will appear as you add participants information so you can quickly see if this is truly a duplicate. If you still add the participant, or are adding them through our API or via bulk excel upload, you may notice some are flagged as duplicate.

If this occurs, from the main dashboard you can see all the participants that are currently flagged. If they are showing up as duplicate, you can click on their name and then either select the yellow “Not Duplicate” button or the red “Remove Duplicate” button to clear that duplicate flag.

All other flags will be handled by your Account Manager, and are done within 24 hours, often much sooner.

## **The system only allows me to enroll a participant up to 364 or 365 days. How can I extend coverage?**

Depending on your plan, participants can only have 364 or 365 days of coverage at any one time. However, if you have a participant who needs coverage beyond this period you can still handle this through a policy renewal.

To do this, you would report the initial 364 days of coverage and then in the “Courtesy Date” field you would put your final end date of that participants coverage. 90 days before the initial expiration date you will receive an email informing you of all the policies that will expire within the next 90 days (the courtesy date participants will be highlighted in blue). This is also viewable by clicking on the “Review Expiring” button in the plan view.

To extend coverage, simply update the policy expiration date to extend the plan and remove the courtesy date in the same action.



We also offer further customization through:

- **API Functionality** - If you wish to send enrollments electronically directly from your system, we have a dedicated API that has been built to facilitate that.
- **Email Customization** - Email template customization is available for initial enrollment emails, welcome emails and renewal emails.

Please contact your Account Manager for more details on these features and implementing them.



# Enrollment System Overview

Thank you for your time, if you would like a live demo, please contact us directly and we would be happy to assist you

[info@internationalstudentinsurance.com](mailto:info@internationalstudentinsurance.com)

<http://www.InternationalStudentInsurance.com>

Toll Free USA (877) 926-0042

International +1 (904) 478-0002