

Enrollment System Overview



Key Features

- 🏠 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

Invoicing options include; monthly per event or true monthly.

We also have two main options for enrollments:

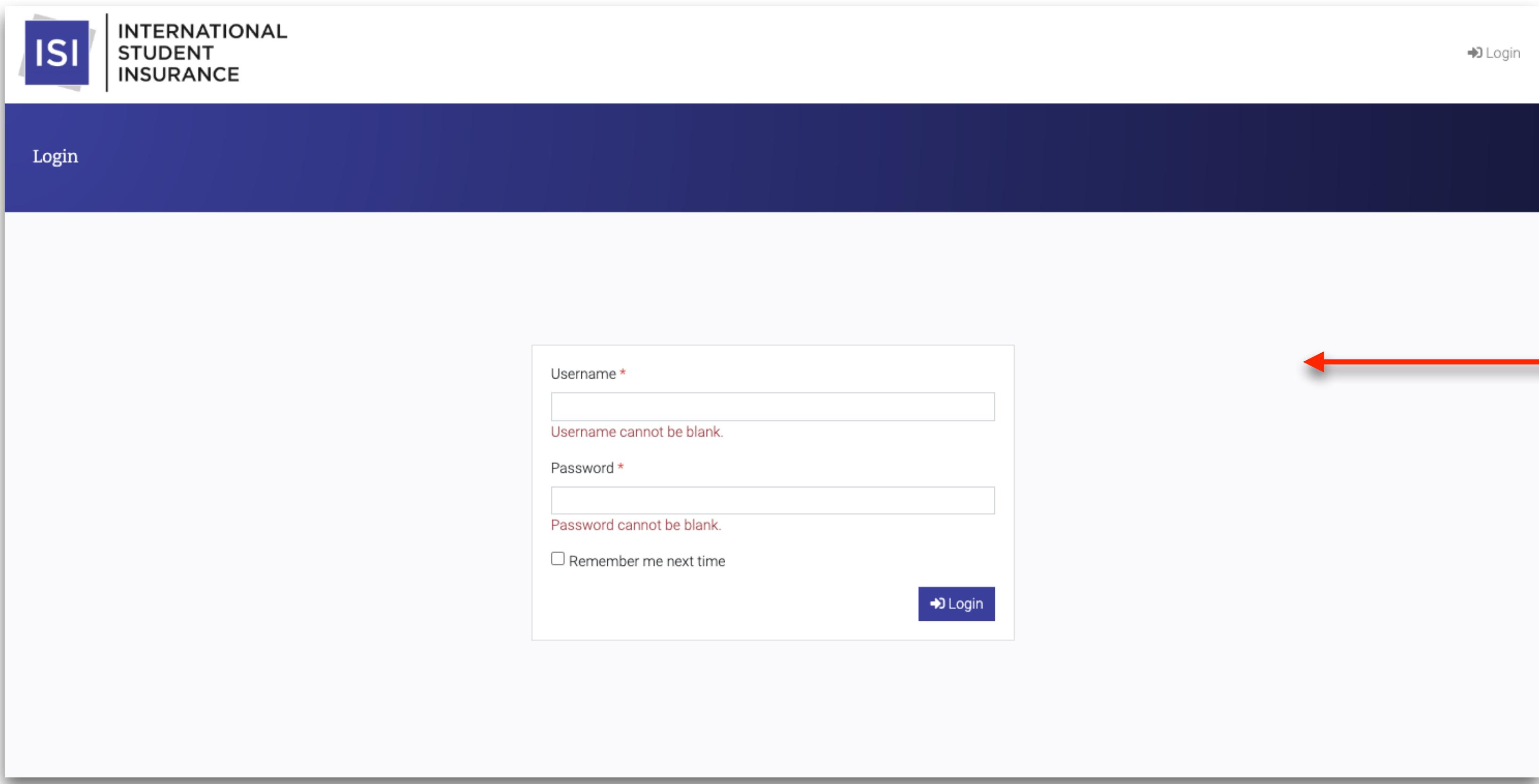
Group enrollment:

- 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



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

The screenshot shows the ISI Enrollment Tool Dashboard. At the top, there is a search bar for 'Search Participants' with fields for First Name, Last Name, Email, Labels, Underwriter PAX ID, Date of Birth, Note, Internal ID, and Extendable. Below this is a section for 'Active Plans' showing 'Premium Sample Plan' and 'Sample Plan Basic'. On the right side, there are three sections: 'Immediate Review' (No participants to review), 'Pending Plan Renewal' (No participants in draft status), and 'Pending Renewal - Existing' (No participants currently flagged). At the bottom right, there is an 'API Documentation' section with a link to '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

INTERNATIONAL STUDENT INSURANCE

Premium Sample Plan - Plan View

Current Travel Days [33,148]

Total Participants [158]

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 →

Action dropdown menu

Plan Summary Information

Quick Actions

(Search, Add Participant and Upload)

Plan Statistics

Participant List

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	Actions
Frank	Doe	1989-07-12	2023-08-01	2024-07-30	34	2024-08-31	365	2023-06-27	2023-06-27	Active	

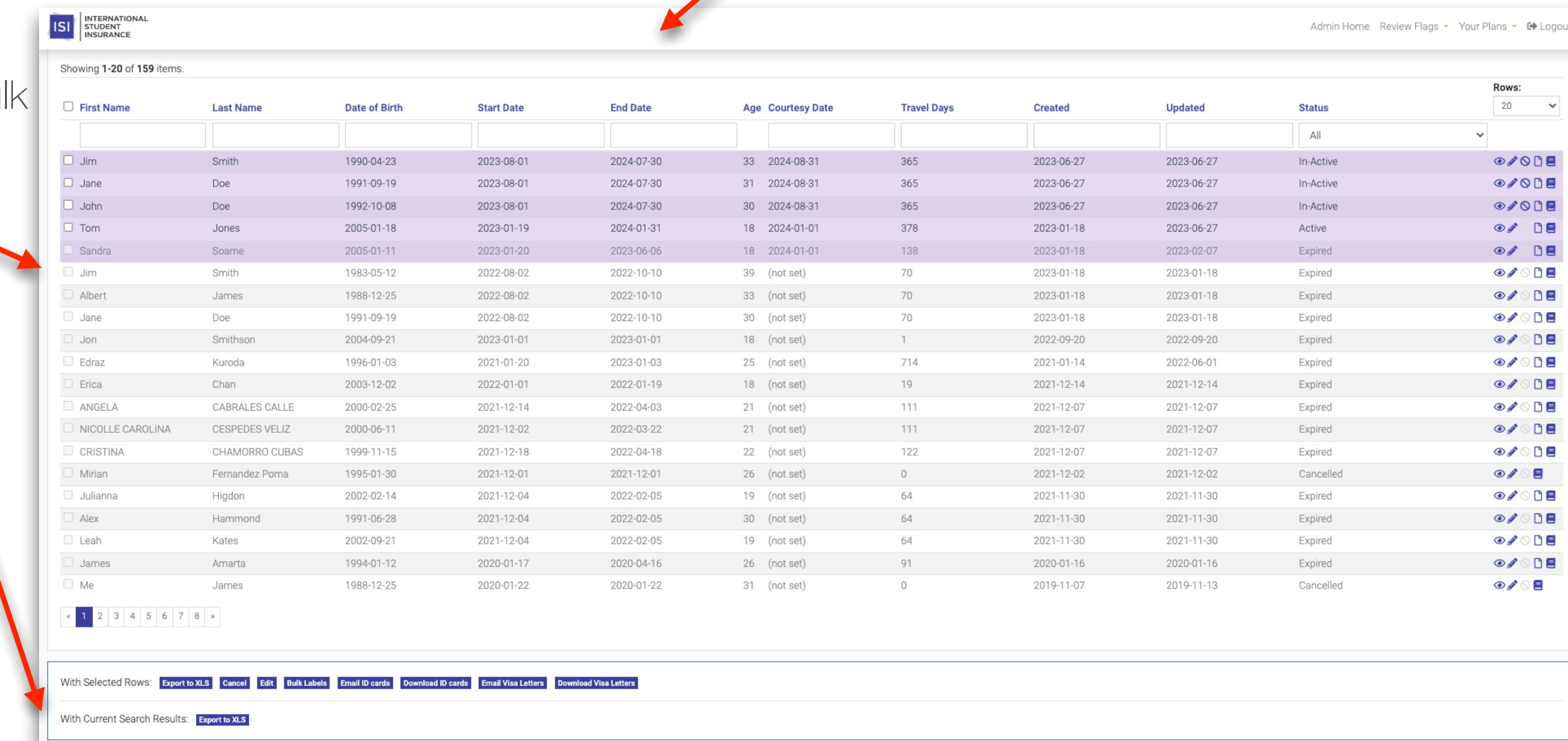
Clicking on the plan name from the main dashboard, will take you to the plan view where you can see all the details about that particular plan including:

- 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



The screenshot shows a participant list interface with the following features:

- Header:** ISI INTERNATIONAL STUDENT INSURANCE, Admin Home, Review Flags, Your Plans, Logout.
- Search/Filter:** A search bar at the top right with placeholder text "Quick search and filter participants".
- Table:** A grid of 159 items with columns: First Name, Last Name, Date of Birth, Start Date, End Date, Age, Courtesy Date, Travel Days, Created, Updated, Status, and a "Select" column.
- Actions:** A "Rows:" dropdown set to 20, and a "Select" column with checkboxes for each row.
- Bottom Buttons:** Buttons for "With Selected Rows" (Export to XLS, Cancel, Edit, Bulk Labels, Email ID cards, Download ID cards, Email Visa Letters, Download Visa Letters) and "With Current Search Results" (Export to XLS).

Red arrows point to the search/filter bar, the "Select" column, and the bottom buttons.

First Name	Last Name	Date of Birth	Start Date	End Date	Age	Courtesy Date	Travel Days	Created	Updated	Status	Select				
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	2003-12-02	2022-01-01	2022-01-19	18	(not set)	19	2021-12-14	2021-12-14	Expired					
ANGELA	CABRALES CALLE	2000-02-25	2021-12-14	2022-04-03	21	(not set)	111	2021-12-07	2021-12-07	Expired					
NICOLLE CAROLINA	CESPEDES VELIZ	2000-06-11	2021-12-02	2022-03-22	21	(not set)	111	2021-12-07	2021-12-07	Expired					
CRISTINA	CHAMORRO CUBAS	1999-11-15	2021-12-18	2022-04-18	22	(not set)	122	2021-12-07	2021-12-07	Expired					
Mirian	Fernandez Poma	1995-01-30	2021-12-01	2021-12-01	26	(not set)	0	2021-12-02	2021-12-02	Cancelled					
Julianna	Higdon	2002-02-14	2021-12-04	2022-02-05	19	(not set)	64	2021-11-30	2021-11-30	Expired					
Alex	Hammond	1991-06-28	2021-12-04	2022-02-05	30	(not set)	64	2021-11-30	2021-11-30	Expired					
Leah	Kates	2002-09-21	2021-12-04	2022-02-05	19	(not set)	64	2021-11-30	2021-11-30	Expired					
James	Amarta	1994-01-12	2020-01-17	2020-04-16	26	(not set)	91	2020-01-16	2020-01-16	Expired					
Me	James	1988-12-25	2020-01-22	2020-01-22	31	(not set)	0	2019-11-07	2019-11-13	Cancelled					

Individual actions:

- View record
- Edit record
- Cancel record
- Access Documents
- Participant History

Participant View

Viewing Jim Smith - Premium Sample Plan Plan Inactive

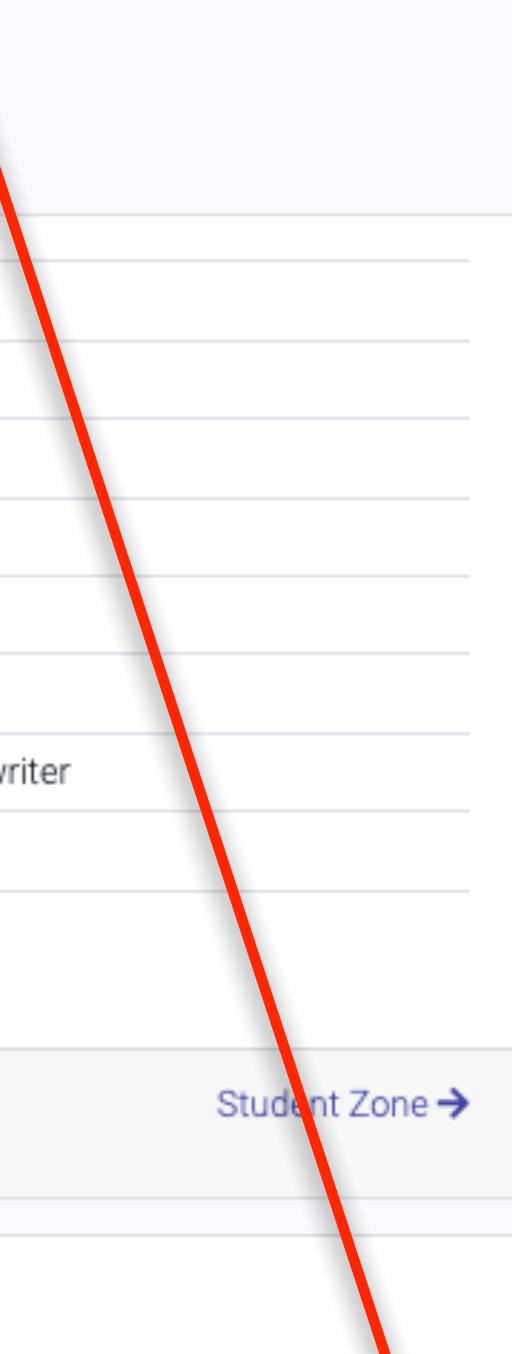
[Manage Participant](#) [Documents](#) [View History](#) [Back to Plan](#)

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 *	Email *	Address Line 1	Internal ID	US Citizen *	US Destination *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Middle Name	CC Email	Address Line 2	Note	Start Date *	End Date *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name *	To add multiple CC Emails, separate each email with a comma. (Ex: t1@test.com,t2@test.com)				
<input type="text"/>					
Home Country Name *	Telephone	City	Labels	Courtesy Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Gender *	Gender X	Postal Code	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.		
<input type="button" value="Choose"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/>			
Date of Birth *		Country Name	State Name		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

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

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.

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 *	Email *
Albert	test@internationalstudent.com
Middle Name	CC Email
D	
Last Name *	To add multiple CC Emails, separate each email with a comma. (Ex: t1@test.com,t2@test.com)
Smith	
Home Country Name *	Telephone
Argentina	555-5346
Gender *	Gender X
Male	<input type="radio"/> Yes <input checked="" type="radio"/> No
Date of Birth *	This participant is 33 years old.
1990-02-08	

Address Line 1	Internal ID
1237 Main St.	103
Address Line 2	Note
Box 30	sample notes
City	Please enter any internal notes or reference numbers you need for this participant
Anywhere	
Postal Code	Labels
12554	
Country Name	State Name
United States	Florida

US Citizen *	US Destination *
<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Start Date *	2023-08-01
End Date *	2024-07-30
Coverage is for 365 days.	
Courtesy Date	
2024-08-31	
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
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	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	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	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	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	2022-06-01	Expired
Erica	Chan	2003-12-01								
ANGELA	CABRALES CALLE	2000-01-01								
NICOLLE CAROLINA	CESPEDES VELIZ	2000-01-01								
CRISTINA	CHAMORRO CUBAS	1999-12-01								
Mirian	Fernandez Poma	1995-01-01								
Julianne	Higdon	2002-01-01								
Alex	Hammond	1991-01-01								

With Selected Rows: [Export to XLS](#) [Cancel](#) [Edit](#) [Bulk Labels](#) [Edit](#)

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

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

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

INTERNATIONAL STUDENT INSURANCE

Viewing Jane Smith - Premium Sample Plan Plan Inactive

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

Update Cancel Move

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	Actions
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	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	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	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	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	2022-06-01	Expired	
Erica	Chan	20									
ANGELA	CABRALES CALLE	20									
NICOLLE CAROLINA	CESPEDES VELIZ	20									
CRISTINA	CHAMORRO CUBAS	19									
Mirian	Fernandez Poma	19									
Julianne	Higdon	20									
Alex	Hammond	19									

Rows: 20

Showing 1-20 of 162 items.

INTERNATIONAL STUDENT INSURANCE

Viewing Jane Smith - Premium Sample Plan Plan Inactive

Manage Participant

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	

Student Zone →

With Selected Rows: [Export to XLS](#) [Cancel](#) [Edit](#) [Bulk Labels](#)

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

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

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	Actions
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)					
Jon	Smithson	2004-09-21	2023-01-01	2023-01-01	18	(not set)					
Edraz	Kuroda	1996-01-03	2021-01-20	2023-01-03	25	(not set)					
Erica	Chan	2003-12-02	2022-01-01	2022-01-19	18	(not set)					
ANGELA	CABRALES CALLE	2000-02-25	2021-12-14	2022-04-03	21	(not set)					
NICOLLE CAROLINA	CESPEDES VELIZ	2000-06-11	2021-12-02	2022-03-22	21	(not set)					
CRISTINA	CHAMORRO CUBAS	1999-11-15	2021-12-18	2022-04-18	22	(not set)					
Mirian	Fernandez Poma	1995-01-30	2021-12-01	2021-12-01	26	(not set)					
Julianna	Higdon	2002-02-14	2021-12-04	2022-02-05	19	(not set)					
Alex	Hammond	1991-06-28	2021-12-04	2022-02-05	30	(not set)					

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 Apple 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

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

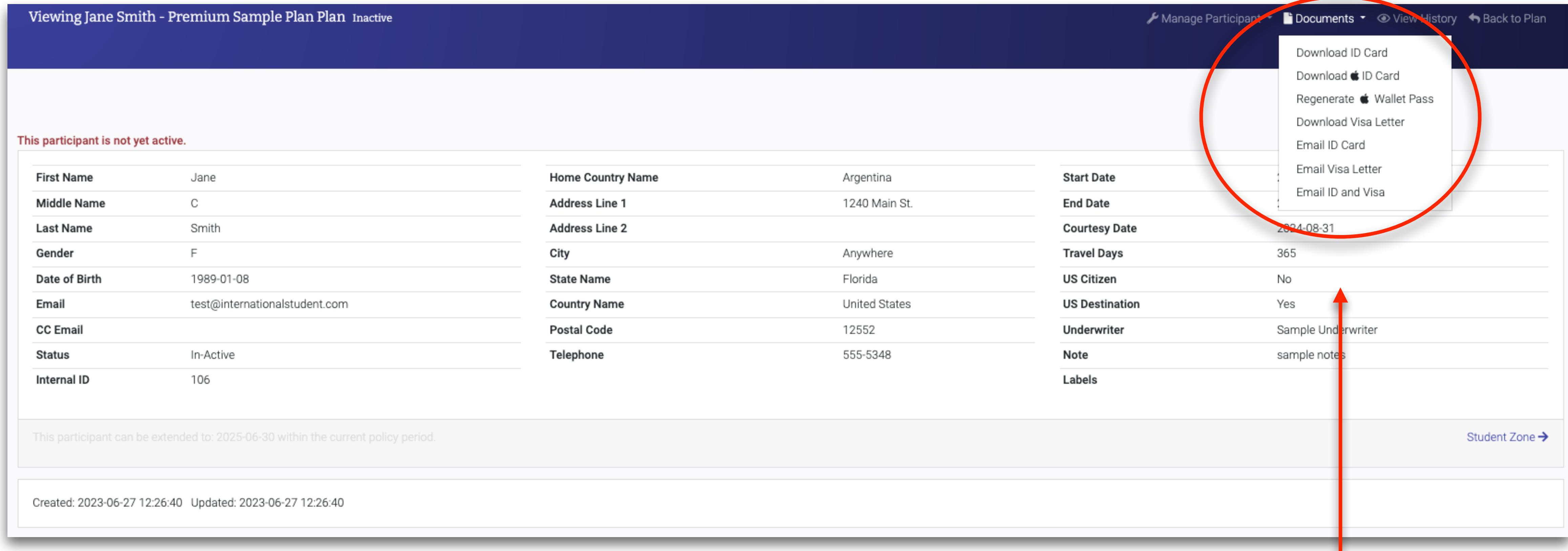
Home Country Name	Argentina
Address Line 1	1240 Main St.
Address Line 2	
City	Anywhere
State Name	Florida
Country Name	United States
Postal Code	12552
Telephone	555-5348

Start Date	
End Date	
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



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.

<input type="checkbox"/> First Name	Last Name	Date of Birth	Start Date	End Date	Age	Courtesy Date	Travel Days	Created	Updated	Status	Rows:				
										All	<input type="button" value="▼"/>				
<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					
<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					
<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					
<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	2022-01-01	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"/> Julianna	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					

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

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.



**INTERNATIONAL
STUDENT
INSURANCE**

Frequently Asked Questions

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 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 participant's 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

<http://www.InternationalStudentInsurance.com>

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