ARAG Client Service Center (CSC) - *How To*

ARAG

Legal Insurance

Once you have created your account, you will have access to the CSC, including these key areas:

Member Transactions – If applicable, view, add or edit a member's status or download a list of members.

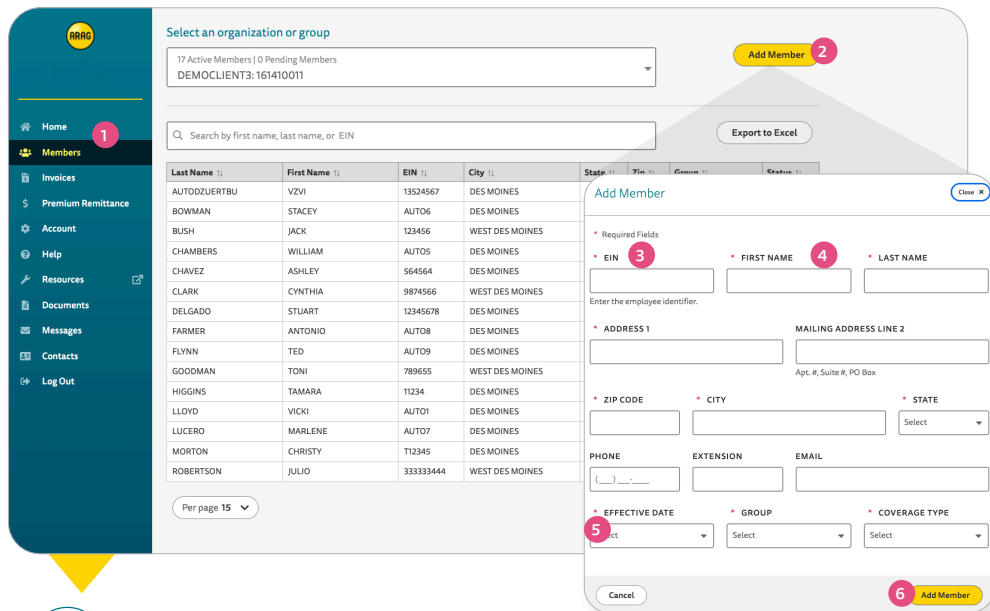**Secure Email** – Send confidential employee data to ARAG through this secure email tool.

Invoices – If applicable, view and print invoices and have access to the past 12 months online.

Plan Document(s) – Review plan documents such as a Certificate of Insurance.

Resources – Access helpful articles, videos and other tools in the Learning Center.

Member Transactions and Invoicing are available options depending on your account set up.

Sign in to your account ARAGlegal.com/clients to complete the following transactions:

- Add a Member
- Terminate/Suspend an Active Plan Member
- Find and/or Edit an Active Plan Member
- Retrieve a List of Active Plan Members
- Send a Secure Message and Attach Secure Documents
- Retrieve Invoices

TO ADD A MEMBER:

1. Click on "Member Admin" or click on "Members" in the side menu.
2. On the top right, click on Add Member.
3. Input the enrollment identifier (*full social security number or employee ID*). **Note:** If that member is in the database under that identifier, an error "EIN (or SSN) is in use" will appear. Click Cancel and contact Client Support for assistance.
4. Enter required member information.
5. Input the coverage Effective Date, Group, and Coverage Type if applicable.
6. A confirmation window will appear. Review the contact information, Group, Coverage Type and Effective Date to ensure it is correct.
7. Next, click on "Add Another Member" or "Done."

TO TERMINATE/SUSPEND AN ACTIVE PLAN MEMBER:

1. Click on "Member Admin" or click on "Members" in the side menu.
2. Search by First Name, Last Name or EIN/SSN to retrieve membership search results.
3. Click on the member's row to edit.
4. Click Terminate Membership.
5. Enter the Coverage Termination Date and Termination Reason.
6. Click Terminate Membership, confirmation window will appear.

TO FIND AND/OR EDIT AN ACTIVE PLAN MEMBER:

1. Click on "Member Admin" or click on "Members" in the side menu.
2. Search by First Name, Last Name or EIN/SSN to retrieve membership search results.
3. Click on the member's row to edit.
4. Click Edit Member.
5. Edit and click Save Changes.
6. A confirmation window will appear. *Review the information to ensure it is correct.*
7. Once the changes are made, click Done.

TO RETRIEVE A LIST OF ACTIVE PLAN MEMBERS:

1. Click on "Member Admin" or click on "Members" in the side menu.
2. Under "Select an organization or group" choose the group(s) you'd like in your list.
3. Click on Export to Excel.
4. Save the download.

TO SEND A SECURE MESSAGE AND ATTACH SECURE DOCUMENTS:

1. Click on Messages to send a secure message.
2. Select a Subject.
3. Type your message.
4. Add an attachment (*maximum of two attachments per message or 5 MB per file*).
5. Hit Send to complete the message.

TO RETRIEVE INVOICES

1. Click on Invoices.
2. Select the month and View Invoice.
3. Click on View Invoice.
4. Download or print.

If you have any questions or need assistance, please contact Client Support Services at 800-888-4184, ext. 605 (Monday - Friday, 8 am - 5 pm Central time) or email clientsupport@ARAGlegal.com.

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