



## **Group Benefits Handbook**

A guide to managing your LegalShield and IDShield employee benefits

# Group Benefits Handbook

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## About LegalShield

Founded in 1972 in Ada, Oklahoma, LegalShield is a leading provider of legal plans and identity-theft solutions to families and small businesses across the U.S. and Canada.

### What a LegalShield membership means to your employees:

- **PROPRIETARY NATIONWIDE NETWORK OF PROVIDER LAW FIRMS**  
LegalShield has developed a network of carefully selected, top-quality law firms. Each law firm is licensed in the state or province it services and is dedicated to LegalShield members.
- **SUPERIOR SERVICE**  
Our Provider Law Firms are paid in advance on a per capita basis, ensuring they are motivated to focus on providing good service to you, not on billing.
- **QUALITY ASSURANCE**  
Our proprietary system provides daily, real-time, online monitoring of our Provider Law Firms, which enables continuous improvement of quality service. Our Provider Law Firms consistently earn high ratings for customer service.
- **UNIQUE SERVICE**  
Our members only have to make one call to be connected with a lawyer, ensuring they know exactly who to call when a legal need arises.
- **LegalShield AND IDShield**  
Providing a comprehensive solution when ID theft issues turn into legal issues.
- **COMPREHENSIVE RESTORATION**  
With a Power of Attorney, Kroll will do everything necessary to restore your identity until all resolvable issues have been addressed.
- **MONITORING WHAT MATTERS**  
We monitor your identity from every angle, not just your Social Security number, credit cards and bank accounts.
- **SERVICE GUARANTEE**  
IDShield backs up its promise that it will do 'whatever it takes for as long as it takes' with a \$5 million service guarantee.

## Plan Administrator Q & A

### **How do our employees utilize their benefits?**

New members who provide a valid email address on their legal plan application will receive an electronic version of the LegalShield Member Guide and will receive their membership cards by mail. Employees enrolling in the legal plan without a valid email will get a Membership Guide and Membership Cards at their address shortly after enrolling. The guide includes a membership contract, Will preparation documents, and other information regarding use of their membership. The Provider Law Firm's telephone numbers will be listed on the membership cards. Members may call the Provider Attorney during regular business hours when assistance is needed. Identity theft plan members, can log in at [www.MyIDShield.com](http://www.MyIDShield.com) to review benefits and activate identity theft membership services. Membership cards will follow by mail. Note: Spanish members completing a spanish application will receive a printed version of the member guide.

### **How do I add a new employee to the plan?**

New employees that wish to enroll in the LegalShield or Identity Theft Plan must complete a membership application either on paper or electronically. (Retain the payroll deduction authorization for your records on paper applications). Applications(s) should be given to your LegalShield Group Servicing Agent to be mailed in to our corporate office for processing. If your company has opted for a web enrollment site that is developed and maintained by LegalShield, you may enroll employees through your LegalShield site. Or, if you prefer you may provide the link for the site directly to your employees so that they may enroll themselves. You will access the site using a link provided to you by LegalShield Corporate Office. For electronic enrollment information please contact Group Resources at [Elecenroll@LegalShieldCorp.com](mailto:Elecenroll@LegalShieldCorp.com).

### **Are LegalShield and identity Theft plans post-tax or pre-tax benefits?**

Our benefits are considered post-tax deductions.

### **How do I discontinue an enrollees benefit?**

If an enrollee has left employment or requests to cancel, you notate the change on your invoice by filling in the proper status code for the member. You may also send us an email to [groupbilling@legalshield.com](mailto:groupbilling@legalshield.com). Please notify us within the first month in which a member is no longer an active enrollee in the LegalShield benefit.

### **Is the benefit portable?**

Yes. We will contact any members when we are notified of the change in their status. A member will have the opportunity to continue their coverage at the group rate and may choose a payment method best suited to their needs.

### **What do I need to send in with our payment?**

Please return a reconciled copy of the invoice that balances with the amount being paid. If you have a printout of the payroll deductions that balances with your payment, send a copy to ensure correct application of that payment. Payments received that are not properly reconciled may delay processing. The most common form of payment is by check, however, other payment options are available.

### **What period does my invoice cover?**

LegalShield bills on a monthly basis for the current month. All memberships that were active at the time the invoice was generated will be listed on your invoice for that month.

### **What if an employee enrolls after I have already received my invoice for the current month?**

Once LegalShield receives that employee's application, we will process the application within 24-48 hours. If the employee is to be effective for the current month, they will appear on your next invoice twice. The first listing will be under the current month's amount due and the second listing will be under the "Members effective prior month(s) and did not appear on invoice noted" section.

### **What if an enrollee listed on my invoice is not to be paid?**


If an enrollee is not to be paid on your invoice, simply mark through the enrollee's amount due and update the status code. Once the update is processed, it will be reflected on your next invoice. The enrollee will be listed in the "Following Memberships have been removed since your last invoice" section of the invoice.

### **When should you call Member Services?**

- Need to update information - your address or phone number.
- Need to make a change in your payment method.
- Need to add or remove a family member from your coverage.
- Need a replacement contract or membership card.
- Need an additional Will Questionnaire.

If you have any questions about your membership policy, you can reach Member Services by calling 1-800-654-7757, emailing [MemberServices@legalshield.com](mailto:MemberServices@legalshield.com) or using the MyLegalShield smart phone app. Our phone lines are open Monday - Friday (except holidays), from 7 a.m. to 7 p.m., Central Time. Your Member Services Department is located in Ada, Oklahoma, at the LegalShield Home Office.

# Group Billing Statement



P.O. BOX 2629  
Ada, OK 74821-2629

\*\*\*\*\* INVOICE \*\*\*\*\*

PO# \_\_\_\_\_

**A** → Company Name  
Attn: Plan Administrator  
Address 1  
Address 2  
CITY, ST ZIP

Account Contact Information:  
Contact Name: Benefits Administrator  
Ph: XXX-XXX-XXXX Ext: XXXX  
Email Address: email@domainname.com

**B** → *Please return one copy of this invoice with status updates, contact info, address changes, and payment. Please make notations in blue or black ink only. No highlights please. If you are not paying for an employee listed on your invoice, please indicate reason in status column of the invoice. If changes are not reported within 60 days, the account will be considered correct.*

*For Billing Inquiries please contact our Group Billing Department. Phone: 1-800-972-9272 Fax: 580-310-6962 Email: groupbilling@legalshieldcorp.com*

**C** → Group#: 99999 Status Update Codes

COMPANY NAME	1-No Longer Employed	4-No Authorization
INVOICE DATE: 01/25/2015	2-Leave of Absence	5-Deceased
PAYMENT TERMS: DUE UPON RECEIPT	3-Member Request Cancel	6-Other (Explain)

**D** →

Membership#	Name	Current Due	Status
10111111111	A, EMPLOYEE	\$18.95	_____
10222222222	B, EMPLOYEE	\$18.95	_____
70111111111	B, EMPLOYEE	\$14.95	_____
70222222222	C, EMPLOYEE	\$18.95	_____
10333333333	D, EMPLOYEE	\$18.95	_____
<b>Sub Total:</b>			\$90.75

**E** →

**I** → Members effective prior month(s) and did not appear on invoice noted.

10333333333	D, EMPLOYEE	\$18.95	12/25/2014 Invoice
<b>Sub Total:</b>			\$18.95

**J** → The following Memberships have been removed since your last invoice.

10444444444	E, EMPLOYEE	Legal Plan
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**K** →

Previous Invoices:	Invoice Date:	Invoice Amount:	Paid Amount:	Processed Date:	Note:
12/25/2014	12/25/2014	\$90.75	\$90.75	01/05/2015	Any invoices without a processed date may be outstanding. If payment has already been submitted, please disregard this notice.
11/25/2014	11/25/2014	\$90.75	\$90.75	12/09/2014	
10/25/2014	10/25/2014	\$71.80	\$71.80	11/11/2014	

Current Total Due: \$109.70

\*\*\*\*\* By providing LegalShield with a check as payment you authorize us to use information on your check to make a one time electronic fund transfer for your account. Funds may be withdrawn the same day payment is received. Inquiries contact Group Billing 1-800-972-9272. \*\*\*\*\*

## A. ACCOUNT INFORMATION

Please update information as needed.

## B. COMMENT SECTION

Make any necessary corrections on your invoice and remit copy with payment.

## C. GROUP ACCOUNT INFO

Group account number, group name and invoice date.

## D. MEMBERSHIP DATA

Listing of your enrollees being billed for current month. IDT memberships are listed separate from Legal plans and are noted IDT next to the member number.

## E. CURRENT DUE

This is the amount due for each member. If the group is located in Canada, taxes will be listed.

## F. STATUS UPDATES

Please indicate a status for any employee that is not receiving payment or any employee with a status charge. For other (6), please explain.

## G. SUB TOTAL DUE

Subtotal for current months billed amount and subtotal for prior month due. These two amounts combine for the current total due.

## H. TOTAL DUE

Total of current month.

## I. PRIOR MONTH DUE

List enrollees that were effective for prior month(s) but application was not processed until after current month's invoice. Also list Total Due for this section. Add this to your current month due.

## J. REMOVED ENROLLEES

Listing of employees removed since your last invoice.

## K. INVOICE HISTORY

These are your three previous invoices, amounts and dates processed.

## Plan Benefits

The legal and identity theft plans provide employees with a number of benefits, all of which are listed in detail in the plan contract.

### Employees Can Call Their Provider Law Firm

**One of the most important and valuable benefits of the membership is the ability to talk with a lawyer about any personal legal issue employees might encounter.**

- Any personal legal matter
  - Phone call made on their behalf
  - Letter written on their behalf
  - Review a contract or legal document
  - Will prepared
  - Assistance with traffic citations
  - 24/7 emergency access for covered situations
  - 25% Preferred Member Discount
- ...and more!

Plan benefits differ in certain states and provinces. Please consult membership contract or brochure for more details and for benefit exclusions.

### Employees Have Identity Theft Experts on Their Side

**Identity theft is when someone uses your personal identifying information, like your name and Social Security Number, without your permission, to commit fraud or other crimes. It's one of the fastest growing crimes in North America today. The FTC estimates that as many as 9 million Americans fall victim to identity theft each year. A victim of identity theft could face any number of issues such as lost job opportunities, issues getting a loan, issues over unreported income, harassment from debt collectors, or even face arrest for crimes the identity thief committed.**

**Coverage that will help protect against, and resolve, identity theft issues:**

- Identity theft advisor
- Credit report review
- Consultation/Advice
- Credit monitoring
- Restoration Services
- Monday through Friday 7 am - 7 pm CT
- 24/7 emergency access for covered situations

### Where to Direct Employees Who Have Questions

Any employees who have additional questions may log onto [mylegalshield.com](http://mylegalshield.com) or [myidshield.com](http://myidshield.com) for further assistance.

## How To Use The LegalShield Membership

Members have access to a Provider Law Firm that helps with legal questions and problems.



## How To Use The IDShield Membership

It's easy. Simply follow these two steps:

1. Go to [www.myidshield.com](http://www.myidshield.com)
2. Log in as a new member
3. Download MyIDShield app

That's it. Once you have logged in, your account has been activated. If you have questions or need some assistance, don't worry. We're happy to help. Just call our member service department at 888-494-8519 any time from 7:00am - 7:00pm CT, Monday through Friday. With our MyIDShield app, members have access to their Identity Theft Advisor at the touch of a button. Download the free app from the App Store or Google Play.



### Administration is easy.

- No claim forms
- No deductible
- No time consuming administrative duties
- No late payment fees
- Once-a-month billing
- No cancellation forms

Administering your new LegalShield employee benefit is extremely easy. However, should you have any questions, please contact your LegalShield sales representative. If you have questions about billing, call 800.972.9272 or [groupbilling@legalshield.com](mailto:groupbilling@legalshield.com).

## Company Information

**Physical Address:** LegalShield  
One Pre-Paid Way  
Ada, OK 74820

**Tax ID:** 73-1016728

**Website:** www.legalshield.com  
www.idshield.com

## Group Billing Information

**Mailing Address:** LegalShield  
Attention: Group Billing  
P.O. Box 2629  
Ada, OK 74821

**Phone Number:** 1-800-972-9272 (7a.m. - 7p.m. CST)

**Fax Number:** 580-310-6962

**Email Address :** groupbilling@legalshield.com

## LegalShield Member Services Information

Your employees may contact our Member Services department with any questions regarding their Legal or Identity Theft benefits

- **United States Phone Number:** 800-654-7757 (7 a.m. - 7 p.m. CST)
- **Canadian Phone Number:** 800-440-8857 (7 a.m. - 7 p.m. CST)

**Email:** memberservices@legalshield.com

**Member Website:** mylegalshield.com and/or myidshield.com



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