



SPONSOR ADMINISTRATIVE GUIDE



Click on any item in the Table of Contents to go to that section in the document

Looking for something specific? To search for a word or term in this document, type in Ctrl + F (PC) or Command + F (Mac)

When you see '[Click Here](#)' throughout the guide, you will be able to go directly to the section referenced; to return to your previous cursor location, type in Alt + ← (left arrow) on a PC or Command + [(left bracket) on a Mac (or review your specific PDF software's shortcut options)

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Welcome/Getting Started with CISI

To Our Valued Sponsors,

Thank you for choosing Cultural Insurance Services International (CISI). We hope that this guide contains everything you need to ensure a successful relationship with us.

*When you partner with CISI, you are provided with access to a variety of tools and resources through our secure **myCISI** online portal. This guide outlines the available features and benefits, from enrolling participants in your policy to viewing emergency rosters and location-specific reports. Additionally, it provides you with information on the participant version of **myCISI** as well as helpful advice for travelers on how to handle both minor and major incidents while abroad.*

When situations become difficult or complex, this guide outlines the process of working through both medical and security-related situations and provides you with all relevant contact information for our in-house crisis management team as well as our 24-7 assistance partner.

To navigate through this guide:

- *Click on the desired item in the Table of Contents or search for a specific term by typing in Ctrl + F (PC) or Command + F (Mac) on your computer;*
- *When you see "[Click Here](#)" in the document, you can immediately go to that referenced section;*
- *Return to your previous cursor location by typing in Ctrl + ← (left arrow) on a PC or Command + [(left bracket) on a Mac (or review your specific PDF software's shortcut options)*

Page numbers have also been referenced if you choose to print this document instead.

Please do not hesitate to reach out to your account manager should you have difficulty finding the information you need. We are always happy to help!

Sincerely,

The CISI Team

myCISI Sponsor Overview and Initial Set-Up

The **myCISI** online portal allows sponsors to access a variety of information and features, including:

Enrollments

- Add individual enrollments
- Generate your policy template
- Send welcome email packages
- Manage itinerary, etc.

Search and Reporting Tools

- Access claim forms and policy brochure
- Generate enrollment rosters
- Invoice details; Search participants, invoices
- US and international provider search

Destination Information

- View any CDC issued health and vaccinations information
- Get destination profile
- Details on visa, exit/entry requirements

Invoicing

- Quickly search through invoices and perform varies activities with just a few clicks
- Send welcome package for invoices
- View/Print invoice details
- Make online payments
- Receive notifications on outstanding invoices

Travel Information

- View government-issued travel alerts and warnings
- Get information on US embassies around the world

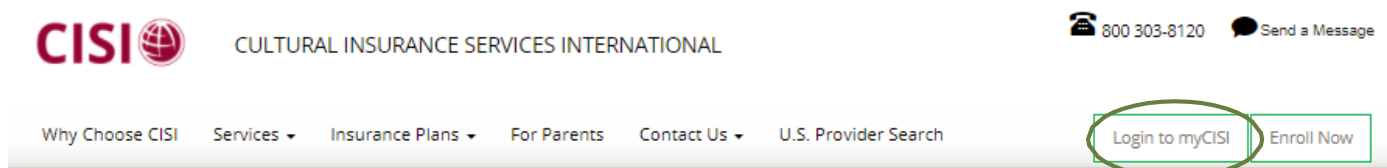
Other Resources


- Embassy listing; Useful links
- Personal Security Assistance
- Set subscription preferences for invoice changes, emergency alerts, and participant itinerary or check-in updates

Login to myCISI

Your new sponsor welcome email from CISI will include a username and password for **myCISI**. To login:

1. Go to www.mycisi.com
2. Click on the "Login to myCISI" button on the top right corner of the screen



3. On the new screen, select "I am a(n) Sponsor" from the drop-down menu
4. Type in the username and password assigned to you (NOTE: You can always change your password later)
5. Click on the green "Log In" button 

NOTE: If you did not receive a username/password or experience any issues logging into the portal, please contact Kathleen Connors by phone at 203-399-5509 or via email at enrollments@mycisi.com.

Set up your myCISI Account Information

After initially logging into **myCISI**, please set up your account to ensure that CISI has the correct information for billing/invoice issues as well as emergency situations. Under the 'Account Information' tab, please click "Add" next to each Contact Type you wish to add:

Contact Type	First Name	Last Name	
BILLING			Add...
SECOND BILLING			Add...
DIRECTOR			Add...
MAILING			Add...
RISK MANAGER			Add...
EMERGENCY			Add...
INVOICE COORDINATOR			Add...
EMERGENCY SECONDARY			Add...
EMERGENCY TERTIARY			Add...
ASSISTANT DIRECTOR			Add...

Click this button next to each Contact Type to add contact info

Sign up for Subscriptions


After setting up your account information, you can sign up for various subscriptions. Ensure you—or any others you designate—are automatically notified on the status of invoices, changes to participant itineraries, and emergency situations.

Subscription Options/Descriptions:

Emergency Roster Enclosed	Receive a list of participants in the area where the alert is coming from.
Emergency Alert Notification	Receive notifications when an event occurs abroad, even when there are no participants in the reported area.
Invoice Closed Notification	When an invoice is closed by anyone enrolling, you will receive this notification.
Invoice Closed Notification_SE	If participants are enrolling with a sponsor code ending in SE, you will receive this notification.
Past Due Notifications	This is sent for past-due invoices every 45 and 90 days.
Weekly Invoice Notification	Receive invoice notifications on a weekly basis.
Monthly Invoice Notification	Receive invoice notifications on a monthly basis.
Quarterly Notifications	Receive invoice notifications on a quarterly basis.
Participant Itinerary Changes	When participants make any adjustments or additions to their itinerary information, you will receive a notification.
Enrollments with itinerary Information Notification	Receive a notification when an invoice has a change in itinerary information.
Participant Check In Notification	Receive a notification when participants check in after a security situation abroad.

To sign up for subscriptions:

- 1. Select 'SUBSCRIPTIONS' from the left-side menu
 - 2. Click on 'SUBSCRIBE' on the right column and the list of contacts from 'Account Information' will appear
- NOTE: If any of the contacts need to be updated, please click on 'Account Information' and Edit.*




Cultural Insurance
Services International

[Home](#) [Resources and Links](#)

Log Out

UJ: UNIVERSITY OF JOY



Account Information

Subscriptions

Participant Search

Add Enrollments

Enrollment Roster

Emergency Roster

Subscriptions

Code	Description	
EMERGENCY_ROSTER_ENCLOSED	EMERGENCY ROSTER ENCLOSED	Subscribe..
EMERGENCY_ALERT_NOTIFICATION	EMERGENCY ALERT NOTIFICATION	Subscribe..
CISI_INVOICE_CLOSED_NOTIFICATION	CISI INVOICE CLOSED NOTIFICATION	Subscribe..
CISI_INVOICE_CLOSED_NOTIFICATION_SE	CISI INVOICE CLOSED NOTIFICATION SE	Subscribe..
CISI_PAST_DUE_NOTIFICATION	CISI PAST DUE NOTIFICATION	Subscribe..
CISI_WEEKLY_INVOICE_NOTIFICATION	CISI WEEKLY INVOICE NOTIFICATION	Subscribe..
CISI_MONTHLY_INVOICE_NOTIFICATION	CISI MONTHLY INVOICE NOTIFICATION	Subscribe..
CISI_PARTICIPANT_ITINERARY_CHANGES_NOTIFICATION	CISI PARTICIPANT ITINERARY CHANGES NOTIFICATION	Subscribe..
CISI_ENROLLMENTS_WITH_ITINERARY_INFO_NOTIFICATION	CISI ENROLLMENTS WITH ITINERARY INFORMATION NOTIFICATION	Subscribe..
CISI_PARTICIPANT_CHECKIN_NOTIFICATION	CISI PARTICIPANT CHECKIN NOTIFICATION	Subscribe..
CISI_QUARTERLY_INVOICE_NOTIFICATION	CISI QUARTERLY CLOSED NOTIFICATION	Subscribe..

- 3. Click on 'SUBSCRIBE' to elect to receive the selected notification (click it again to have someone 'UNSUBSCRIBE' so they do not receive the notifications)

Contacts

Contact Type	First Name	Last Name	
BILLING	ANNA	SMITH	Subscribe
SECOND BILLING			Subscribe
DIRECTOR			Subscribe
MAILING			Subscribe
OFFICE ADMINISTRATOR			Subscribe
RISK MANAGER			Subscribe
EMERGENCY			Subscribe
INVOICE COORDINATOR			Subscribe
EMERGENCY SECONDARY			Subscribe
EMERGENCY TERTIARY			Subscribe
ASSISTANT DIRECTOR			Subscribe

Close

Enroll New Participants

After clicking on the “Add Enrollments” tab, you can enroll your NEW participants using one of the following methods:

Using the CISI import template

(This is the best method for enrolling a group of students at once; see [page 9](#) or [Click Here](#))

OR

Manually entering enrollment data

(This is ideal if you only need to enroll one or two participants; see [page 12](#) or [Click Here](#))

[Click Here](#) or go to [page 10](#) for detailed instructions on completing the template

[Click Here](#) or go to [page 13](#) for information on cancelling or making changes to an existing enrollment



Attention Terra Dotta users: If you utilize Terra Dotta’s integration tools, please contact Kathleen Connors at 203-399-5509 or via email at enrollments@mycisi.com for assistance.

CISI
Cultural Insurance
Services International

Home Resources and Links Log Out

WJ: UNIVERSITY OF JOY

Welcome to CISI Client Portal

Account Information

Subscriptions

Participant Search

Add Enrollments

Enrollment Roster

Emergency Roster

Outstanding Invoices

Enrollments

- Add individual enrollments
- Generate your policy specific import templates
- Upload enrollment templates
- Send welcome email packages
- Manage itinerary etc.

Search & Reporting tools

- Access claim forms and policy brochure
- Generate enrollment rosters
- Invoice details; Search participants, invoices
- US and international provider search

Destination information

- View any CDC issued health and vaccinations information
- Get destination profile
- Details on visa, exit/entry requirements

Invoicing

- Quickly search through invoices and perform various activities with just a few clicks
- Send welcome package for invoices
- View/print invoice details
- Make online payments
- Receive notifications on outstanding invoices

Travel information

- View travel alerts and warning issued by the state government
- Get information on US embassies around the world

Other resources

- Embassy listing; Useful links

Method 1: Enroll Participants with the CISI Import Template

1. Select '**GENERATE TEMPLATE**'

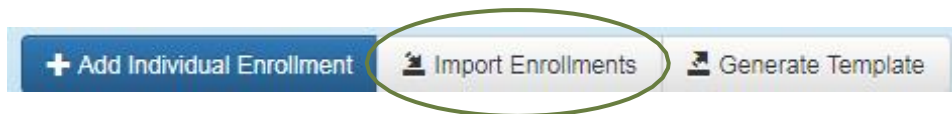


2. Complete Template and Save to your computer
[Click Here](#) or go to page 10 for information on completing the import template.

3. Click on '**CREATE INVOICE**'



4. Click on '**IMPORT ENROLLMENTS**'



NOTE: If errors are generated, please double check to make sure the template was completed correctly ([Click Here](#) or go to page 10 for information on completing the import template). If you still need assistance please email enrollments@mycisi.com or call Kathleen Connors at 203-399-5509.

5. Once you see your list of enrollments, click on '**CLOSE INVOICE**'
6. Prompts you to a '**PAY NOW OR LATER**' screen – select which one
NOTE: If you are submitting payment by check, please use the address on the bottom of the '**Invoice Cover Letter**'.
7. On the next screen, you can then send a welcome package to participants or print, save and/or send invoice related documents
 - ▶ [Click Here](#) or go to page 18 to learn more about the '**SEND WELCOME PACKAGE**' feature
 - ▶ [Click Here](#) or go to page 15 to learn more about available **INVOICE** information

How to Complete the CISI Import Template

NOTE: All mandatory fields must be completed to avoid errors

1. Sponsor Code (MANDATORY FIELD)

If not already populated, please enter in your Sponsor Code.

NOTE: If you do not know your sponsor code, please contact enrollments@mycisi.com or call 203-399-5509.

2. Policy Number (MANDATORY FIELD)

NOTE: Please make sure the Policy Number is correct and has the correct year listed. If you are using a template you already saved on your computer, you may have an older version of the template. To verify a Policy Number, you can go to 'Add Enrollments' screen and see the coverage dates for each policy number. (Example: 17 STB... or 17 GLM N...) The Coverage Start Date must be within the effective date.

3. Transaction Type (MANDATORY FIELD)

If not already populated, please select **NEW** for new enrollees.

Transaction Type	Last
NEW	
NEW	
EXT	
ERN	
ERT	
CAN	
REN	
COR	

4. Name - Last, First (MANDATORY FIELDS)

Use full names, not nicknames.

5. Gender (MANDATORY FIELD)

Use "F" for Female, "M" for Male, and "U" for Unknown as specified below.

NOTE: An error will be generated if Female, Male, Unknown is input instead.

Gender	Birthdate
F	
M	
F	
U	

6. Birthdate (MANDATORY FIELD)

Use the MM/DD/YYYY format. Please make sure that the correct birthdate is provided.

7. Start Date (MANDATORY FIELD)

Use the MM/DD/YYYY format. This is when the participant's coverage begins.

NOTE: The Coverage Start Date must be within the effective dates of the corresponding policy.

8. End Date (MANDATORY FIELD)

Use the MM/DD/YYYY format. This is when the participant's coverage ends.

NOTE: The Coverage End Date cannot exceed 12 months from Coverage Start Date.

9. Enrollment Cell Code (MANDATORY FIELD)

Select the rate that applies.

NOTE: DO NOT leave blank – This calculates the cost.

Example:

Enrollment Cell Code	Insurance
B (MONTHLY-PARTICIPANT ONLY)	EL
A (WEEKLY UP TO 3 WKS-PARTIC	EL
	MF

10. Insurance Type (MANDATORY FIELD)

If this is not already populated with 'MED', please input.

Insurance_Type
MED

11. Country of Origin (MANDATORY FIELD)

2-letter Country Codes or Country Name

Example: Use 'US' or 'United States', not 'USA'

NOTE: Options should be available via a drop-down list;
Sheet 2 on the template also provides the correct spelling
and the 2-letter codes for reference.

12. Country of Destination (MANDATORY FIELD)

2-letter Country Codes or Country Name

Example: Use 'US' or 'United States', not 'USA'

NOTE: Options should be available via a drop-down list;
Sheet 2 on the template also provides the correct spelling
And the 2-letter codes for reference.

13. Destination City Name (MANDATORY FIELD)

Text field

14. Sponsor_Prog_Name (OPTIONAL FIELD)

Optional field for program-specific names

Example: 'Summer Architecture in Rome'

15. Sponsor_Participant_ID (OPTIONAL FIELD)

Optional field for sponsor-assigned participant ID numbers (such as a student ID number)

16. Email Address (MANDATORY FIELD)

This should be the email address of the participant. Without an email address, CISI will be unable to contact the participant and he/she will not be able to receive a CISI welcome email upon enrollment. The welcome email comes from 'CISI Enrollments' with 'CISI Materials' as the subject. Welcome emails include the following:

- Participant ID Card
- Consulate Letter
- Brochure
- Claim Form
- Information on how-to create a myCISI log in
- myCISI Student App information (this app is for all participants, not just students)
- Other useful links and resources

NOTE: Make sure there are no typos with @, no periods (.) at the end of the address and no additional characters are included, such as ';' – this will generate an error and/or the participant will not receive their necessary insurance materials. Please put your own email address in the field if you would like materials sent to you.

[Click Here](#) or go to [page 18](#) to learn more about the 'SEND WELCOME PACKAGE' feature.

17. Phone Number (OPTIONAL FIELD)

A phone number is helpful in case we need to contact the participant.



HELPFUL HINT

Are your participants traveling to multiple destinations?

If a program will be taking place in multiple countries, the 'Country of Destination' field should list the country where the participant first travels to or will be spending the most time in.

You can list all cities (regardless of country) within the 'Destination City Name' field separated by a comma (,).

Please have all participants traveling to multiple destinations download the myCISI student app or login to the myCISI participant portal and have them input travel details into the 'My Itinerary' section of the site. If a security evacuation is triggered or a natural disaster occurs, those participants will appear on the roster CISI pulls for that region.

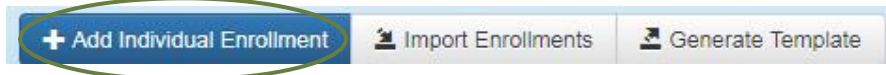
[Click Here](#) or go to [page 33](#) to learn more about the 'My Itinerary' feature.

Method 2: Manually Enter Enrollments

1. Click on **'CREATE INVOICE'**



2. Click on **'ADD INDIVIDUAL ENROLLMENT'**



3. Enter in all the fields

If you do not have a program name or sponsor participant ID, you can leave these fields blank.

4. Once completed, click on **'+ ADD ENROLLMENTS'**

- ▶ If you are only enrolling one person, on the next screen - You can click on **'CLOSE INVOICE'**
- ▶ If you are enrolling more than one person, click on **'+ ADD ENROLLMENTS'** again until you add all participants you wish to enroll, then **'CLOSE INVOICE'**

A screenshot of a web form titled 'Add Enrollment'. The form is divided into two columns. The left column contains fields for: First Name, Gender (a dropdown menu with 'Please Select One'), Origin Country (a dropdown menu with 'Please Select One'), Destination City, Start Date (with a date picker icon), Program Name, Email Address, Coverage Type (a dropdown menu with 'Enrollment Cell' and 'DAILY-PARTICIPANT ONLY-D-99'), a 'Reset Form' button, and a 'Cancel' button. The right column contains fields for: Last Name, Date of Birth (with a date picker icon), Destination Country (a dropdown menu with 'Please Select One'), End Date (with a date picker icon), Sponsor Partic Id, Phone Number, Insurance Type (a dropdown menu with 'Reporting Cell' and 'MEDICAL'), and a blue button with a white plus icon and the text '+ Add Enrollment'. This button is circled with a green oval.

5. Prompts you to a **'PAY NOW OR LATER'** screen – select which one

*If you are submitting payment by check, please use the address on the bottom of the **'Invoice Cover Letter'***

6. On the next screen, you can then **send a welcome package** to participants or **print, save and/or send invoice** related documents.
 - ▶ [Click Here](#) or go to [page 18](#) to learn more about the **'SEND WELCOME PACKAGE'** feature
 - ▶ [Click Here](#) or go to [page 15](#) to learn more about available **INVOICE** information

Dependent and Self-Enrollment Information (if Applicable)

If applicable to your group, the Self-Enrollment Form and/or Dependent Enrollment Form can be found under the "Policy Materials" tab. These forms contain policy-specific instructions and links that your participants can use to enroll themselves or dependents into the insurance plan.

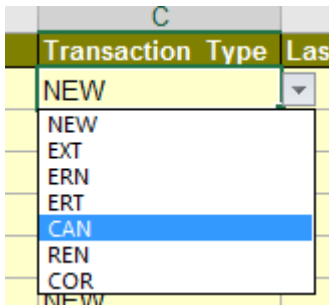
Change or Cancel Enrollments

****ALL ENROLLMENT CHANGES/CORRECTIONS MUST BE SUBMITTED TO [ENROLLMENTS@MYCISI.COM](mailto:enrollments@mycisi.com) TO ENSURE CORRECT PREMIUM IS APPLIED AND/OR REFUNDED. DO NOT UPLOAD THE CHANGES THROUGH THE PORTAL.**

Date Corrections

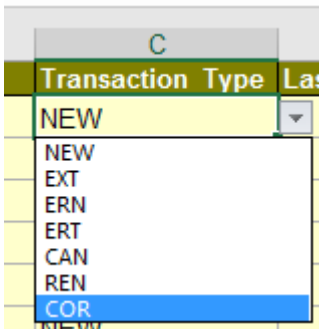
To make date changes, complete the import template as indicated below and then submit it as an attachment to enrollments@mycisi.com.

1. Cancel out the Participant's Old Coverage Dates



A screenshot of a dropdown menu for the 'Transaction Type' field. The menu is open, showing a list of options: NEW, EXT, ERN, ERT, CAN, REN, COR, and INF-W. The 'CAN' option is highlighted in blue, indicating it is the selected choice.

2. On the next line, you can copy and paste the top line, and then just change the Transaction Type to **Correction 'COR'**:



A screenshot of a dropdown menu for the 'Transaction Type' field. The menu is open, showing a list of options: NEW, EXT, ERN, ERT, CAN, REN, COR, and INF-W. The 'COR' option is highlighted in blue, indicating it is the selected choice.

3. Then, enter in the Participant's Correct Start and End Date

Example:

Transaction_Type	Last Name	First Name	Gender	Birth Date	Start Date	End Date	Enrollm
CAN	SMITH	JOHN	M	3/21/1995	5/22/2017	6/8/2017	D (DAIL
COR	SMITH	JOHN	M	3/21/1995	5/15/2017	6/2/2017	D (DAIL

Cancellations

If you need to cancel multiple enrollments, please submit them on the template using Transaction Type '**CAN**' (as indicated below) and send as an attachment to enrollments@mycisi.com.

Transaction_Type	Last_Name	First_Name	Gender	Birth_Date	Start_Date	End_Date	Enrollm
CAN	SMITH	JOHN	M	3/21/1995	5/22/2017	6/8/2017	D (DAIL

For just one or two enrollments, you can send an email to enrollments@mycisi.com with the Participant's name and date of birth in the body of the email.

Early Returns

If a participant is abroad and decides to return home earlier than initially scheduled, you can email enrollments@mycisi.com with the participant's name, date of birth, and the updated date of return.

NOTE: *If any requested change will result in a negative balance, please indicate in the email whether you would like the credit to be applied to a specific invoice, refunded via check or credit card (depending on which was used to purchase the initial insurance), or to leave the credit on file to apply to a future invoice.*

Invoice Information

Pay Closed Invoices

You will have an opportunity to pay invoices immediately after uploading your enrollment template through the portal. If you choose to pay an invoice later instead, you can go back to previously closed invoices and pay online with a credit card. You will also be able to print/view invoice details and submit them with a check or send payments via wire transfer.

- Select **'CLOSED INVOICE SEARCH'** from the left-side menu



- Select the correct **Policy Number** and check the box to **'SHOW ONLY UNPAID INVOICES'**

A screenshot of the invoice search form. It includes a 'Policy Number' dropdown menu with '17 GLM N10892880R' selected. Below it are input fields for 'Invoice from' (mm/dd/yyyy), 'Invoice to' (mm/dd/yyyy), 'Invoice number', and 'PO Number'. Each of these four input fields has a calendar icon to its right. At the bottom left, there is a checkbox labeled 'Show Only Unpaid Invoices' which is checked and circled in green. At the bottom right, there is a green 'Search' button with a magnifying glass icon. At the bottom left, there is a 'Reset Form' button.

- ▶ Input invoice date ranges, an invoice number (if known) or leave those fields blank and click **'SEARCH'**
- ▶ Select the Invoice you would like to pay and then:

To Pay via Credit Card...

- ▶ Go to **'PAY NOW'** and follow the prompts

Total invoices: 3								
Select	Invoice	Sponsor	Invoice Date ↓	Invoice Amount	Payment	Balance Due		
<input checked="" type="radio"/>	264073	UJ	10/13/2017	\$95.50	\$0.00	\$95.50	View	Pay Now
<input type="radio"/>	263980	UJ	10/12/2017	\$19.10	\$0.00	\$19.10	View	Pay Now
<input type="radio"/>	263978	UJ	10/12/2017	\$324.70	\$0.00	\$324.70	View	Pay Now

To Pay via Check...

- ▶ Go to the right side **'PRINT/VIEW/EMAIL REPORTS'** section
- ▶ You have options to *print and/or email the invoice information*: Check off **'Invoice Cover Letter'** and **'Invoice Details'** and then print or send it to a specific person

Print | View | Email reports

Select all reports | Clear all

Email ? View/Print

☒ Invoice Details

☐ Invoice Details [Excel]

☒ Invoice Cover Letter

☐ Invoice Consulate Letter

☐ Invoice ID Cards

Email

To Pay via Wire Transfer...

- ▶ Contact Kathleen Connors at 1-203-399-5509 or email enrollments@mycisi.com for information on setting up wire transfer payments.

Search for Outstanding Invoices

You can search for invoices by either clicking on **'CLOSED INVOICE SEARCH'** (as described above) or **'OUTSTANDING INVOICES'**. While both options will allow you to see invoices, searching for outstanding invoices will only bring up unpaid invoices that are considered past-due (more than 60 days old) unless otherwise indicated.

To search for an **outstanding invoice**:

1. Select **'OUTSTANDING INVOICES'** from the left-side menu



Welcome to CISI Client Portal

Enrollments

- Add individual enrollments
- Generate your policy specific import templates
- Upload enrollment templates
- Send welcome email packages
- Manage itinerary etc.

Search & Reporting tools

- Access claim forms and policy brochure
- Generate enrollment rosters
- Invoice details; Search participants, invoices
- US and international provider search

Destination information

- View any CDC issued health and vaccinations information
- Get destination profile
- Details on visa, exit/entry requirements

Invoicing

- Quickly search through invoices and perform various activities with just a few clicks
- Send welcome package for invoices
- View/print invoice details
- Make online payments
- Receive notifications on outstanding invoices

Travel information

- View travel alerts and warning issued by the state government
- Get information on US embassies around the world

Other resources

- Embassy listing; Useful links

Account Information

Subscriptions

Participant Search

Add Enrollments

Enrollment Roster

Emergency Roster

Outstanding Invoices

Closed Invoice Search

2. Search for invoices by date range, invoice number, or PO number
NOTE: If you do not have this information handy, you can leave blank.
3. Check the boxes to **"Include outstanding invoices less than 60 days old"** and/or to **"Exclude invoice(s) with credit amount"** if desired
4. Click **'SEARCH'** to view the invoice(s) and/or **"Pay Now"** with a credit card

Search outstanding invoices

Invoice from mm/dd/yyyy

Invoice to mm/dd/yyyy

Invoice number

PO Number

☒ Include outstanding invoices less than 60 days old?

☒ Exclude invoice(s) with credit amount

Reset Form

Search

Total invoices: 1

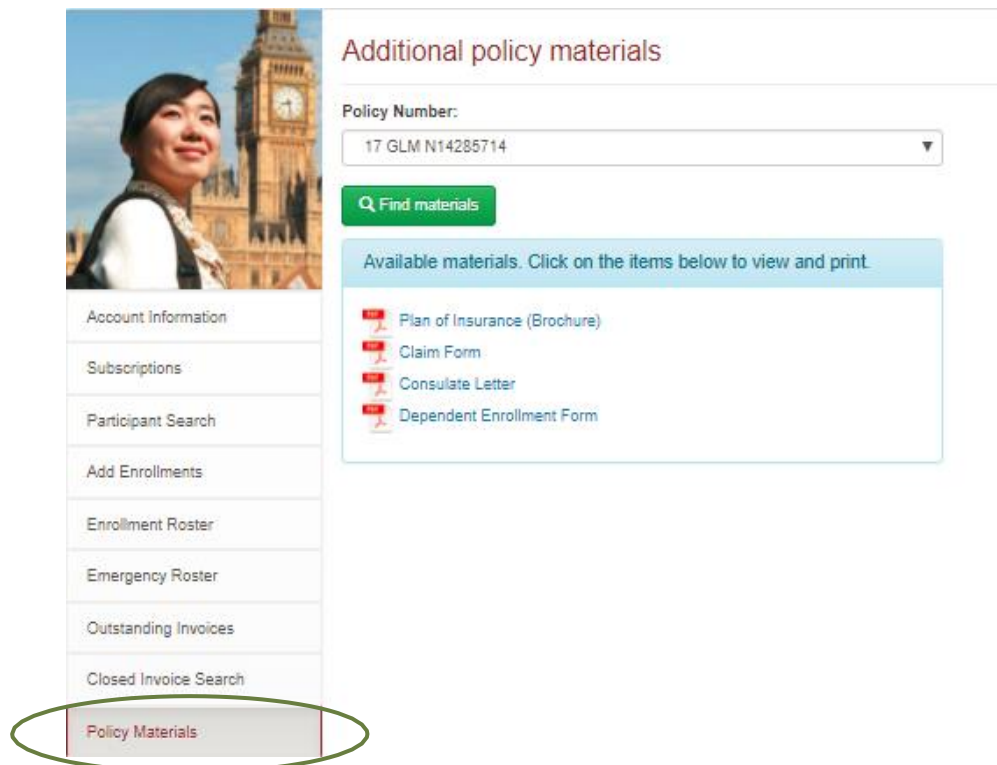
Invoice	Sponsor	Invoice Date ↓	Invoice Amount	Payment	Balance Due		
264000	UJ	1/13/2017	\$955.50	\$0.00	\$955.50	View	Pay Now

Administrative, Search, and Reporting Tools

Policy Brochure, Claim Form, and Additional Documents

For instant access to the policy brochure, claim form, or additional sponsor-specific documents (such as the Self-Enrollment or Dependent Enrollment Form, if applicable):

1. Click on '**POLICY MATERIALS**' on the left-side menu
2. Select the appropriate **Policy Number** from the drop-down menu
3. Click on the green '**FIND MATERIALS**' button



Send Welcome Packages to Participants

Upon closing an invoice (or at any time thereafter), you will have an opportunity to send all participants on a specific invoice an email '**Welcome Package**' which will come from enrollments@mycisi.com with '**CISI Insurance Materials**' in the subject line. The Welcome Package includes the following:

- Participant ID Card
- Consulate Letter
- Brochure
- Claim Form
- Information on logging on to **myCISI**
- **myCISI** Student App information
(this app is for all participants, not just students)
- Other useful links and resources

To send your participants the **Welcome Package**:

1. Go to '**CLOSED INVOICE SEARCH**' on the left-side menu and find/select the desired invoice

Total invoices: 3

Select	Invoice	Sponsor	Invoice Date ↓	Invoice Amount	Payment	Balance Due		
<input type="radio"/>	264073	UJ	10/13/2017	\$95.50	\$0.00	\$95.50	View	Pay Now

2. On the right-side of the screen, you will see a "**View reports and send emails**" box; Click on the red '**SEND WELCOME PACKAGE**' button

[View reports and send emails](#)

Please click below if you would like to send welcome email packages to **all** participants in the selected invoice.

☐ **Send Welcome Package**

[Print](#) | [View](#) | [Email reports](#)

[Select all reports](#) | [Clear all](#)

Email ?	View/Print
<input type="checkbox"/>	Invoice Details
<input type="checkbox"/>	Invoice Details [Excel]
<input type="checkbox"/>	Invoice Cover Letter
<input type="checkbox"/>	Invoice Consulate Letter
<input type="checkbox"/>	Invoice ID Cards

Email [Send](#)

HELPFUL HINT

Do you need copies of all consulate letters or ID cards for an invoice?

If you or specific trip leaders would like a copy of all insurance ID cards or consulate letters, you can follow the steps above but instead of clicking on the 'Send Welcome Package' button, check the box next to 'Invoice Consulate Letter' and/or 'Invoice ID Cards', enter in an email address, and hit the 'Send' button.


You can also click on the document names and view/print/save copies on your computer for distribution.

Use the Participant Search Feature/Resend Materials

Do you need to look up trip details, resend the Welcome Package, or obtain an insurance ID Card and/or consulate letter for a specific participant? The '**Participant Search**' feature allows you to search by name, destination, and/or travel dates. To use this feature:

1. Go to '**PARTICIPANT SEARCH**' on the left-side menu
2. Enter in your search terms
NOTE: To search by name, you may simply type in the last name. To narrow down the search, you may use first name and date of birth.
3. Click '**SEARCH**'

[Search](#)



[Account Information](#)

[Participant Search](#)

[Add Enrollments](#)

4. Check off the box next to the participant's name and scroll down
5. Under the **'Print/View/Email Reports'** section, you can then either resend the full Welcome Package to the selected participant (click on the red **'SEND WELCOME PACKAGE'** button) or select the desired document(s), enter in the participant's email address, and hit **'SEND'**

NOTE: You can also email documents to yourself/another person or just View/Print or save the desired document(s) onto your desktop for later distribution.

Filter
Total enrollments: 2

	Last Name	First Name	Participant Id	Dob	Gender	Email	Start Date	End Date	Origin Country	Dest. Country	Total Billed	Invoice Id
<input checked="" type="checkbox"/>	SMITH	JESSICA	1133333	11/27/1991	F	J.SMITH@UJ.EDU	05/29/13	06/29/13	US	ZA	\$39.68	111341
<input type="checkbox"/>	SMITH	JESSICA	1695971	4/12/1991	F	J.SMITH2@UJ.EDU	05/20/16	06/05/16	US	ZA	\$20.48	222341

Search participants

First name

Gender

Country of origin

Coverage start date from mm/dd/yyyy

Coverage end date from mm/dd/yyyy

Program Name

Last name

Date of birth mm/dd/yyyy

Country of destination

Coverage start date thru mm/dd/yyyy

Coverage end date thru mm/dd/yyyy

Sponsor Partic Id

☐ Only show current enrollees as of:
 ☐ Also search dependents

Reset Form
Search

Print | View | Email reports

Please click below if you would like to send welcome email packages to selected participants.

Send Welcome Package

Email ?	View/Print
<input checked="" type="checkbox"/>	ID card
<input checked="" type="checkbox"/>	Consulate letter

Email selected report(s) to

Send

Manage Itineraries on Behalf of Travelers


Whether traveling abroad on a multi-destination program or just taking off to another destination for the weekend, CISI can more accurately pinpoint the location of your participants during emergencies when the **'My Itinerary'** section of the myCISI participant portal is utilized. For this reason, we highly encourage all participants to use this feature. If this is not possible, you are able to manage itineraries on behalf of travelers.

To view or add a traveler's itinerary:

1. Go to **'PARTICIPANT SEARCH'** on the left-side menu
2. Enter in the participant's name and click **'SEARCH'**

3. Click on the number in the **'PARTICIPANT ID'** field

4. A box will pop up – Click on **'MANAGE ITINERARY'**

 Filter

Total enrollments: 1

Last Name	First Name ↑	Participant Id	Dob	Gender	Email	Start Date	End Date	Origin Country	Dest. Country	Total Billed	Invoice Id
SMITH	JOHN	1234567	Manage Itinerary			12/01/17	03/08/18	US	IT	\$100.00	000000

5. Click on the blue **'ADD DESTINATION'** button

Itinerary details:

Add destination

6. Enter in all fields and then click **'SAVE'**

All fields with an asterisk () are required.*

Itinerary details

Destination

Destination country *

City *

From date *

To date *

Contact information

Please provide the following if different from your primary contacts

Cell

Email

Note

Save

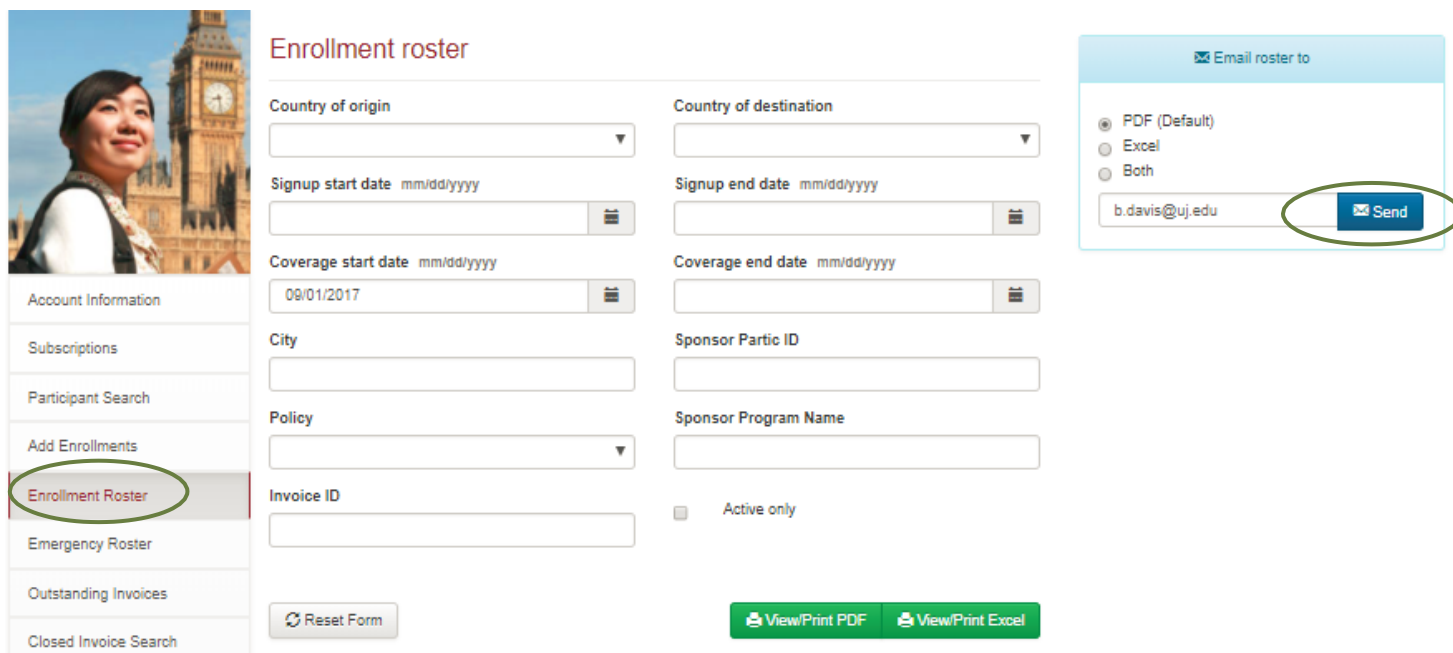
Cancel

powered by Google

Review Enrollment Rosters

The **'Enrollment Roster'** feature allows you to pull reports based on your specified criteria. You can then View/Print the reports in PDF or Excel or email them to yourself/others. These reports are useful for internal reporting of total or program-specific enrollment numbers, most popular destinations, etc. When pulling Excel reports, you can manipulate cells as needed to ensure you are sharing only what is relevant. To pull an enrollment roster:

1. Go to **'ENROLLMENT ROSTER'** on the left-side menu
2. Enter desired search criteria (country of origin or destination, signup dates, coverage dates, program name, etc.) and then click **'VIEW/PRINT PDF'** or **'VIEW/PRINT EXCEL'** – you can also email a PDF, Excel, or both to yourself/others by selecting and clicking on the blue **'SEND'** button



The screenshot shows the 'Enrollment roster' form and an 'Email roster to' modal. The form includes fields for Country of origin, Country of destination, Signup start/end dates, Coverage start/end dates, City, Sponsor Partic ID, Policy, Sponsor Program Name, Invoice ID, and an 'Active only' checkbox. A 'Reset Form' button is at the bottom left. On the left sidebar, 'Enrollment Roster' is highlighted. The 'Email roster to' modal shows options for PDF (Default), Excel, or Both, with the email address 'b.davis@uj.edu' and a 'Send' button circled in green.

Review Emergency Rosters/Safety Check-In Details

The **'Emergency Roster'** feature in **myCISI** allows you to pull reports based on an **"event date"** range and participant location. As part of internal practice, CISI sends out **Emergency Alerts** to sponsors based on the exact date of incident. Sponsors, however, can pull emergency rosters that encompass any dates they wish.

It is important to note that participants will appear on emergency rosters only if they are in the location being queried on the date of incident. **Roster results are based on both the initial enrollment information provided by the sponsor AND any trip details that are input into the 'My Itinerary' section of the myCISI participant portal or student app.** For this reason, it is essential that sponsors and participants ensure all travel details are as up-to-date and accurate as possible.

As an example of how a roster populates, let's pretend you enroll a group of students for travel to Australia from October 1, 2017 to October 31, 2017. After enrollment, your participant, Jon Smith, logs into **myCISI** and enters details for an excursion to New Zealand for 10/7/2017 to 10/12/2017.

- ▶ If an earthquake occurs in New Zealand on October 8, 2017, Jon Smith **will** appear on the roster
- ▶ If an earthquake occurs in Australia on October 8, 2017, Jon Smith **will NOT** appear on the roster

Both you—as the sponsor—and CISI will be able to determine if the data on the roster came from the initial enrollment or via a participant’s ‘My Itinerary’ entry by looking at the first column of the emergency roster:

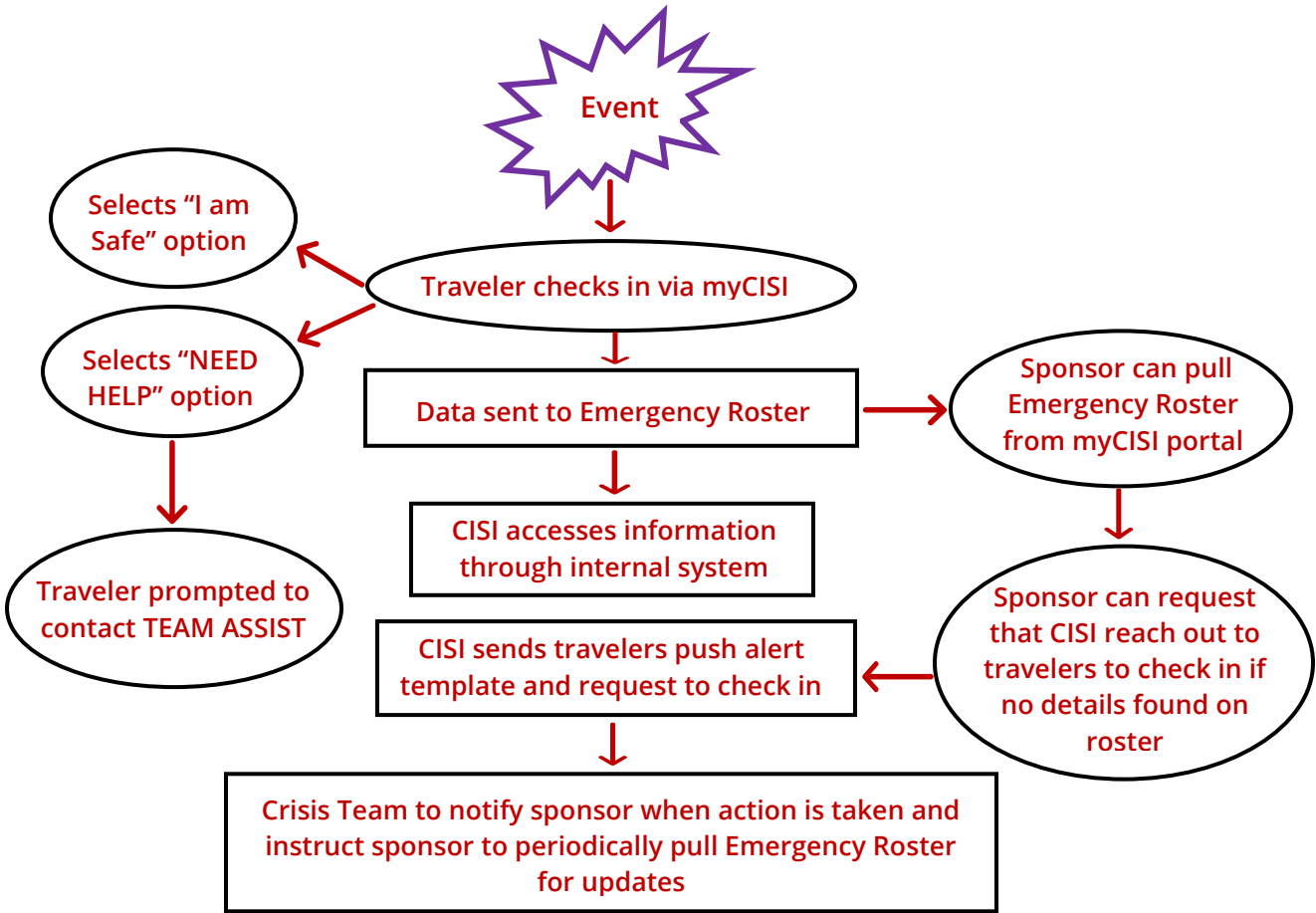
From initial enrollment info
From 'My Itinerary' info

DATA_SOURCE	lob_code	Underwriter	sponsor_id	sponsor_code
ENROLLMENT DATA	UJ	ACE	3344	UJ-SAS
ITINERARY DATA	UJ	ACE	3344	UJ-SAS

In addition to the above information, sponsors can also view “Check In” information on the right side of the roster. When participants check in via the myCISI student app following a security event, whereabouts and status are recorded on the roster.

PLEASE NOTE: “Check In” information will only be displayed on the Emergency Roster for those participants who access this feature on the myCISI website or student app. Because of this, some programs will instruct all participants to download the myCISI app at orientation and mandate that they check in following a security event. If no information is found on the roster for specific participants, sponsors can request that CISI reach out to those individuals to request that they check in.


The below chart describes how the process works:



[Click Here](#) or go to [page 34](#) to learn more about how participants can use the “Are You Safe?” Check In feature.

To pull an emergency roster:

- 1. Go to **‘EMERGENCY ROSTER’** on the left-side menu
- 2. Enter desired search criteria (event date range, destination country/countries, etc.) and then click **‘VIEW/PRINT EXCEL’**



Account Information

Participant Search

Add Enrollments

Enrollment Roster

Emergency Roster

Outstanding Invoices

Emergency roster

Event Date Range From mm/dd/yyyy

09/01/2017

Event Date Range To mm/dd/yyyy

09/01/2017

Destination Country

Select/Unselect all

Iceland

India

Indonesia

International Oceans

Iran

Destination City

Origin Country (optional)

Sponsor Partic ID

Sponsor Program Name

Reset Form

View/Print Excel

- 3. Once opened, sort your file as desired

Important Resources and Links

Country-Specific Resources and Links

CISI
Cultural Insurance
Services International

Home **Resources and Links** Log Out

UJ: UNIVERSITY OF JOY

Welcome to CISI Client Portal

Enrollments

- Add individual enrollments
- Generate your policy specific import templates
- Upload enrollment templates
- Send welcome email packages
- Manage itinerary etc.

Invoicing

- Quickly search through invoices and perform various activities with just a few clicks
- Send welcome package for invoices
- View/print invoice details
- Make online payments
- Receive notifications on outstanding invoices

Search & Reporting tools

- Access claim forms and policy brochure
- Generate enrollment rosters
- Invoice details; Search participants, invoices
- US and international provider search

Destination information

- View any CDC issued health and vaccinations information
- Get destination profile
- Details on visa, exit/entry requirements

Travel information

- View travel alerts and warning issued by the state government
- Get information on US embassies around the world

Other resources

- Embassy listing; Useful links

Account Information

Subscriptions

Participant Search

Add Enrollments

Enrollment Roster

Emergency Roster

Outstanding Invoices

Closed Invoice Search

By clicking on **'RESOURCES AND LINKS'** (top left corner), you will have access to the following country-specific information:

- U.S. Embassies Overseas
- Consular Information Sheets
- Country Profiles
- Health & Vaccination Information
- English Speaking Doctors Overseas

You can also connect to the following sites:

- Center for Disease Control (CDC)
- Office of Foreign Assets Control (OFAC)
- U.S. Department of State
- World Health Organization (WHO)

International Provider Search

For those traveling abroad, CISI is happy to provide information on providers who have worked with CISI. We do not, however, have a specific network which must be utilized (in other words, participants may visit any provider they wish while abroad). Participants can access provider information via the **myCISI** participant portal or student app. For your convenience, this information is also available to sponsors.

To look up international providers:

1. Go to **'INTERNATIONAL PROVIDER SEARCH'** on the left-side menu
2. **'SELECT A COUNTRY'** from the drop-down menu and follow the prompts

Select a country:

Welcome to our database of International Providers

Within this utility you can search for physicians (based upon their specialty), hospitals and clinics worldwide.

Once you are ready to begin your search please select the country you wish to search by from the drop down box above. In the future, this utility will default to that country each time you return.

For the selected country you will also have access to other resources

- U.S. Embassies
- Additional English Speaking Doctors
- Country and Health information:
 - Profiles
 - Specific Information
 - Health concerns and Vaccinations

U.S. Provider Search

CISI has partnered with the First Health Network for international students and scholars studying in or visiting the US. Participants can access provider information via the **myCISI** participant portal or **myCISI** student app. For your convenience, this information is also available to sponsors.

To look up providers:

1. Go to **'US PROVIDER SEARCH'** on the left-side menu
2. Click on the green **'START NOW'** button to agree to terms of use and start your search
3. Enter in your search terms and then **'SEARCH NOW'**

Type of provider

What type of provider are you looking for?

* Provider type: ☐ Physician ☐ Hospital ☐ Urgent care center ☐ Lab and radiology ☐ All providers

Search by

Do you want to search by ZIP or state?

*Select ZIP or state : ☒ Search by ZIP code ☐ Search by state

*ZIP code: Zip code within: 10 miles Distance: Minimum 5 miles Maximum 100 miles

Please enter a valid ZIP code. [Find a Zip code.](#)

Adjust slider to increase or decrease distance

[\[+\] Show more options](#)

[Clear criteria](#)

Search now

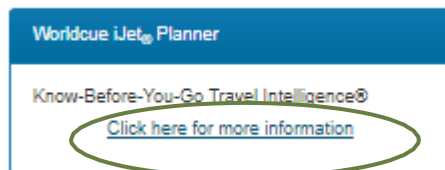
Security Intelligence Information

Please Note: This feature is only available to sponsors whom have opted into the Security Rider as a part of their plan.

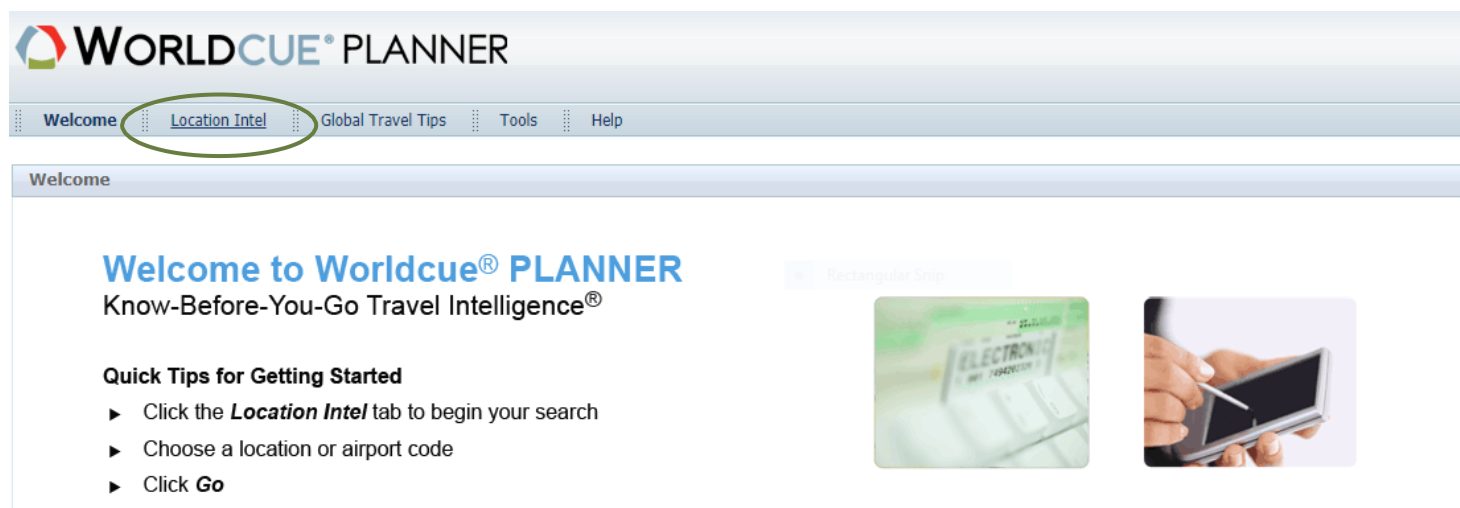
The **'Personal Security Assistance'** link provides you with access to a security assistance website where a wealth of up-to-the-moment security and safety-related tools and information are available. The security intelligence is powered by **iJET Intelligent Risk Systems**. Additionally, you may reach Team Assist with security-related concerns 24/7.

To access security-related intelligence:

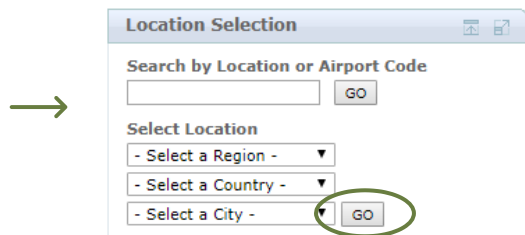
1. Go to **'PERSONAL SECURITY ASSISTANCE'** on the left-side menu
2. Select "[Click here for more information](#)" in the blue Worldcue iJET Planner box on the right side of the screen



3. You are then routed to the **WorldCue Planner** where you can click on **'Location Intel'**



4. On the following page, you have the option to choose your location by **Region, Country** and/or **City**



5. Click **'GO'** and you will come to a page like the following—you can then conduct research on any area of concern you may have

Welcome Location Intel Global Travel Tips Tools Help Terms of Use Privacy Policy

Current Location

Jakarta

Location Selection

Search by Location or Airport Code

GO

Select Location

Asia

Indonesia

Jakarta

GO

Destination Intelligence

DESTINATION OVERVIEW

- Introduction to Indonesia.

SECURITY

- Civil unrest in Jakarta, Indonesia.
- Crime generally poses a medium threat in the Indonesia.
- Emergency numbers and embassy contacts in Indonesia.
- more...

HEALTH

- Health considerations for individuals in Indonesia
- Medical infrastructure in Indonesia
- Recommended immunizations for individuals in Indonesia

CULTURE

- Conducting Business in Indonesia
- Important Dates in 2017 for Indonesia.

Important Notices

No current notices posted for this location

Location Alerts

Key: Critical Warning Informational Rectangular Snip

10/30/2017 00:14 GMT Indonesia - Labor Protests Nov. 10 - Nationwide
Labor unions to stage protests across Indonesia Nov. 10. Expect increased security, localized traffic disruptions.

10/30/2017 03:22 GMT Jakarta - Labor Protest Oct. 31 - Jakarta
Labor groups to protest at City Hall in Central Jakarta, Indonesia, Oct. 31. Expect increased security, localized traffic disruptions.

World Map

Security Rating

Overall Rating: 3 Moderate

Crime	4
Security Services	3
Civil Unrest	3
Terrorism	4
Kidnapping	2

Rating Values: 1 - Minimal, 2 - Low, 3 - Moderate, 4 - High, 5 - Very High, NR - Not Rated

Location Reports

Trip Brief Health Brief Security Brief Immunization Brief

Exchange Rates

1 US Dollar = 13560.913381 Indonesian Rupiah

Weather

No weather data found for current location.

Review items such as:

- **Security** – civil unrest, crime, security services, terrorism
- **Health** – infrastructure and recommended immunizations
- **Culture** – conducting business and important dates
- **Transportation** – air travel, airports, public transportation, maritime services
- **Legal** – location's legal overview
- **Financial** – banking and currency information
- **Environment** – current weather, common weather conditions and climate information
- **Language** – choosing and using interpreters

PLEASE NOTE: The location intel accessible through the myCISI portal is specific to all countries and large cities within the country. If the city or location you are looking for is not listed, please contact the CISI Crisis Management Team who will work with our security provider to retrieve the location intel you for you.

How to Download the 'myCISI Sponsor' App

The myCISI Sponsor app is free and is a great companion to the full myCISI site. To download:

1. Simply click on the below "Google Play" or "App Store" icons:

Android Phones



If the icon link isn't working:

- ▶ Go to Google Play
- ▶ Search 'Cultural Insurance Services International' or 'myCISI'

iPhones



If the icon link isn't working:

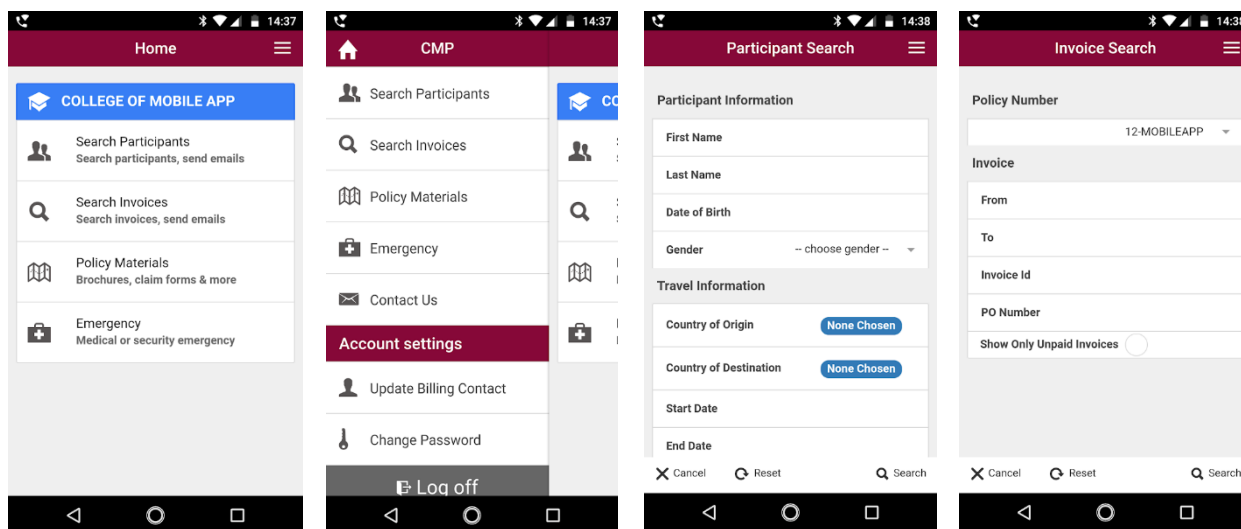
- ▶ Go to the App Store
- ▶ Search 'Cultural Insurance Services International' or 'myCISI'

2. After downloading, ensure that you can log in by using the same credentials used for the full site.
NOTE: If you experience problems logging in, please contact enrollments@mycisi.com or call 203-399-5509 for assistance.

'myCISI Sponsor' App Features

Once accessed, the app provides sponsors with an easy-to-read home screen and simple-to-navigate menu options:

- **Search Participants** – Look up participants to view enrollment details and/or email ID cards to them
- **Search Invoices** – View/email invoices and send Welcome Packages to participants on specific invoices
- **Access Policy Materials** – View/email your group insurance documents
- **Emergency Contact Info** – Get Team Assist's contact information and access the Personal Security Assistance site
- **CISI Contact Info** – Get CISI's contact information
- **Update Billing Contact Info** – Update your account information if needed
- **Change Password** – Change your password if desired



Participant-Specific Information

Ensure Participants Receive Their Enrollment Materials

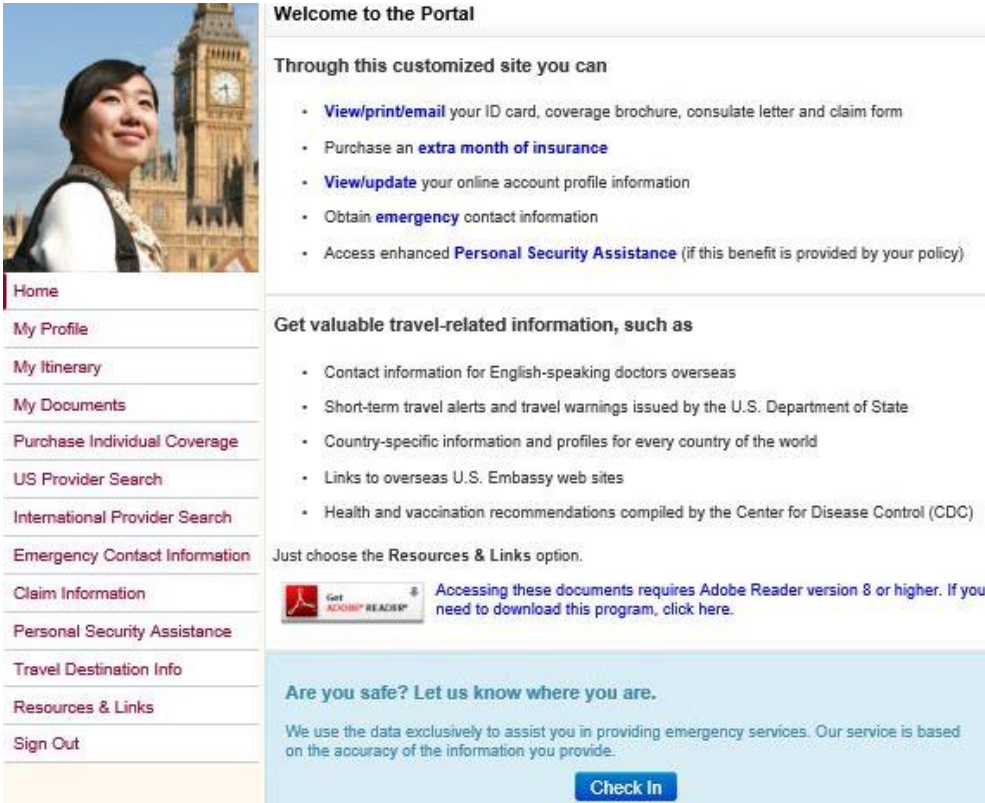
Once participants are enrolled in the insurance and you send them their **'WELCOME EMAIL PACKAGE'** ([Click Here](#) or go to [page 18](#) if you need to review this information), they should have the following information in their email from CISI:

- Participant ID Card
- Consulate Letter
- Brochure & Claim Form
- Information on logging on to **myCISI**
- **myCISI** Student App information
(this app is for all participants, not just students)

PLEASE NOTE: If one or more of your participants does not receive the above information, please have them check their junk mail/spam folders for an email from **'CISI Enrollments'** (Subject Line: **CISI Insurance Materials**). Participants still unable to find the email should make sure that both enrollments@mycisi.com and enrollments@culturalinsurance.com are added to their safe sender list. If problems persist, Kathleen Connors can help. She can be reached at 203-399-5509 or via email at enrollments@mycisi.com.

myCISI Participant Overview and Set-Up

Once your participants receive their welcome email from CISI, they will be able to access both the full **myCISI** participant portal and the **myCISI** student app by clicking on the link provided in the body of the email. Alternatively, participants can go to www.mycisi.com and click on the **'Login to myCISI'** button in the upper right corner. Detailed instructions for creating an account and logging on can be found in the **myCISI Participant Portal Guide** (a part of the Welcome Email Package). Please contact your account manager if you need a copy of the guide.



This screenshot provides an overview of the features/links found on the myCISI Participant Portal website. Please Note: Additional features may be available based on your specific group plan

How to Download the 'myCISI Students' App

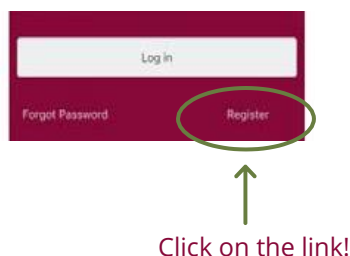
This free app is for all participants, *including faculty/staff members*, and provides many of the same features found on the full website in an easy on-the-go format. Detailed instructions for downloading and using the app can be found in the **myCISI Participant Portal Guide** (which is available from your account manager) but are summarized below for your convenience.

1. When participants receive their '**WELCOME EMAIL PACKAGE**' from CISI upon enrollment in the insurance (subject line: "CISI Insurance Materials"), they can simply click the "[Get myCISI app!](#)" link in the email and follow the prompts to download. In addition to the app link, all emails provide a link to CISI's helpful study abroad video. [Click Here](#) or go to **page 18** if you need to review how to send the welcome email.

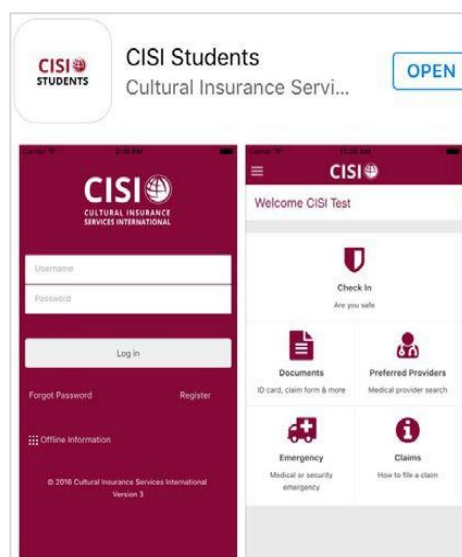
Participants can click the link to access app

You can watch the Study Abroad video here:
<https://youtu.be/uvWSSyntOs>

2. If any participants did not receive the welcome email or can't locate it, they can visit the "Google Play" or "App Store" to download. Simply search for "Cultural Insurance Services International" or "myCISI" and select the 'myCISI Students' icon to download.
3. After downloading, participants can use the myCISI log in information they created via the full website OR register via the app by selecting 'Register' under the white 'Log In' button and following the prompts. *



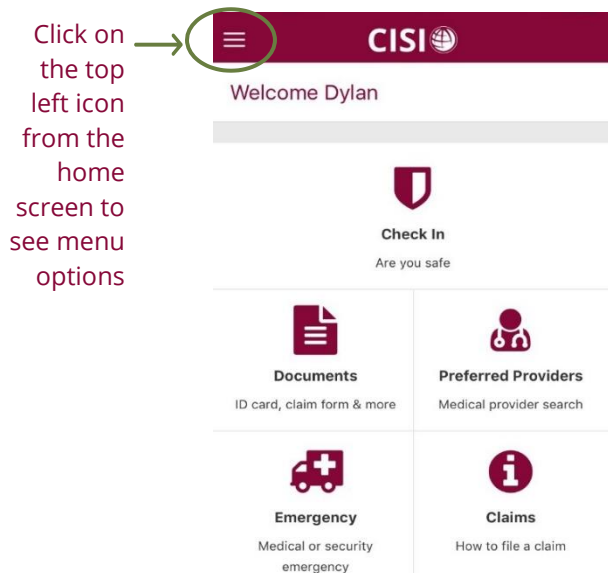
**If registering through the app doesn't work, try registering through the full website. If you continue to have problems, please contact enrollments@mycisi.com or call 203-399-5509 for assistance.*



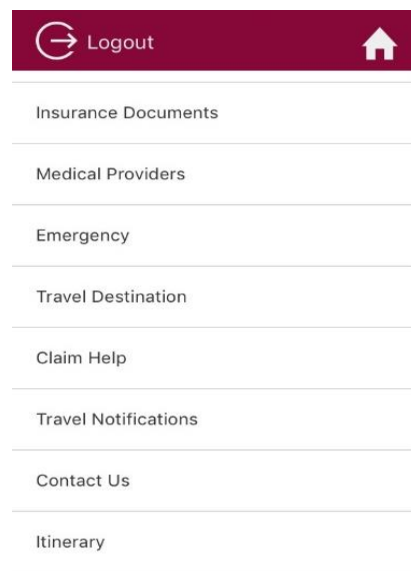
4. Once downloaded, the student app provides users with any easy-to-read home screen and simple-to-navigate menu options:

- **Documents** - Email/view your travel insurance documents or download for offline viewing later
- **Preferred Medical Providers** - Search medical providers worldwide
- **Emergency** - Get Team Assist's contact information and access the Personal Security Assistance site
- **Claim Help** - Get information on filing claims and opening cases
- **Check In** - Let your program and CISI know you are safe when unforeseen events occur
- **Travel Destination** - Get embassy contact details and country-specific details and information
- **Travel Notifications** - Get Up-to-date Travel Alerts and Travel Warnings
- **Contact Us** - All contact information in one place (for CISI claims/benefit questions as well as links to Team Assist)
- **My Itinerary** - Add and edit travel plans on-the-go to ensure you can be located in the event of an emergency

Home Screen:



Menu Options:



HELPFUL HINT

Do you want to see what your participants see?

Simply download the 'myCISI Students' app from "Google Play" or the "App Store" and login with your sponsor ID and password. You can then review the app's features. Please Note: The information you see will be pulled from an actual enrollment under your policy.

Encourage Participants to Use 'My Itinerary'

CISI can more accurately pinpoint the location of participants during emergencies when the **'My Itinerary'** section of the myCISI participant portal or student app is utilized. For this reason, we highly encourage all participants to use this feature. See the below information/screenshots on how participants can access this feature from the myCISI student app:

→

☰

CISI

Click the upper left-side corner to access the Menu where you can manage your itinerary

Welcome Dylan

Check In

Are you safe

Documents

ID card, claim form & more

Preferred Providers

Medical provider search

Emergency

Medical or security emergency

Claims

How to file a claim

1

Logout

Insurance Documents

Medical Providers

Emergency

Travel Destination

Claim Help

Travel Notifications

Contact Us

Itinerary

Click on 'Itinerary'

2

Itinerary

Travel Plans

Enter the date(s) and location you'll be traveling under your policy's coverage period. Add a travel itinerary by choosing "Add an itinerary".

Policy Coverage Dates

16-Sep-2017 to 26-May-2018

Add an itinerary

3

Add Itinerary

Country

City

From date

To date

Mobile #

Email

Note

Save itinerary

Add your information and press 'Save Itinerary'
(Repeat the steps until you have entered in your full itinerary)

33

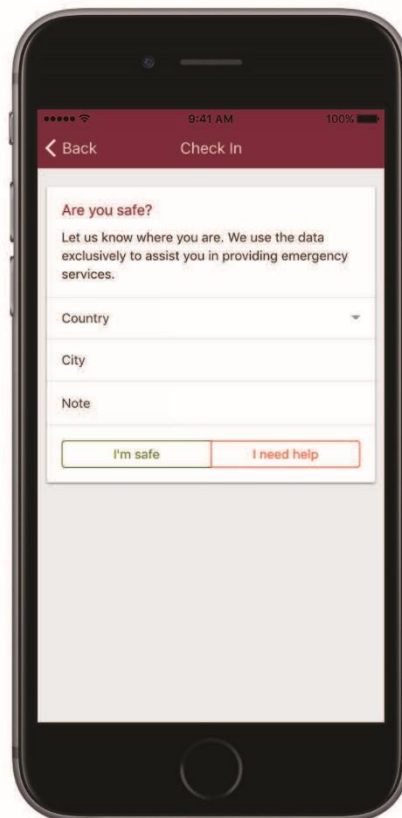
"Are You Safe?" Mobile Check-In

When the unexpected happens, participants can check-in to let you know they are safe via the portal or **myCISI** student app. The app makes it easy to check in – participants just need to click '**CHECK IN**' from their home screen:



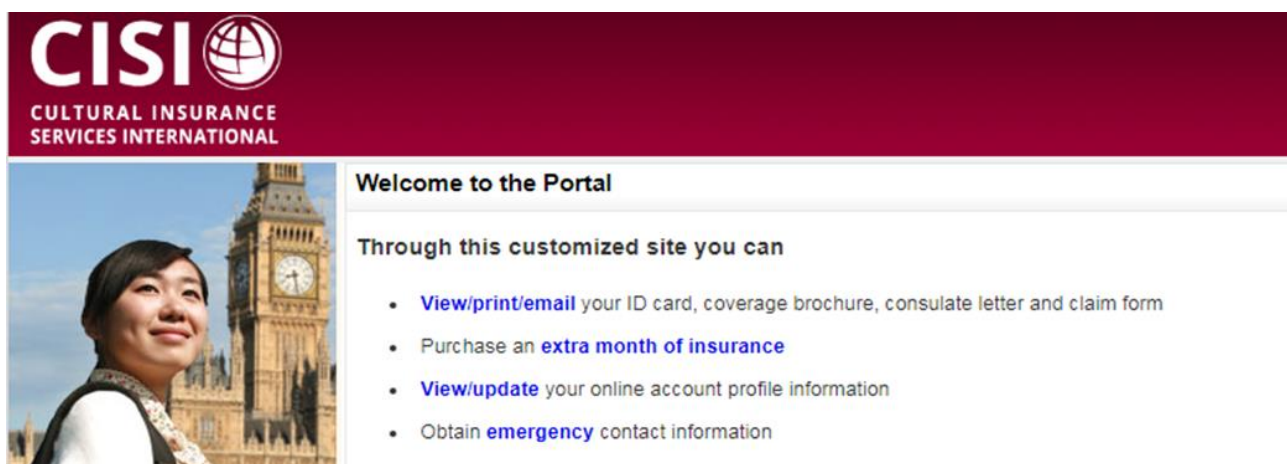
Once checked in, you can pull an emergency roster through the **myCISI** sponsor portal where you can then view participant check-in times and locations.

If a participant needs immediate assistance, he/she will be directed to contact our 24/7 assistance team.



Extend Coverage under Individual Plan Before/After Program

Participants can purchase additional insurance directly through CISI for a period of personal travel (up to one month) outside the dates of their overseas program. Please note that this plan is separate and different from the group study abroad plan and provides coverage for new covered accidents/sicknesses and medical evacuation/repatriation within the new period of coverage while outside the U.S. A detailed brochure describing the coverages, limits and exclusions is available through the **myCISI** participant portal under '**PURCHASE AN EXTRA MONTH OF INSURANCE**'.



PLEASE NOTE: This feature is primarily utilized by study abroad participants. International students/visitors will be directed to the appropriate US-based plan and are encouraged to contact CISI if assistance is needed. The "Extend Coverage" feature is currently not available on the myCISI student app.

Pre-existing Conditions and Continuation of Care Abroad

Students with pre-existing conditions who will need continuation of care while abroad are encouraged to open a case with Team Assist prior to departure. Continuation of care can range from simply verifying whether a specific medication is available/legal to bring into the country to sourcing specialists and making arrangements to carry out a specialized treatment plan.

The participant portal '**Emergency Contact Information**' screen provides convenient one-stop access to CISI's contact information for benefit and claim questions as well as 24/7 Team Assist Emergency Assistance Provider information. Participants can also find this information on the **myCISI student app** under the '**CONTACT US**' link.

Participant Claim Basics

When it comes to claims, participants should keep the following in mind:

In Case of a Minor Injury or Illness:

- ▶ We are always happy to pay a foreign provider directly. Many foreign providers, however, prefer payment from the patient when services are rendered. Insureds using this insurance should be prepared to pay for doctor visits for minor illnesses such as a sore throat or a sinus infection, for example. However, even for a minor illness, if the overseas doctor is willing to bill us directly, we are willing and able to pay them directly for covered medical expenses (this is always up to the provider). International students and visitors to the US should be prepared to pay out-of-pocket for visits to the doctor and submit a claim to CISI.
- ▶ CISI's billing address and claim help # is on each ID card and on the claim form which is part of the brochure. If medical expenses are incurred while abroad or in the US, the claim form and scanned copies of the itemized paid bill(s) can be emailed to claimhelp@mycisi.com. CISI's claim help line (203-399-5130) and email address (claimhelp@mycisi.com) are answered from 9-5 EST M-F.
- ▶ Claims should be submitted for processing as soon as possible (and no later than one year after treatment was received, if possible) and are typically processed within 15 business days provided CISI has all the information needed for reimbursement.
- ▶ A case does not need to be opened in advance for us to pay a claim for covered expenses for minor injuries/illnesses. Team Assist (our 24/7 assistance provider) can help provide referrals to doctors/hospitals worldwide if needed. Insureds in the US will be directed to use providers in the First Health Network. Insureds outside the US may visit any provider they would like and eligible expenses will be covered at 100% (in other words, CISI does not have network restrictions for those traveling outside of the US).

In Case of a Serious Injury or Illness:

- ▶ For all emergencies, seek help without delay at the nearest facility and then, after admittance, open a case with Team Assist (our 24/7 assistance provider).
- ▶ To avoid any delay in treatment, the insured (or someone with the insured) may need to provide a personal payment method to the hospital up front. Once a case is opened, however, it is always our goal to have the hospital or facility bill us directly so that neither the program/sponsor/school nor the insured needs to provide payment. In these types of situations, the insured (or someone calling on his/her behalf) needs to open a medical file with Team Assist asking for help with this. If personal payment has already been processed, we can expedite reimbursement.
- ▶ Our Team Assist medical/travel/technical partner and i-JET (our security partner) are both 24/7 operations. To keep things simple for our insureds, the number to call for a medical/travel/technical issue is the same as for a security related issue. The toll-free 800 and non-800 (when calling from overseas) numbers are on the ID card and in the brochure under the claim form.
- ▶ If a benefit or claim related call or email comes to Team Assist during our business hours it is usually transferred to us. After hours and on weekends, Team Assist handles the communications and involves our Claims Operations Manager as needed 24/7.

Security and Medical Emergencies

Team Assist and Crisis Management Team Overview

Emergency Assistance Offered by CISI's 24/7/365 Assistance Team.

In cases of serious illness or injury requiring inpatient treatment a case should be opened with CISI's Emergency Assistance Team, **Team Assist**.

Team Assist's Services

Medical Monitoring: **Team Assist** has medical staff that will reach out to the treating facility to obtain comprehensive medical updates in order to ensure that the participant is receiving appropriate care.

Medical Evacuation: If it is determined that a participant has been hospitalized at a facility that is not fully equipped to treat their condition **Team Assist** will coordinate a medical evacuation to the nearest medical facility with the resources to provide appropriate care. If it is determined that a participant's medical condition will prevent them from completing their program, **Team Assist** will make arrangements for the participant to return home. They will make travel arrangements suited to the participant's medical condition, including, but not limited to, medical escorts, non-medical escorts, upgraded seating, and air ambulance.

Security Evacuation: Should a participant need to be evacuated due to civil or political unrest, natural disaster, or personal threat **Team Assist** will arrange for transportation to the nearest, safe location, to another program location or home if the situation does not improve enough to allow for a safe return.

Medical Referrals: **Team Assist** can provide referrals to local medical providers. They will work to refer English-speaking providers when requested. They will also use a participant's address abroad as a starting point to provide referrals that are nearest to where a participant is residing.

Medical Coverage: **Team Assist** will reach out to the facility to arrange for direct billing when a participant is admitted for inpatient treatment or requires continuous care.

Continuation of Care: Participants with pre-existing conditions can initiate a case with **Team Assist** ahead of departure to ensure that they will be able to continue treatment while abroad. **Team Assist** will research availability of medication and work with the home physician to refer local providers willing to continue with the established treatment plan.

How to Open a Case with Team Assist

Assist America serves as **Team Assist** and is open 24 hours a day, 7 days a week. Contact information is as follows:

REFERENCE ID# 01-AA-CIS-01133

Outside the US: (609) 986-1234 (Collect Calls Accepted)

OR Toll Free in the US: (800)-872-1414

Email: medservices@assistamerica.com

The CISI Crisis Management Team

The **CISI Crisis Team** consistently works with **Team Assist** to help support you and your participants during a time of crisis. The **CISI Crisis Team** consists of seasoned staff that are actively involved in Emergency Assistance Cases. They are notified at the onset of every case and kept informed throughout the life of the case to ensure that appropriate actions are being taken. Anytime they are notified that a participant has been admitted for inpatient treatment they will reach out to your program directly to make you aware of the case, provide regular updates, and address any concerns you may have.

The CISI Crisis Team is made up of the following team members:

- Health and Safety Manager
- Director of Operations
- Customer Support Supervisor
- Benefit Analyst
- Customer Support Representative

Emergency Contact During Regular Business Hours

Shannon McNamara, our Health Safety Manager, is responsible for overseeing all cases opened with **Team Assist**, from provider referrals, to outpatient visits, inpatient admissions, and medical evacuation and repatriation. She will be the key contact during regular business hours, ensuring that all cases flow smoothly. She will provide updates at the end of each day and week to ensure a smooth transition to the afterhours Crisis Team Duty Officer.

Regular Business hours are Monday – Friday from 9am to 5pm EST.

Shannon can be reached at 1-203-399-5557 or crisis@culturalinsurance.com.

Emergency Contact on Evenings and Weekends

If you are encountering any issues with **Team Assist** and wish to directly speak with a CISI staff member outside of our regular business hours, please contact us on our Crisis Hotline.

After Hours Crisis Hotline is 203-550-9028 or email crisis@culturalinsurance.com.

Please use Team Assist as your primary contact for emergency assistance cases. They have the resources and expertise to best assist you throughout a crisis. CISI is happy to act as an intermediary to ensure your needs and expectations are being met and that participants are safe and secure during their crisis. **CISI kindly asks that you keep this after hours contact information for your crisis personnel and not share directly with your participants.**

Standard Cases and Initial Notifications

Notifications are provided to CISI for all case levels. Many cases fall into this category and can be one of the following:

- Physician referral
- Benefit Question
- Claims Status Question
- Guarantee of Payment (GOP) Requests

Benefit questions are often addressed to **Team Assist** on off hours and a notification will be sent to CISI with the inquiry. These requests as well as Claim Status and other non-urgent queries are referred to the CISI Claims Team to respond to during regular business hours.

Any contact that coincides with an emergent situation is addressed immediately.

Inpatient Cases

If the CISI Crisis Team is notified that one of your participants has been admitted to the hospital, CISI will notify you of this status. All participant's privacy must be honored, therefore, unless you have an existing agreement with CISI that allows us to release personal health information to you or your staff regarding your participant's symptoms, suspected condition/diagnosis or specific treatment plan will be kept confidential ([Click Here](#) or go to [page 42](#) to learn more about **Sharing of Personal Health Information**).

Your emergency contacts will receive the below example of a notification:

*We received notification from **Team Assist** earlier that John Doe has been admitted to Hospital Quiron in Barcelona, Spain for treatment. We are monitoring the situation through **Team Assist** and will keep you updated.*

*Currently, the Hospital Quiron has accepted our Guarantee of Payment and a verbal medical consult with **Team Assist** physicians is scheduled for this evening at 8pm EST. If a medical evacuation is necessary, we will work toward getting John home as quickly and safely as possible. It is important to note that medical evacuation is not a reimbursable benefit and must be coordinated with **Team Assist**.*

Upon inpatient admission, **Team Assist's** medical team reviews the treating facility to determine its adequacy to treat the specific accident or sickness. Once this is confirmed, a GOP is sent for services. **Team Assist's** role is then established with the treating nurses and physicians and if a Release of Information (ROI) is required, they work with the patient or relative to have this completed.

Inpatient cases that are acute, generally those lasting 2-3 days or up to a week, CISI realistically anticipates a medical update every 1 to 2 days and then right before discharge in order to facilitate a transport. For hospitalizations lasting longer than that we look for those updates as frequently as possible keeping in mind that the medical condition may not change for several days. Many doctors do not feel that daily updates are not necessary if there is no change and may not be able to fit in a call with **Team Assist** daily or more than once per week for a long admission.

On average, with a hospitalization lasting one week or longer, we anticipate a medical update on the first and second day and then once weekly after the patient is more stable. Medical social calls (calls placed by **Team Assist** to the patient, or next of kin at bedside) occur 2-3 times a week to address concerns, needs and determine at that time if a request for more frequent updates is needed.

Signature on Release of Information: At the start of the case, participants are provided with a Release of Information form to sign which allows the hospital staff to discuss the medical care with **Team Assist**. Many medical providers, especially those in the United States, will not honor a request for medical management without this release signed. Dependent on the nature of the case, we may ask for on the ground support from your staff in facilitating this process if the hospital staff is difficult to work with remotely.

Placement and Acceptance of GOP: For medical care abroad, our standard process is to issue a Guarantee of Payment and have **Team Assist** confirm acceptance and name of medical provider representative accepting the Guarantee in case there are questions, or paperwork gets lost in the hospital shuffle.

Medical Evacuations

Medical Evacuations occur at the recommendation of the treating physician in coordination with **Team Assist's** physicians. Evacuations can occur for any of the following reasons:

- Transporting a patient to a facility best able to treat their condition.
- The participant's medical condition warrants return to his/ her home country to obtain further medical treatment or to recover.
- Mental Nervous Inpatient or Outpatient (in some cases).

The Evacuation benefit covers transport, services and supplies necessary for the safe transport of a participant. This may include (if recommended by the **Team Assist** physician):

- Upgraded Seating
- Medical and/or Non-Medical Escort
- Wheelchair assistance
- Transport to and from airports
- Air Ambulance

Once an evacuation becomes necessary, **Team Assist** will begin to gather all pertinent information in order to best accommodate the participant.

The process of medically evacuating/repatriating a participant has many factors. Depending on the severity of the illness or injury all or some of the following steps are going to be taken by **Team Assist**:

- Obtain Medical Escort
- Obtain Lodging
- Obtain Flight Clearance

It is important to note that the medical evacuation process can take anywhere from 1-3 days in order to ensure the safety and security of the participant, travel companions and others on the airline.

Occasionally, an eager parent or family member will want to book a flight ahead of **Team Assist** and without their recommendations just to bring their child home. While we sympathize, the benefit is contingent on **Team Assist's** involvement. The medical evacuation benefit is not reimbursable and must be facilitated by **Team Assist**.

Discharge and CTF (Cleared to Fly) not parallel: This is not uncommon. Depending on the illness or injury, the patient may not need to be inpatient but may have a length of time that they are unable to fly. In these cases, a hotel is covered under the medical evacuation benefit until the participant is cleared to fly. These arrangements must also be made by **Team Assist**.

Parent wanting to travel with child being transported: Parents can accompany their children and act as a non-medical escort in the event that one is recommended by **Team Assist's** medical team. If a non-medical escort is not recommended and the parent is on site, **Team Assist** will do all they can to book the parent on the same flight. Depending on the benefits available for this, this would be an extension of the family reunion benefit, or the parent's own cost. If the student is flying in medically necessary upgrade seating, our benefits do not cover this for the parent in the event that a non-medical escort is not needed. The parent can pay the difference between an economy class and business class if they wish to sit with their child.

Emergency Family Reunion Benefit: This is a pay-and-claim benefit UNLESS criteria has been met* and the maximum allowance is enough to allow **Team Assist** to book airfare with a cost within the benefit. Please consult your current CISI Insurance brochure for the conditions of this benefit.

**Parents are welcome to travel at any time during a hospitalization but will only be reimbursed for the airfare/hotel and meals if the student's hospitalization meets the criteria set forth in the policy.*

**The exception to this rule is if the anticipated length of stay provided by the facility meets or exceeds the criteria of the benefit.*

Repatriation of Mortal Remains

In the event of the death of your participant while on your program, **Team Assist** will work toward returning mortal remains to the home country in the manner the family requests and is coverable under the policy.

Repatriation Costs include:

- Embalming
- Cremation
- Minimally Necessary Container appropriate for transportation
- Shipping Costs
- Necessary Government Authorizations

Depending on the religious beliefs of the family or some government authorizations, this process may take time. **Team Assist** will work directly with the family of the participant to work through all legalities and wishes. The **CISI Crisis Team** will provide updates to you throughout this process.

Security Cases

Only CISI sponsors with the Security Rider as a part of their coverage plan will have access to the following.

Basic Security covers evacuations for:

- Political or Military Unrest
- Verified Physical Attack or Verified Threat of a Physical Attack
- Kidnapped or Missing Person
- Persona non-Grata

Comprehensive Security covers evacuations for:

- All Basic Security benefits plus Natural Disaster

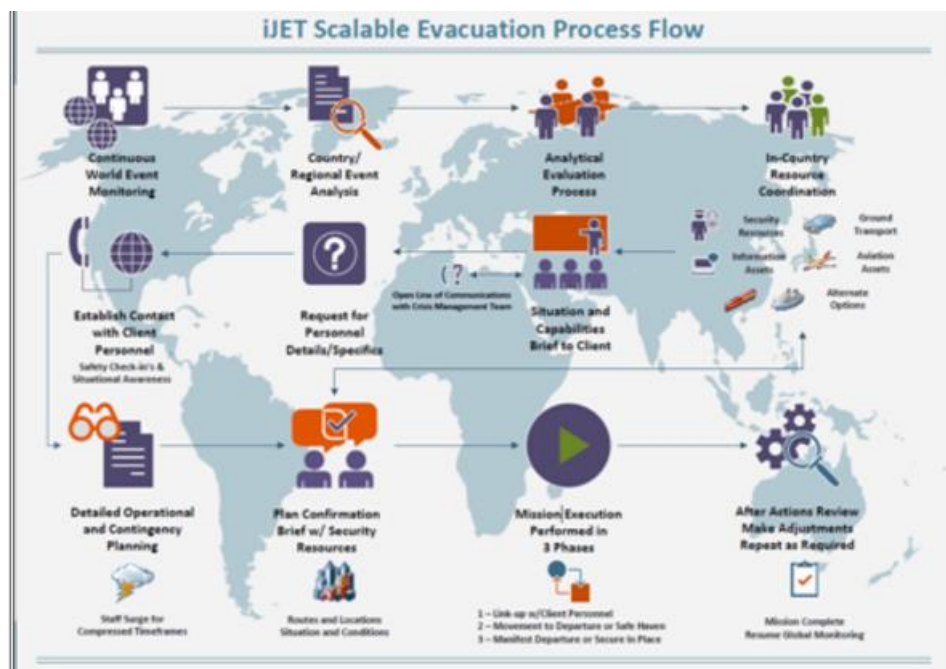
Security Events that Impact Your Participants

A world event or occurrence may not always result in a security evacuation.

When there is an occurrence:

- The CISI Crisis Team pulls information on all reported participants in the affected area (as long as these are reported by the program upon enrollment or entered by the participant in the **'My Itinerary'** section of their **myCISI** portal; [Click Here](#) or go to [page 33](#) to learn more about **'My Itinerary'**).
- If you have a participant in an area that has been affected by a major political/military unrest or natural disaster you will receive communication from CISI with information on the occurrence and travel advice for anyone in the affected area as well as a listing of students reported in the area with their contact information.
- You will be asked to provide any changes or updates as soon as possible in the event that CISI must contact them for a security evacuation. **CISI will not contact any participants potentially impacted by a security situation without your authorization.** We respect that your program has their own emergency protocols to follow.

In the event that a security evacuation has been triggered for the specific area, we will work with you to communicate with your participants. The quickest and most efficient way to evacuate anyone from a volatile area is to have your participant or group leader be in direct contact with our security assistance provider. The CISI Crisis Team will facilitate this contact. We are consistently provided with updates on safety, whereabouts and next steps of an evacuation plan and will communicate this to you immediately upon receipt to ensure all parties are aware of each transport. If a Security Evacuation has been triggered, the below flow chart from our security assistance provider, iJET, outlines the stepstaken.



If an evacuation has not been triggered but the situation abroad needs to be closely monitored, the CISI Crisis Team will send out intel updates to you and your emergency contacts throughout the life of the event. As information changes (in some cases several times per day and in others every few days), we will send this communication to you. At your request, we can also send this information to students directly.

Points to Remember/Consider for Security Evacuations

- Evacuations do not need to be to the home country. **Team Assist** is instructed to extract participants and bring them to the nearest place of safety. Coverage for meals, lodging and transportation is covered for up to 14 days after the evacuation. Prior to that and as soon as reasonably possible, the participant can choose to be sent:
 1. back to the Host Country if return is safe and permitted; or
 2. the Insured Person's Home Country; or
 3. where the educational institution that sponsored the Insured Person's trip is located.
- Any cases of rape or sexual assault do not need to be reported to police if the victim/insured does not wish to do so. The attack needs to be verified, therefore verification by an onsite responsible staff member or program contact is sufficient. The **CISI Crisis Team** in conjunction with **Team Assist** will then take the following steps:
 1. Locate an English-Speaking counselor in the area to meet with the participant if they so wish. If an English-speaking counselor cannot be located quickly, we can work with a counselor in London whom offers secure webcam sessions. Services would be covered under any applicable mental nervous outpatient benefit.
 2. Cover medical costs associated with a rape kit, prophylactic medication or additional medical treatment following the assault if the participant wishes.
 3. Transport the participant back to their home country.
- Self-Evacuations are not covered.
- If your program has opted out of the security coverage or only has the Basic coverage and there is a natural disaster, our security assistance partner will work with you and your participants to get them to safety regardless. The cost of the evacuation will not be covered by CISI. The costs can include, but are not limited to, airfare, ground transportation, meal costs, lodging and any applicable case fees.

Travel After an Evacuation is Triggered

Per the **Security Evacuation Rider**, CISI will not cover Security Evacuation Expense Benefits due to military or political issues for an evacuation requested more than 30 days after the event is triggered. If your program authorizes covered individuals to remain in the area of conflict beyond this period, or allows covered individuals to travel into an area of conflict after an event is triggered, no benefits will be payable under this provision unless another evacuation period is triggered. The triggering of an event is based on the severity of the situation as referenced in any applicable advisory issued by appropriate authorities and confirmation from our security consultant of the likelihood of the continued escalation of the event.

Security Intelligence Requests

If you are looking for security intelligence for a specific location you can obtain this information directly through your customized **myCISI** portal. [Click Here](#) or go to [page 27](#) to learn more about the '**Personal Security Assistance**' link. If you are unable to find the information needed, please contact the **CISI Crisis Team**.

More in-depth requests such as intel based off of an itinerary or in-depth review of a potential site location for a program may carry additional fees as assessed by the security provider. The **CISI Crisis Team** can facilitate the quote process for you.

Legal Issues

Every CISI policy provides an unwritten benefit for a free consultation with our attorney, Dick Atkins. If a participant has encountered legal trouble, regardless of whether or not they are at fault, the following contact information can be used:

Dick Atkins

Work: (215) 977-9982

Cell: (215) 869-8686

Email: dickatkins@aol.com

*It is not necessary to open a case with **Team Assist** or contact CISI in the event that this service is needed.*

General Information

Continuation of Care

This benefit is provided through **Team Assist** to research and support any participants traveling abroad with a known medical condition that requires medication or treatment during their program. It is imperative that these sorts of cases be considered as part of your participant's pre-departure planning. Once abroad, assistance may be challenging in determining legality or availability of medication or some medical services. It is important to determine these hurdles prior to travel so that accommodations can be made that are consistent with the participant's schedule.

Depending on the nature of the condition, a research or Continuation of Care case can take time and involve forms to be completed by both the student, home country physician and overseas physician. CISI recommends no less than 4 weeks prior to departure to begin a comprehensive review of the request.

Please contact Shannon McNamara (crisis@culturalinsurance.com or 203-399-5557) to discuss.

Guarantees of Payment (for students studying outside the US only)

CISI encourages all students to pay and claim for medical treatment in relation to acute illnesses and injuries. In the event that a student does not have the means to pay for medical services, or is admitted as an inpatient, CISI will authorize a Guarantee of Payment to be placed with the medical provider once contacted. If your policy with CISI carries a deductible, the participant will still be responsible to pay this predetermined amount to the medical provider directly.

Sharing of Personal Health Information

In order for most medical providers to share personal health information with **Team Assist** or CISI, a Release of Information form must be signed by the patient or next of kin if the patient is indisposed. This allows the treating physician to discuss medical care directly with **Team Assist**/CISI.

In order for CISI to release personal health information to your program or family members of the participant, an additional release of information must be signed by the participant. There are options available to have a participant sign a release of information prior to travel that would allow CISI to discuss personal health information with your program if hospitalized abroad. Please contact Christine Wasil (cwasil@culturalinsurance.com or 203-399-5508) to discuss these options.



No matter how far you travel...we're there

www.myCISI.com

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