

Summary Plan Descriptions (SPDs) Step-by-Step Instructions

Summary Plan Descriptions

Stay Compliant with the DOL

An SPD describes the rights and responsibilities of both the employer and employee under the group benefit plan by providing detailed information about the health plan itself.

SBAM members can simply combine their basic plan information with the legal pages we provide and the SPD document is ready for distribution to their insured employees.

Be sure to also provide insured employees the *Summary of Benefits & Coverage* and any other benefit booklets given to you by the insurance carrier.



Summary Plan Descriptions

Options & Cost

Enrolled in an SBAM-sponsored Blue Cross® Blue Shield® or Blue Care Network health plan.

- **Free** for any Basic, Premium, VIP or Elite Member

NOT enrolled in an SBAM-sponsored Blue Cross® Blue Shield® or Blue Care Network health plan.

- **\$250 fee** for a Basic or Premium Member
- **\$150 fee** for a VIP Member
- **Free** for an Elite Member

Enter assigned promo code at SPD checkout to receive discount. [Contact Kellie Neiryndck](#) for more information.

Summary Plan Descriptions

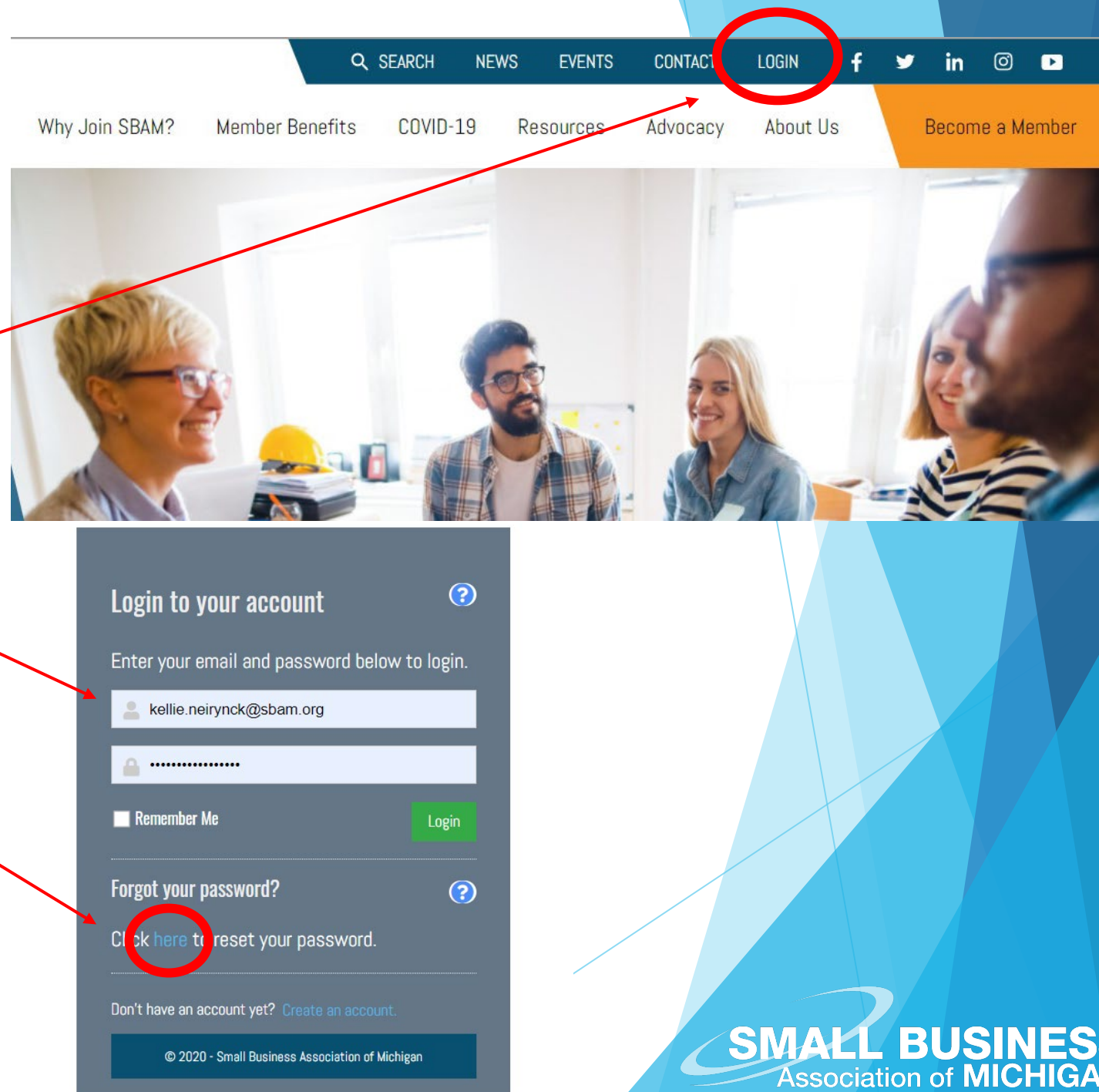
- The following slides give step-by-step instructions on how to download and complete the SPD templates.
- If the member must pay a fee to access the forms, they will have the option to pay via credit card immediately or be invoiced and pay by mail via check.



Summary Plan Descriptions

Logging In

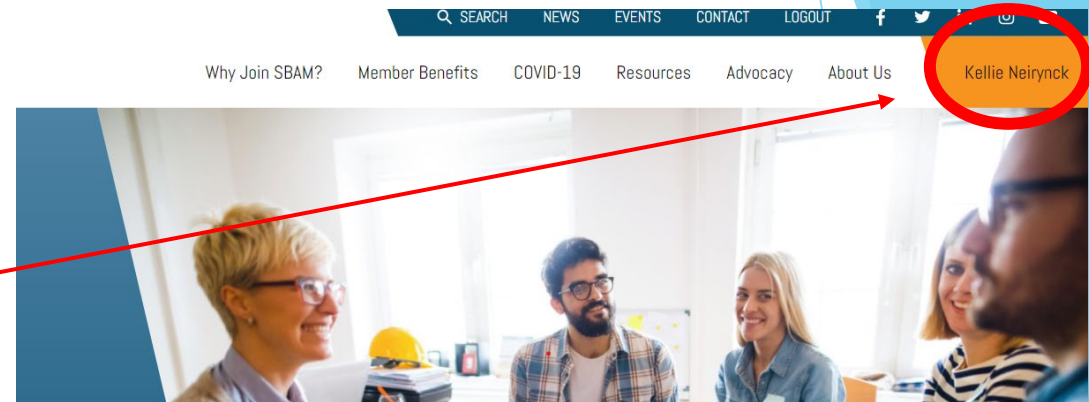
- Navigate to the SBAM homepage www.sbam.org and in the upper left corner, select on '[LOGIN](#)'
- You will be taken to the page where you can enter your email address and password.
- If you do not know your login, select on '[Click here to reset your password](#)'.
- SBAM must have your Organization entered in our membership database for you to access the SPD template. If you have trouble setting up your email and password, please [contact Kellie Neiryck](#).




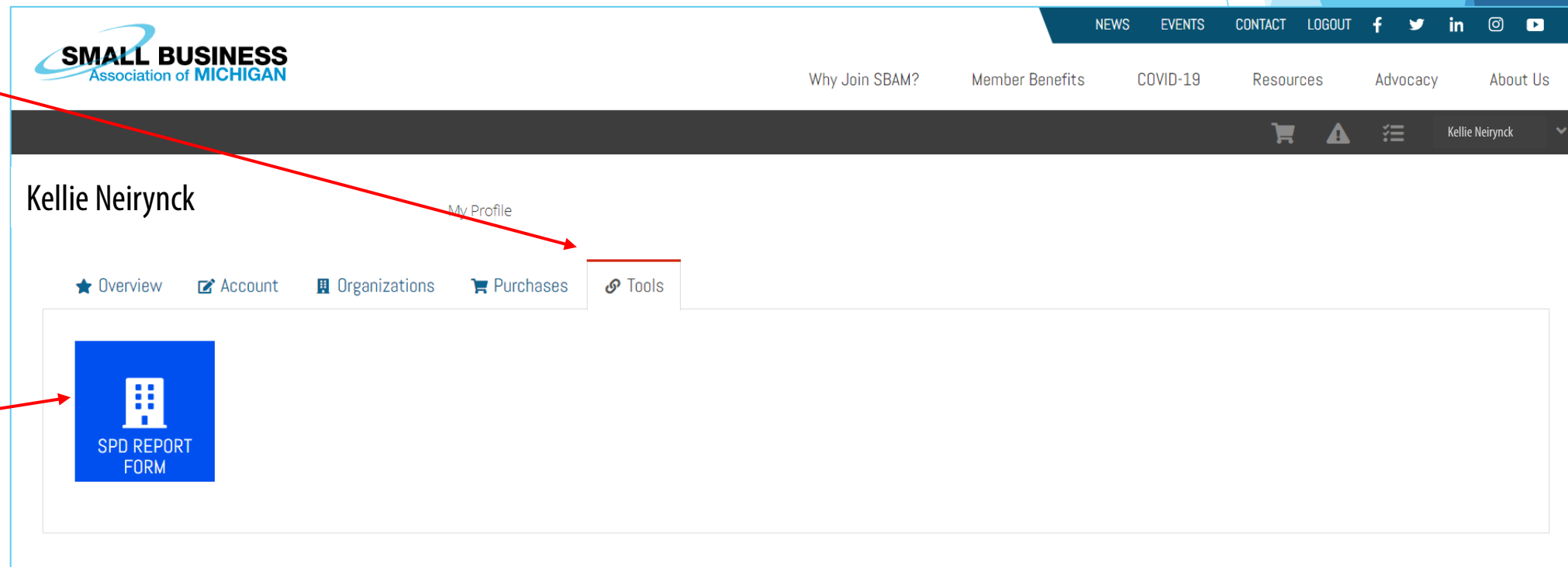
Summary Plan Descriptions

Accessing the SPD Form

- Once you're logged in as a member, you will be taken back to the home page. Select your name in the upper right hand corner.



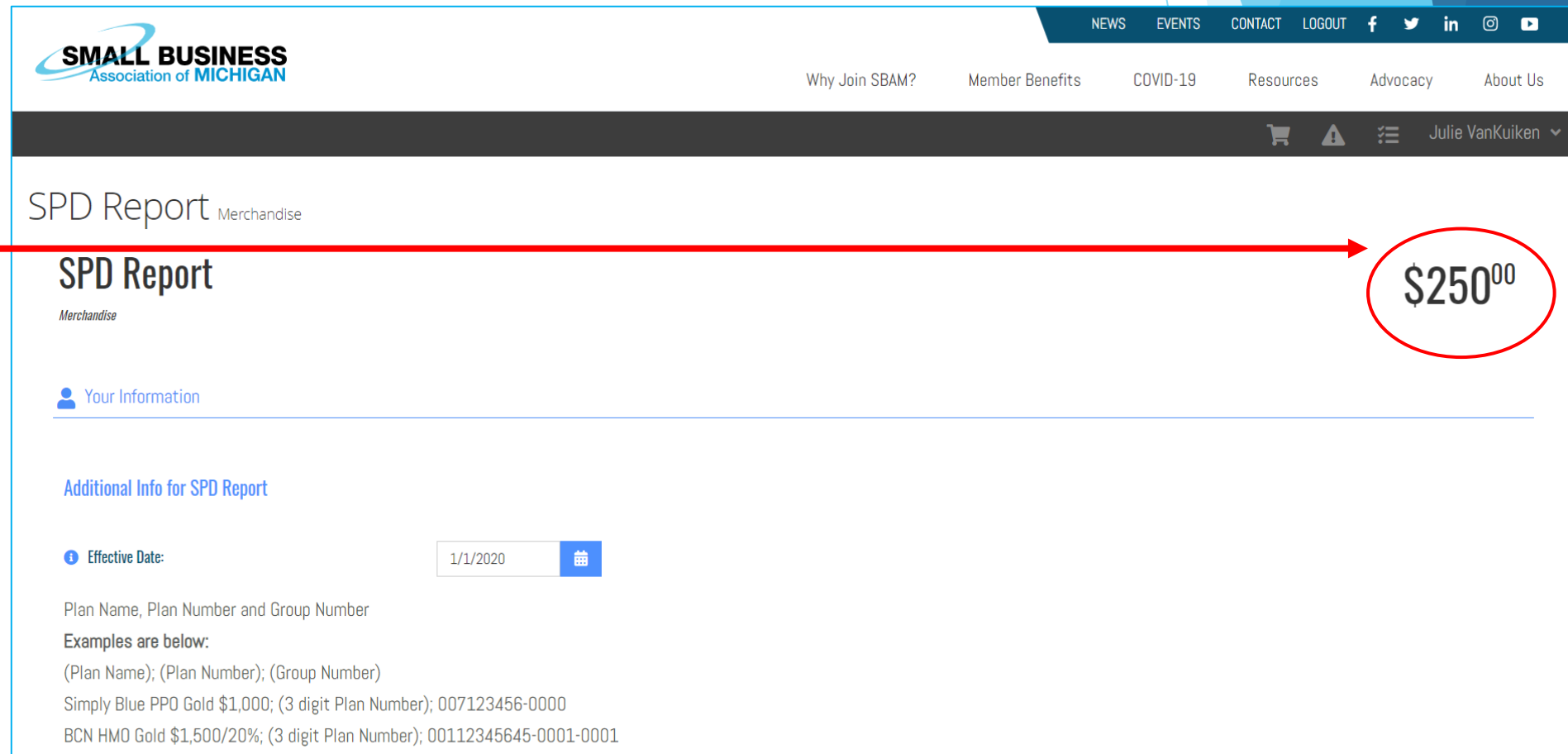
- Select the  Tools tab.
- Select the 'SPD REPORT FORM' icon.



Summary Plan Descriptions

Getting Started

- You will be taken to the first page of the SPD template form.
- The cost of your SPD will be listed as \$250 in the upper right portion of the screen.
- You will have the opportunity to enter any **coupon codes** when you check out that may lower the cost when you check out.



The screenshot shows the website for the Small Business Association of Michigan. The header includes the logo and navigation links: NEWS, EVENTS, CONTACT, LOGOUT, and social media icons. A secondary navigation bar contains links: Why Join SBAM?, Member Benefits, COVID-19, Resources, Advocacy, and About Us. A user profile bar at the top right shows a shopping cart icon, an alert icon, a menu icon, and the name Julie VanKuiken. The main content area is titled 'SPD Report' with a sub-label 'Merchandise'. Below this, there is a section for 'Your Information' and 'Additional Info for SPD Report'. Under 'Additional Info', there is a field for 'Effective Date' set to 1/1/2020. At the bottom, there is a section for 'Plan Name, Plan Number and Group Number' with examples: 'Simply Blue PPO Gold \$1,000; (3 digit Plan Number); 007123456-0000' and 'BCN HMO Gold \$1,500/20%; (3 digit Plan Number); 00112345645-0001-0001'. A red arrow points from the text '\$250' in the list to the price '\$250.00' on the website.

SPD Report Merchandise

SPD Report Merchandise

\$250⁰⁰

Your Information

Additional Info for SPD Report

Effective Date: 1/1/2020

Plan Name, Plan Number and Group Number

Examples are below:

(Plan Name); (Plan Number); (Group Number)

Simply Blue PPO Gold \$1,000; (3 digit Plan Number); 007123456-0000

BCN HMO Gold \$1,500/20%; (3 digit Plan Number); 00112345645-0001-0001

Summary Plan Descriptions

Entering Your Plan Information

- The fields you complete are for your company's medical, dental, vision, life and disability plan information.
- If you have multiple plans, you'll need to enter the information with a **semi colon** in between the plan name, plan number, and group number and **each plan should be on its own line** as follows:

Simply Blue PPO Gold \$1,000; (501); 007123456-0000
BCN HMO Gold \$1,500/20%; (502); 00112345645-0001-0001

- The remaining fields will include information about your plan such as waiting period, eligibility and termination
- Once you've entered all the fields, select the button at the bottom of the screen.

Save & Continue >

Additional Info for SPD Report

Effective Date:

1/1/2020



Plan Name, Plan Number and Group Number

Examples are below:

(Plan Name); (Plan Number); (Group Number)

Simply Blue PPO Gold \$1,000; (3 digit Plan Number); 007123456-0000

BCN HMO Gold \$1,500/20%; (3 digit Plan Number); 00112345645-0001-0001

Delta Dental PPO Plus; (3 digit Plan Number) ;115478

Medical Plan Insurer:

Dental Plan Insurer:

Vision Plan Insurer:

Life Insurance Plan Insurer:

Short Term Disability Plan Insurer:

Long Term Disability Plan Insurer:

Other Plan Insurer:

Summary Plan Descriptions

Editing & Cost

- You can select the 'Edit Information' button if you see a mistake in the fields you completed. Otherwise, continue to the Promo Code section.
- The full price of the SPD will initially show here.
- Discounts are based on your membership level and whether you're enrolled in an SBAM sponsored BCBSM and BCN plan.
- If you're eligible for a discount, enter your assigned promo code in this field and click 'Apply'.

Need your promo code?

Contact kellie.Neiryndck@sbam.org.

Promo Code

If you have a promo code, please enter it in the provided box and then click on the "Apply" button.

 Promo Code:

Apply

Order Summary

ITEMS

TOTAL


\$250.00

\$250.00

Bill to Organization

Our records indicate that you can bill this transaction to the organization you are affiliated with.

 Bill this Transaction to:

Edit Information 

Summary Plan Descriptions


Billing Address

- Select either your Individual record's address or drop down to select your Organization record's address.
- You can also add a new billing address to send the invoice to a different address not already in our system.
- You can pay immediately via credit card.

Bill to Organization

Our records indicate that you can bill this transaction to the organization you are affiliated with.

 Bill this Transaction to:

 Billing Address [+ add new billing address](#)

☒ 120 N Washington Sq, Lansing MI 48933

Payment Options

☒ Credit Card



 Name on Card: *

 Card Number: *

 CVV Number: *



 Expiration Date: *

 Billing Zip/Postal Code: *

 Save this Credit Card?

☐ Stored securely in PayPal 

Summary Plan Descriptions

Send SPD Report & Confirmation Email

- The last step is to send a confirmation email to your own email address with the option to copy in another email address.
- Once you click 'Submit' the SPD Report will be sent to these email addresses.

Confirmation Email

☒ Send confirmation email to:

kellie.neirynd@sbam.org

 Send a copy to:

Submit ✓

- ▶ To edit and resend the SPD, go back to your member profile and click on 'Purchases' then click on 'Recent Invoices'.
- ▶ Select 'View' for the SPD you'd like to edit and resend.

The screenshot displays a web application interface with a top navigation bar and a left sidebar. The top navigation bar includes links for Overview, Account, Organizations, Purchases, Requests, Tasks, Documents, and Tools. The left sidebar lists various sections: Recent Orders, Recent Invoices, Recent Payments, Memberships, Subscriptions, Advertising, Events, Merchandise, Publications, and Courses. The 'Purchases' section is active, showing a table of recent invoices. The table has columns for Number, Main Item, Total, Balance, Created On, PDF, and View. The first row shows an invoice for 'SPD Report' with a 'View' button. A red arrow points from the top navigation bar to 'Purchases', another red arrow points from the left sidebar to 'Recent Invoices', and a third red arrow points from the 'View' button of the first invoice.

Number	Main Item	Total	Balance	Created On	PDF	View
1402641	SPD Report	\$0.00	\$0.00	4/7/2022 10:44 AM		View
1402311	SPD Report	\$0.00	\$0.00	4/6/2022 10:30 AM		View
1242011	SPD Report	\$0.00	\$0.00	12/9/2021 10:21 AM		View
1205891	SBAM Passing the Torch Celebration - December 8, 2021	\$0.00	\$0.00	11/2/2021 12:16 PM		View
1036161	2021 SBAM Virtual Annual Meeting & Small Business Summit	\$0.00	\$0.00	6/14/2021 9:07 AM		View


- ▶ The email will come from websupport@sbam.org with attachment 'OrderConfirmation.pdf'
- ▶ The attachment will be your SPD document

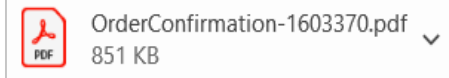
Order Confirmation (1603370)



websupport@sbam.org

To  Kellie Neiryck

 If there are problems with how this message is displayed, click here to view it in a web browser.



Thu 4/7/2022 11:45 AM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Order Confirmation

Small Business Association of Michigan

120 N Washington Sq. Suite 1000, Lansing, MI 48933

Phone: (517) 482-8788 Email: websupport@sbam.org

Bill To:

Kellie Neiryck

Email: kellie.neiryck@sbam.org

Order Info:

Customer #: 151629 **Order #:** 1603370 **Order Date:** 04/07/2022

► Select 'View'

Line Items

Item	Item Price	Charge Amount	Discount	Purchase Profile
SPD Report Merchandise	\$150.00 (VIP without BCBS or BCN)	\$150.00	\$150.00 (SBAMBlue)	View

► Select 'Edit Information'

SPD Report Purchased on Thursday, April 7, 2022

Order Details

Purchased on Thursday, April 7, 2022
Kellie Neiryndck (Senior Director of Products & Services)
Customer No: 151629
Order: 1603370

Billing:

Kellie Neiryndck (Senior Director of Products & Services)
United States

[Print Purchase](#) [Edit Information](#)

- ▶ Edit the information within the fields then click 'Save' at the bottom and close out of the screen.

SPD Report

Purchased on Thursday, April 7, 2022

Order Details

Purchased on Thursday, April 7, 2022
Kellie Neiryck (Senior Director of Procurement)
Customer No: 151629
Order: 1603370

Billing:

Kellie Neiryck (Senior Director of Procurement)
United States

Effective Date:

1/1/2022

Plan Name, Plan Number and Group Number

Examples are below:

(Plan Name); (Plan Number); (Group Number)

Simply Blue PPO Gold \$1,000; (3 digit Plan Number); 007123456-0000

BCN HMO Gold \$1,500/20%; (3 digit Plan Number); 00112345645-0001-0001

Delta Dental PPO Plus; (3 digit Plan Number) ;115478

Medical Plan Insurer:

Simply Blue PPO Gold \$1,000; 007123456-0000; 501 & BCN HMO Gold \$1,500/20%; 00112345645-0001-0001; 502 & Delta Dental PPO Plus; 115

Dental Plan Insurer:

Dental PPO 007123456-000; Delta Dental 23146

Vision Plan Insurer:

VSP Vision 007123456-000

Life Insurance Plan Insurer:

Dearborn Life 123456

Print Purchase

Edit Information

- ▶ Go back to your member profile once again and click on 'Purchases' then click on 'Recent Invoices'.
- ▶ Select 'View' for the SPD you just edited and would like to resend.

The screenshot shows the member portal interface. The top navigation bar includes links for Overview, Account, Organizations, Purchases, Requests, Tasks, Documents, and Tools. The 'Purchases' tab is selected. On the left sidebar, 'Recent Invoices' is highlighted. The main content area displays a table of recent invoices with columns for Number, Main Item, Total, Balance, Created On, PDF, and View. The first invoice is for 'SPD Report' with number 1402641, dated 4/7/2022. A red arrow points to the 'View' button for this invoice.

Number	Main Item	Total	Balance	Created On	PDF	View
1402641	SPD Report	\$0.00	\$0.00	4/7/2022 10:44 AM		View
1402311	SPD Report	\$0.00	\$0.00	4/6/2022 10:30 AM		View
1242011	SPD Report	\$0.00	\$0.00	12/9/2021 10:21 AM		View
1205891	SBAM Passing the Torch Celebration - December 8, 2021	\$0.00	\$0.00	11/2/2021 12:16 PM		View
1036161	2021 SBAM Virtual Annual Meeting & Small Business Summit	\$0.00	\$0.00	6/14/2021 9:07 AM		View

	Item Price	Charge Amount	Discount	Purchase Profile
ort andise	\$150.00 (VIP without BCBS or BCN)	\$150.00	\$150.00 (SBAMBlue)	View

Note +

Category	Note Title	Note	Follow Up Date	Created On ▼	Created By	Edit
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kel@neirynck@sbam.org
4/7/2022 10:44 AM

Subtotal: \$150.00
Discount: \$150.00
Total: \$0.00
Payments: \$0.00
Balance: \$0.00

- ▶ Click on 'Send Invoice'
- ▶ Then click 'Send'

[Print](#) [Send Invoice](#) [Report](#)

Send Invoice Confirmation Email

Send confirmation email to: *

kel@neirynck@sbam.org

Send

Cancel

- ▶ The email will come from websupport@sbam.org with attachment 'InvoiceConfirmation.pdf'
- ▶ The attachment will be your edited SPD document

Invoice Confirmation (#1402641)



websupport@sbam.org

To ✓ Kellie Neiryck

↩ Reply

↩ Reply All

➡ Forward



Mon 5/9/2022 10:23 AM

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InvoiceConfirmation.pdf
851 KB

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**Small Business
Association of**

Michigan

120 N Washington Sq.
Suite 1000, Lansing, MI
48933
(517) 482-8788

INVOICE

Date: May 09, 2022

Invoice #: 1402641

Bill To:

Kellie Neiryck

SMALL BUSINESS
Association of MICHIGAN

Summary Plan Descriptions

Thank you!

- Please contact [Kellie Neiryndck](#) if you have any questions or concerns.
- Visit www.sbam.org/SPD for more information.

