2024
Employee Navigator System Training

Presenters:

Holly Cyran, Client Support Director

Liza Puretz, Ease Support Manager

Agenda

Full agenda is available in the *Handouts* section

Day 1 Projected

- Welcome
- The basics of logins and permissions
- Where to find support & training resources
- Creating a company
- Building plans & testing
- Imports
- Open enrollment

Day 2 projected

- HR/Employee experience
- Day-to-day management
- Reporting options
- Tour of additional features

We could not be more excited to have Ease's roadmap for broker features

We’re working to earn your trust by demonstrating our commitment to add features

Prior Release Highlights

- Add HSA without requiring medical
- Graphical org chart
- Added pay frequencies: 16,17,23,27,34
- Aflac API parity
- UNUM’s EOI widget, next move to Principal
    - (we already have MetLife and Guardian)
- List last 5 companies
- Ease's company list
- Benefit signatory field
- Auto drop of dependents enabled by default
- Default value for "capture beneficiary" set to required
- Coordination of Benefits available or Dental & Vision
- 15th of the month termination rule
- Support for supplement life & Gap medical
- Carrier census

Recent Release Highlights

- Rate library
- Custom HR fields
- Single employee eligibility override
- Schedule hours override
- 834 simplification
- New Class Structure for rule: Job Class
- Agency contacts for a company
- Phone number parity between EN & Ease
- New history tables for compensation
- Import of employees without SSN

Updates are released ~ every 2 weeks

Don’t believe what you’re hearing on the street

- Integrations will continue to be set-up by the Ease team
- There is no date that Ease will be shut off
- Brokers will be able to choose when to migrate their groups
- There will be continued access to Ease for historical data

It will be OK

EN supports 9 million EE’s

Don’t Rush

Ease support 3.5M employees

Decide when you will introduce a client to EN

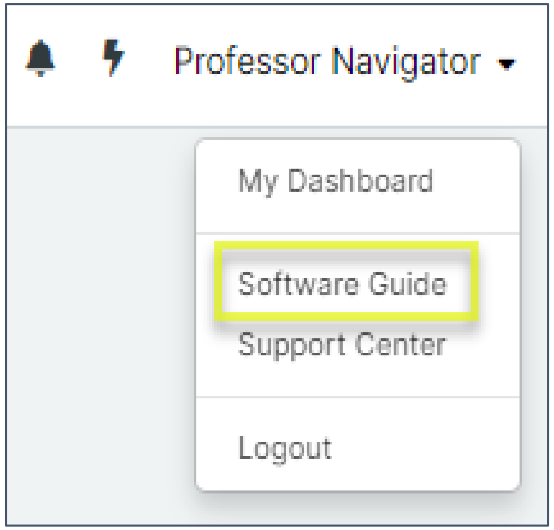
- Implement a company mid-year
  - Build current plans and import existing enrollments
  - Use for new hires and managing changes for existing employees
  - Take advantage of integrations that EN offers

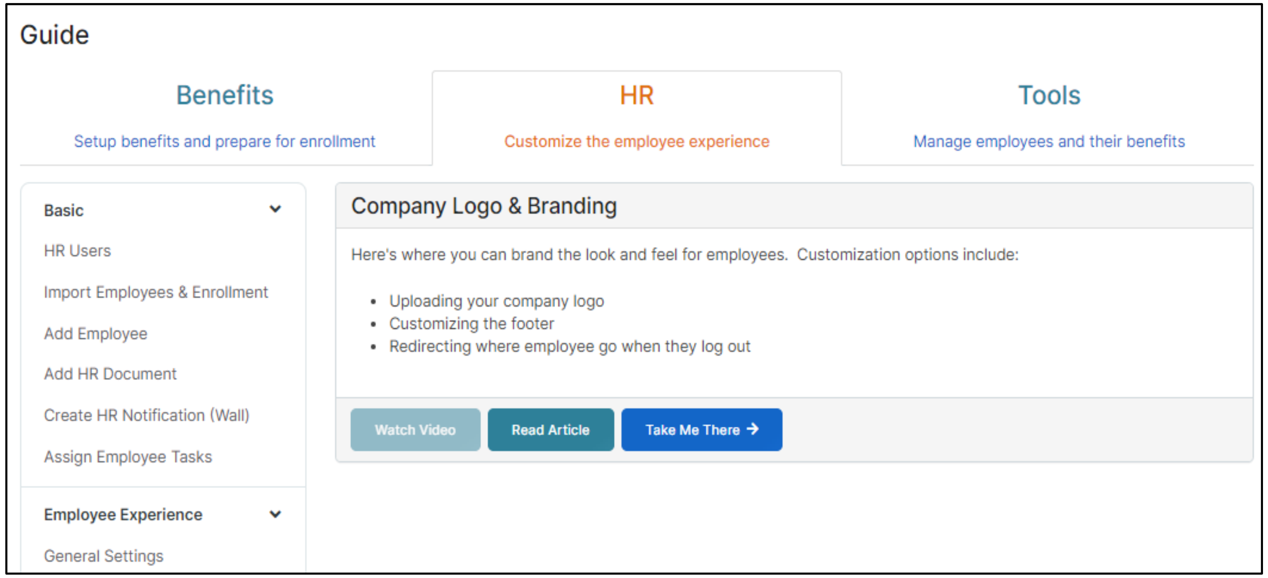
- Introduce the company for open enrollment
  - Create only the open enrollment plans
  - Don’t worry about adding current plans
  - Import employees and welcome them to open enrollment
  - Changes are easier to announce during open enrollment

Support & Training Resources

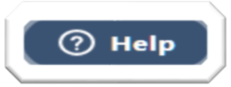
Support resources within the system

- **Software guide**
  - Use this tool to get an overview and quick link to software features including:
    - **Benefit** features used to set up plans and prepare for enrollment
    - **HR** features used to customize the employee experience
    - **Tools** used to manage employee and their benefits
  - Within a company, click your name and select *Software Guide* from the menu





Online support resources

- Help button 

    - Search for answers to questions without leaving the system
    - Located in the lower right corner of every system page
    - Click to do a quick search by topic or access the Knowledge Base 

- Knowledge Base/Help Center (https://support.employeenavigator.com)
    - Over 1,000+ articles providing information about system tools and best practices
    - Requires registration (click here to register), any user type can register including HR
    - Accessible via the Help button and available 24/7

- Employee Navigator Blog (https://employeenavigator.com/blog)
    - Provides important news and updates regarding the Ease acquisition
    - Links to case studies and partner integration updates
    - Includes Op-Eds shared from our CEO George Reese

Additional online resources

- Check out Sales & Marketing Overview in the knowledge base
  - Employee Navigator media kit
  - Marketing materials
  - Other helpful information

- Check out our Training Information section in the knowledge base
  - Articles that provide additional help on
    - Getting started
    - Additional training options
    - Best practices
  - Check out information about our **free** HR Training program

Training resources

- EN University
  - Registration required (click here to register)
  - Access 30+ training courses
  - Play and pause capability to help you learn at your own pace

- Training workbook
  - Located in the *Training* section of the Knowledge Base/Help Center
  - Contains exercises & challenges to help develop skills while building a sample company
  - A “hands on” training experience; we use it to train our own employees

- Virtual training
  - Covers how to create a company, add plans & employees and conduct open enrollment
  - Review fundamental tools, our most popular features, and best practices to getting started
  - Attend live or view a recording

Let’s take a quick look at these resources

Premier support resources

Premier resources: *Client Support*

- Our team receives ~500 inquiries per day via phone/email
  - Callers are connected to a live specialist within 33 seconds on average
  - Emails are responded to in less than 4 business hours on average

- Specialists provide the premier user:
  - Troubleshooting tips
  - Guidance on how to resolve/prevent issues
  - 80% resolution with the 1st response

What is a *premier user* ?

- A user designated to be the 'resident expert' for their license
- The number of *premier* users for an agency is determined by the license
  - Refer to your agency contract for information about cost/options add more
- *Premier* status can be transferred at any time via written request
  - Must be submitted to support@employeenavigator.com via the existing premier user
- The *premier* user has exclusive access to additional support resources

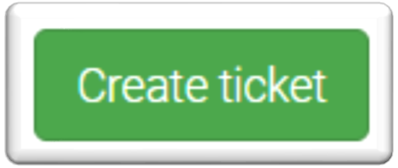
Premier support: How to connect

Phone

301.583.5180
M-F 9am – 7pm EST

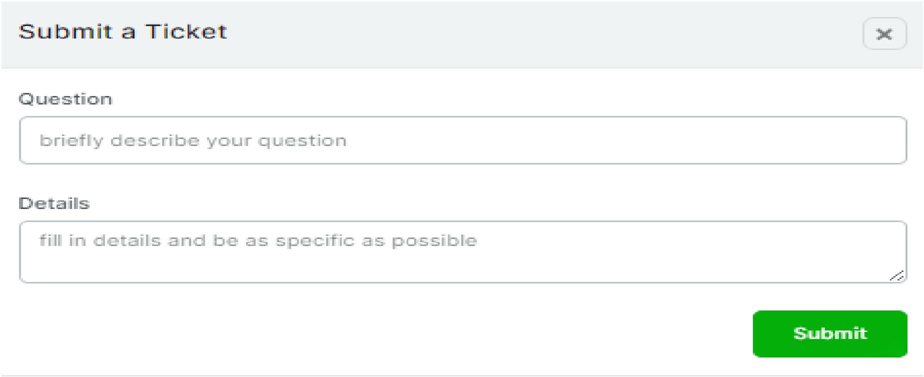
Email

support@employeenavigator.com



Create a ticket

From the tab “Support” within your agency platform, you can create a ticket to send an inquiry to our team



Premier resources: What *Client Support* needs

Your info (when calling)	Company info
• Name • Brokerage • Email address	• Name • Exact issue at hand • Employee examples • Expectations vs. issue

Tip: *The more details you provide, the faster we can help resolve the issue*

Now let's get into the system