



## Day 1

### Add a company

- Basic company configuration settings
  - Class structure
  - Branding
  - HRIS Field Tracking; setting fields as HR required to avoid errors
- Defining the enrollment experience
  - Enrollment settings
  - Enrollment window
  - Employee/Dependent required fields
  - Creating default eligibility rules

### Add plans

- Creating plans
  - The 6 elements of a plan build
    - Policy info, Eligibility & Enrollment, Benefits, Costs, Advanced, Reports
  - Adding basic plans and options to create plans
    - Medical plan via *Rate Library* and setting up plan-based contributions
    - Dental plan from scratch
  - Add documents
- Testing what you've created with a demo employee

### Setting up open enrollment

- Creating an OE session
- Adding plans
- Sending a welcome; customizing OE notifications
- Testing what you've created with a demo employee

### Importing employees

- Sending a bulk welcome email & registration requirements

### Add more plans

- Create HSA
  - Now payroll group required
    - Setup payroll groups; process imports to add information on payroll group
- Create a current plan
  - Add a Voluntary Life plan
  - Add a group LTD plan
- Enrollment tools
  - Bulk enrollment tools (LTD)
  - Importing enrollment data (Vol Life)



## Day 1 continued

### Renewing current plans

- Renew vs copy vs extending

### Adding more plans to open enrollment

- Ending plans tab review and passive enrollment logic

### Review of additional plan types

- Review of some plan types already built out
  - Cafeteria
  - 3rd party app

### Other places to add plans from

- Marketplace plans
- Create an agency library
  - Private exchange; ancillary, same medical for region, standardize plan summary
- Carrier API

## Day 2

### HR & Employee Experience

- Inviting HR; defining their permissions & access controls
- Adding newly hired employees
  - Employee registration and enrollment experience
- Managing employees and enrollment
  - Updating demographics
    - Schedule demographic changes, future dated salary changes impact on OE
  - Processing EOI decisions
  - Terminations and termination updates/changes

### Reporting on employees and enrollments

- Enrollment activity and troubleshooting tools
  - Employee datasheet, company timeline, employee timeline, benefits eligibility
- Getting enrollment to carriers
  - Building custom reports to send to a carrier
  - Saving and sharing reports
- Changes report
  - The Wall: Rekeying data in the carrier portal
  - Other preconfigured change reports
- Integrations: Carrier, Cafeteria, Payroll



## Day 2 continued

### Tour of some additional features (You won't remember all this; it's in the Help Center)

- Admin correction tools
  - Rehire vs Undo Termination vs Termination Edit
  - Managing scheduled changes
  - Modify current enrollments vs Enrollment editor
- Integrated payroll
  - Live training webinars available monthly, also available in EN University
- ACA highlights
  - Recorded training sessions available on our university
- Open enrollment training
  - Webinars conducted 3x's annually, recordings available in the Help Center
- Good data
  - Bad export data report
  - Audit reports
  - Address validation
- Audit tools
  - Reports: Employees missing HR tracking: designed to export, add data, then import
  - Company overview
  - Plan details

### Wrap Up: Q&A Session