



TRAINING

Employee Navigator System Training

Day 3



BEFORE WE BEGIN

Tips for using your panel tools to engage



View in full screen



The slide presentations are available to download in the Materials section



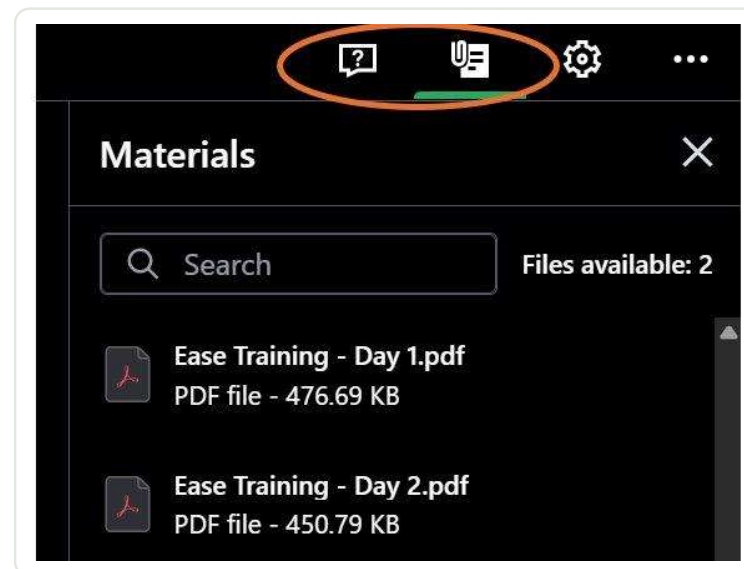
All participants are in “listen only” mode



Use the Questions section to submit questions to our team



Yes, this will be recorded! It will be posted in Employee Navigator Training for Ease Brokers



Materials panel — download the handouts here



AGENDA

What we'll cover today



Recap



Testing the build

Using a demo employee



Adding employees & dependents to the system

Census import · Importing plan enrollments · Enrollment tools



Enrollment management

Initiating integrations · Manual options



LOOKING BACK

Weekly Recap, So Far

✓ A new group has been added to the application

- Completed the company profile, structure, payroll group, benefit setup, and default eligibility rules
- Benefits added: medical, group life and AD&D, voluntary life and AD&D, group STD, voluntary LTD, cafeteria plan (FSA), and HSA plan
- Added a plan document
- Built plan communications and category overviews



SECTION 01

Testing the build

01



TESTING THE BUILD

Why test your build?



Catch errors early

- Identify data entry errors before your client does



Customize with confidence

- Review opportunities for customization



See both sides

- Understand the workflow from two perspectives:
 - HR hiring a new employee
 - The employee enrollment flow



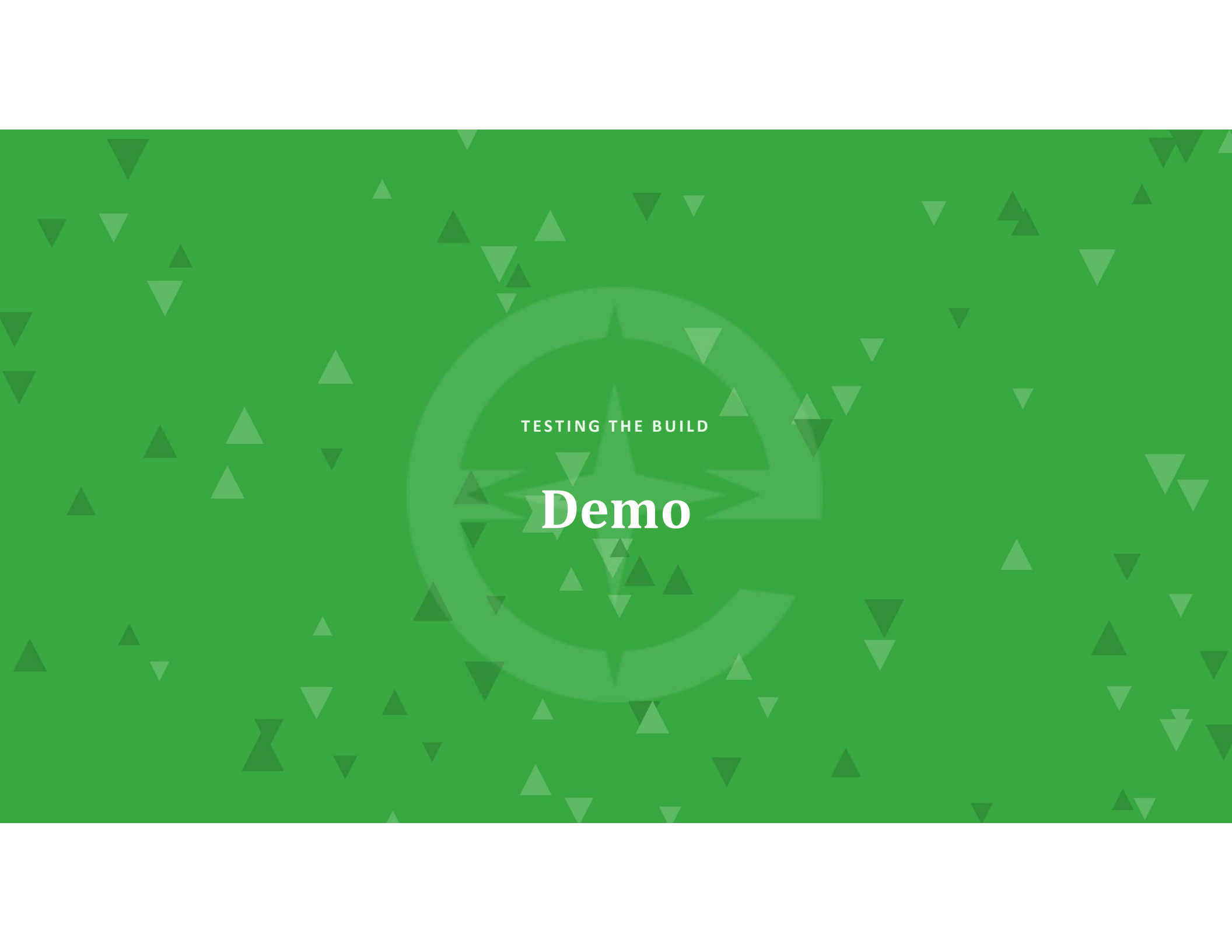
TESTING THE BUILD

Testing your build — use a demo employee

✓ Purpose of Demo Employees

- Test company setup, plan eligibility, and user experience before going live
- Not included in reports or carrier files — no cleanup required
- Ideal for validating third-party integrations and enrollment flow



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TESTING THE BUILD

Demo

SECTION 02

Adding employees & dependents to the system

02

IMPORTING DEMOGRAPHICS

Basic import information



Getting started

- Use Employee Navigator templates
- Remove unnecessary columns from the template
- Imports cannot be undone or reversed
 - Support can help with bulk delete requests



Importing without SSNs

Possible when:

- No employees exist in the company
- Dependents are not included in the import file
- No enrollment record will be attached until an employee SSN is completed



ENROLLMENT TOOLS

Bulk enrollment

Used for employer-paid benefits where eligible employees should be enrolled

SUPPORTED PLAN OPTIONS

Group Life	Group AD&D	Group Life & AD&D	Group STD	Group LTD
EAP	EAP COBRA Qualified	Health & Wellness Perks	Company Perks	Financial Perks



ENROLLMENT TOOLS

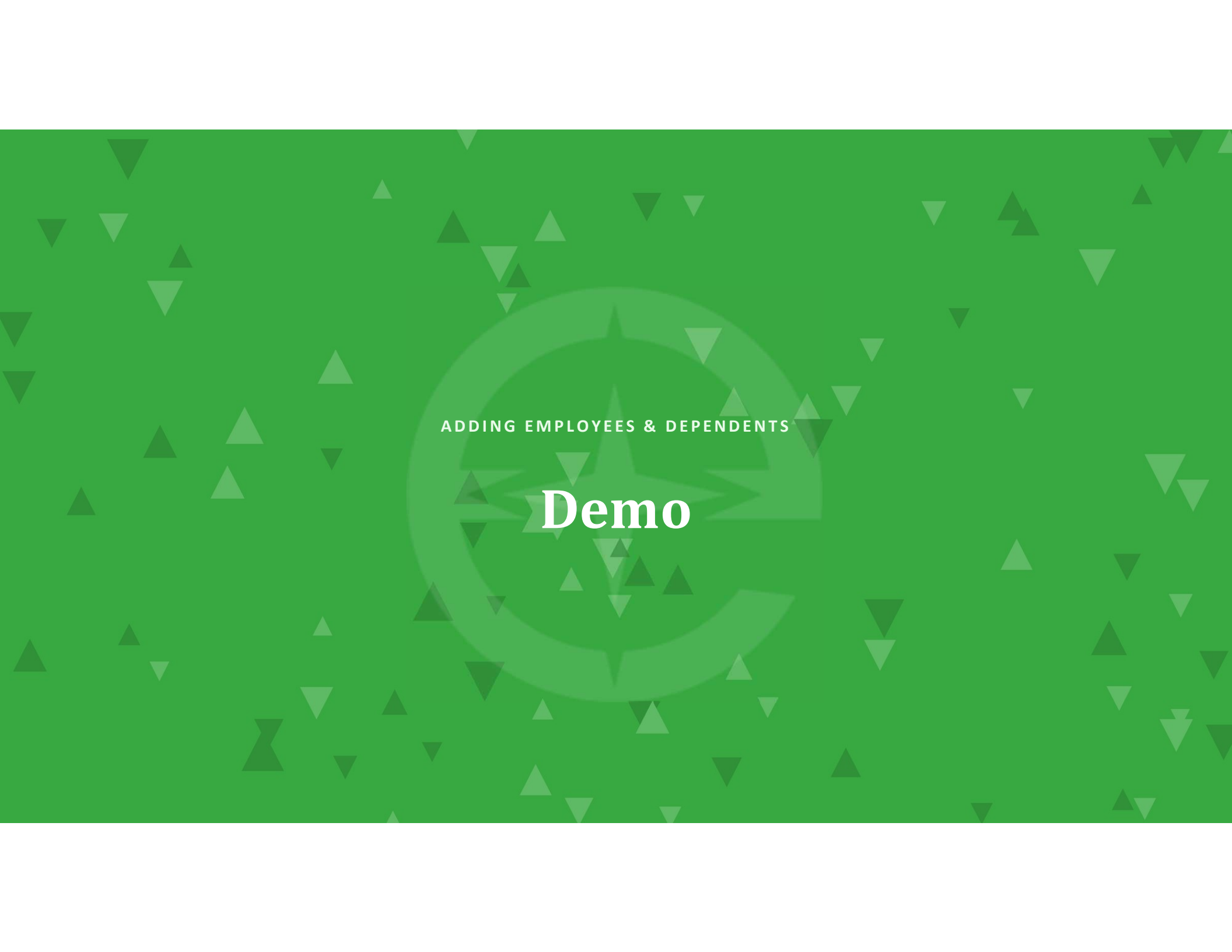
Bulk enrollment – key guidelines

- Plans must be activated & marked as required enrollment

Benefits › Enrollment Tools › Bulk Enroll

- Bulk enroll options:
 - Optional effective date
 - Don't automatically audit enrollment?



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ADDING EMPLOYEES & DEPENDENTS

Demo

SECTION 03

Enrollment management

03



ELIGIBILITY MANAGEMENT

Enrollment processing: which method, when

Data Exchange

EN's proprietary real-time connection with the carrier.

No Charge

Best when the carrier supports EN's direct API — fastest and cleanest.

834 EDI Files

Standardized electronic files sent to the carrier.

\$0.45 / ee / mo

Use for medical, dental & vision on legacy HIPAA 834 connections.

Carrier Forms

Auto-generated forms submitted to the carrier.

No Charge

When no electronic feed exists but forms are supported.

The Wall

Broker/HR notified to submit changes manually.

No Charge

Fallback when no integration is available for the carrier.



ELIGIBILITY MANAGEMENT

The Wall

1

Set up enrollment change tracking

*Triggers for manually processed plans only**

2

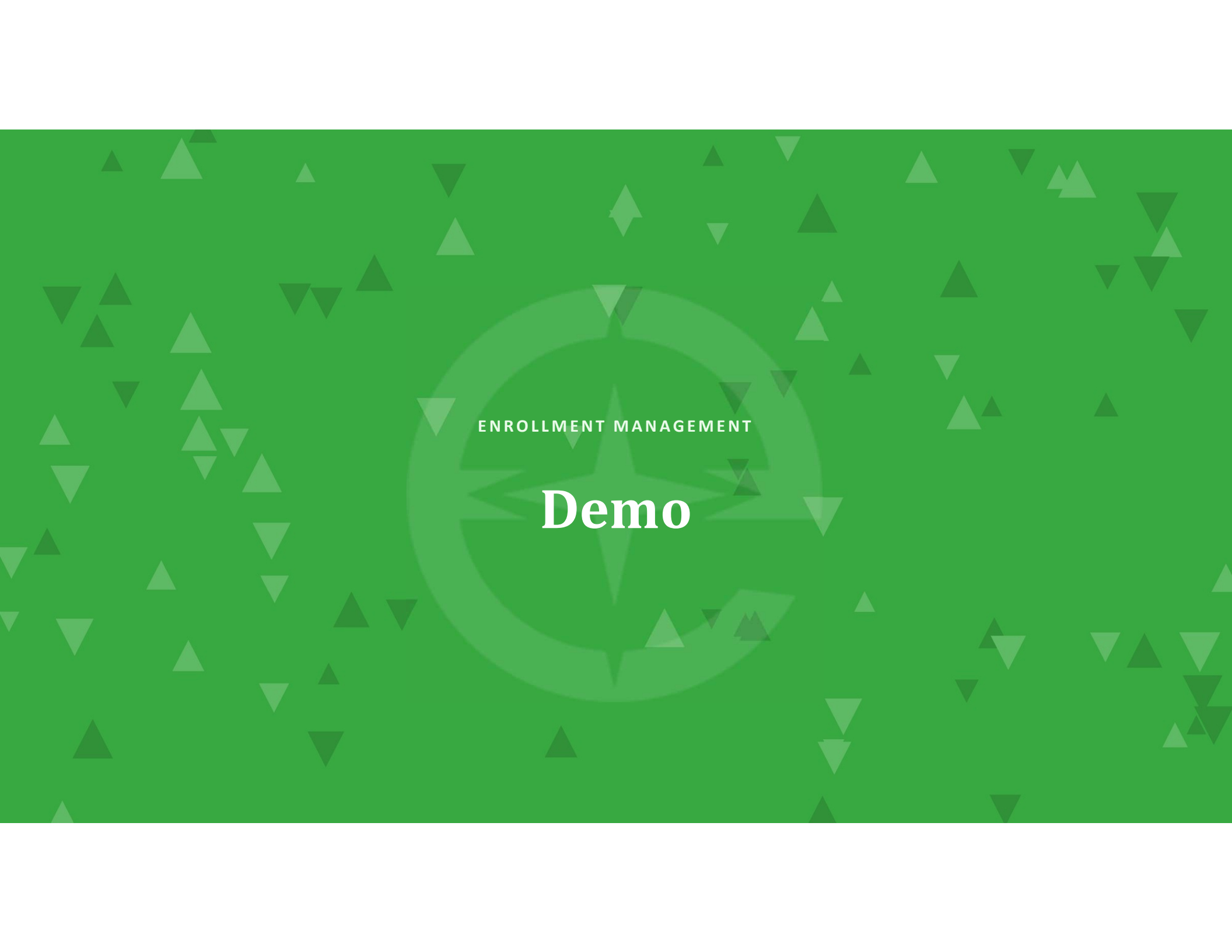
Allow HR users to view events

3

Tag who enrollment changes are managed by

**Processing Type (Policy Info tab) reflects how enrollments transfer to the carrier — it doesn't set up or create a feed. Switching it to automated before a feed is active will suppress event tracking.*



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ENROLLMENT MANAGEMENT

Demo

LOOKING AHEAD

Coming Up Next

Monday

- Configuring a company
- Establishing plan rules
- Setting up basic plans

Tuesday

- Setting up life and disability plans
- Setting up cafeteria and HSA plans
- Plan communication tools

Wednesday

- Testing the build
- Adding employees and dependents to Employee Navigator
- Enrollment management: manually & via integrations

Thursday

- Renewing and hosting open enrollment
- Daily HR management
- Employee Navigator's support resources





Q & A