Contents

Training & Support

Support Tools & Access

Top support articles to review for this topic

- Ongoing Support Options
- HR Training
- Training Workbook

1. **How can I get support from Employee Navigator? Can we request personal training?**
   Review our Ongoing Support Options article to find details on all training options.

2. **What is a Premier User and how are they different from non-Premier Users?**
   Premier users have access to call or email our team for additional assistance.

3. **I'm not a Premier User. How do I get support?**
   Online self-paced support is available through our Knowledge Base and EN University

4. **Can we add more Premier Users?**
   Contact support@employeenavigator.com for info on eligibility and pricing.

5. **What's the turnaround time on email support?**
   A response is generally within under 4 hours and resolution within 24-48 hours in some cases.

6. **Do you offer training for HR group contacts?**
   Yes, click here to see more information about live and recorded HR training options.

Agency Setup

Users

Top support articles to review for this topic

- Adding & Managing Licensee Users
- Teams
- Partner Invitations

7. **Is there a limit to how many agency users we get?**
   No, but we suggest reviewing your contract details for specific information about pricing

8. **Is there a way to organize users into Teams?**
   Yes, this feature was released in February 2024.

9. **How can we give users access to new companies added to the system?**
   You can do this via Teams or by assigning direct access while creating the company.

10. **What does 'View HIPAA Data' control?**
    Provides visibility to private data covered by HIPAA.

11. **Can we reduce the number of logins we have (System, Support, EN University)?**
    This is something we are working on, for now each requires a separate login.

12. **What if we are primarily using enrollers?**
    Enrollers can be invited into the system.

13. **When an enroller is assisting, can they enroll an employee if vital information is missing?**
    Only if the employee is missing *HR* required information as enrollers cannot add

Libraries & Templates

Top support articles to review for this topic

- Company Library
- Plan Service Library
- Rate Library: Small group ACA and composite rated medical plans
- Understanding the Marketplace

14. **Are there libraries from GA partners that we can utilize?**
    GA connections vary based on licensing, but not all GA's connected have a library available

15. **Is there a plan library we can pull plans from?**
There are three primary tools a user can access to pull in pre-configured plans. The information pulled in varies by tool. Our *Marketplace* offer some pre-configured plans, we also have the Rate Library that can be used. An agency is also able to create their own private library of frequently used plans.

16. **Do library plans automatically get removed after the end date has passed?**
No, the plan remains available until inactivated.

17. **Can you import a plan library using a template or do they need to be manually built?**
No, library plans must be built manually although plans can be copied up into the library

18. **Does each user need to create a library, or can they be shared?**
Libraries/templates are created at the agency level and can be shared with all agency users. The Plan Library is intended as a "neutral ground" reference that all users can access without interfering with each other's books of business.

19. **Can agency templates be used to set defaults in setup for all clients?**
Templates can be designed for communication and basic configuration using the Agency Library.

20. **Can we delete plans from the library?**
Yes, plans in a library can be deleted at any time.

21. **Do you have a General Agency arrangement to support our downline agents?**
We do support a General Agency license structure where individual brokers can be set up downline. Contact Sales@EmployeeNavigator.com for more information.

Miscellaneous Questions

Top support articles to review for this topic

- Agency Branding
- Employee Navigator Timestamp Conversion

22. **Can a custom URL be created with a company-specific logo at the top of the login page?**
Creating a custom login is license-based, please review the Agency Branding for details

23. **Can EN track commissions for every group entered?**
No

24. **Can we change the time zone of "our" EN?**
Check out our Employee Navigator Timestamp Conversion article to see which areas can be customized or are automatically converted.

25. **Is there a maximum number of employees that can be entered per company?**
No, there is not a limit to the number of employees that can be added to a company.

26. **Does EN allow a company to be transferred between agencies?**
There are some limitations, please submit a request to Support to check eligibility

Company Setup

Company Profile and General Questions

Top support articles to review for this topic

- Company Build Guidelines
- Adding a Company
- Company Profile

27. **Are there step-by-step instructions on how to add businesses, employees, etc?**
The Training Workbook and Company Build Guidelines articles are excellent resources.

28. **What information is required to add a company?**
Company Name, Company ID, SIC code, and stat are the fields required to create a company.

29. **Can I change the Company Identifier?**
A premier user can request Support assistance to update an identifier.

30. **Does adding someone as a *Contact* give them admin access?**
No, contacts are added for informational purposes. Consider this a digital "rolodex".

31. **How do you code a company as a "demo" company?**
A premier user may contact Support to request a company be marked as a demo.

32. **Is there a way to delete a company in EN?**
No, a company can only be inactivated and EN doesn't bill for inactive companies.

33. **Can we add additional custom fields to collect information from employees like shirt size?**
No, but this is an enhancement we are considering.

34. **Is there a template/checklist to show everything needed to get a company up and running? What are the minimum requirements for adding a company?**

Since every company is unique there is not a system checklist for creating a company. Our Company Build Guidelines article provides guidance on minimum requirements.

35. **Is there a particular order to set up a company?**
There is not a strict order. Best practice is to configure settings, payroll groups, default eligibility rules, plans, and then import employees.

36. **Does each group have their own login site? Can we create a custom domain?**
All users access the system through our main login page. Review our Login Widget and Agency Branding articles for more information on premium options.

Class Structure

Top support articles to review for this topic

- The Rules Engine
- Company Setup: Class Structure
- Rules for Dynamic Classes
- The Rules Engine

37. **Do you have to create classes for each company?**
Classes are not required but are a frequently used tool to help determine eligibility.

38. **Can you name your Class and Pay Frequency the same name? Will this cause issues?**
Yes, you can do this without issue as those are labels and can be updated at any time.

39. **When we add a group, is class information editable?**
Yes, the labels which can be changed at any time.

40. **If we have a large group with multiple offices, can we identify a primary office?**
Yes, these can be set up under Class Structure and can identify one as the "Primary Office."

41. **What are some examples of dynamic class uses?**
Check out our Rules for Dynamic Classes article for more details

42. **How can we add subsidiaries with separate EINs on a single employer?**
Business Units would be used to identify separate EIN groups within a single employer.

43. **How can I prevent enrollment when someone lives out of the area and is not eligible?**
Dynamic Classes can support eligibility based on City, County, State, and/or Zip Code.

44. **Can you delete a class structure if it was set up incorrectly?**

Class structure cannot be deleted although it can be renamed or inactivated.

Standard Payroll Setup

Top support articles to review for this topic

- Payroll Setup
- Company Setup: Class Structure

45. **When should I use pay frequency-vs-payroll tab?**
Pay frequency under 'Class' can be used to calculate employee deductions when a payroll group does not exist under the payroll tab. Creating a payroll group is required if CDH plans are being added, custom payroll dates are needed or when integrating with a payroll partner.

46. **If there isn't a payroll connection, is the payroll calendar required?**
Setup of the payroll calendar is required to create a Payroll Group to accurately calculate per pay deductions

47. **Can the system accommodate different pay schedules for different classes of EEs?**
Yes, there are no limits to the number of payroll groups that can be created.

48. **Will the payroll group override the payroll frequency setup in class?**
An employee's assigned Payroll Group will override any pay frequency assigned to the Class.

49. **What does Pay Date mean when setting up the payroll calendar?**
This should be the date the employee receives their check. It is not the date payroll is processed.

50. **Can we upload the payroll frequency?**
No, all that is needed is the first pay date of the calendar year. Our system uses the date to then populate prior and future year calendars. Adjustments can be made if necessary.

51. **If an employee works other than the hours noted in settings, will the system recalculate the benefits?**
Hours worked for an hourly employee can be adjusted, adjustments will recalculate the annual salary. Salary-based benefits are evaluated and updated per the plan rules.

52. **Can we customize the pay deductions? I.E. 52 pay period but only deducts from 48 pays?**
Yes, deduction dates can be customized by plan.

53. **Would we be able to finish the company part THEN set up payroll?**
Yes.

54. **Does HR have access to modify or change the payroll calendar?**

By default, yes. Restrictions can be applied to prevent HR from making changes.

Building Plans

General Plan Questions

Top support articles to review for this topic

- Plan model general rules
- Base Plan Setup Tabs
- Default Eligibility Rules
- Auto Drop Over Age Dependents
- Adding Videos
- Defined Contributions

55. **Does the system support using Youtube for sharing videos about each plan?**
Yes, by category, not plan. Our Benefits: Adding Videos article has more details to review.

56. **Is there a character limit in the plan detail sections?**
No, there is no character limit.

57. **How does the system handle a coverage tier change due to an auto drop dependent?**
The system updates the coverage level as needed when the drop impacts the coverage level.

58. **Does EN support eligibility based on zip code?**
Dynamic Classes can support eligibility based on zip code.

59. **Do eligibility rules need to be manually created in each plan or can we set default rules?**
Default Eligibility Rules are supported, use the link to read more about this feature.

60. **Does the employee have the ability to see a side-by-side comparison of benefits?**
Yes, a compare tool is available during enrollment.

61. **Can we capture details for declining coverage, name of other carrier, ID number?**
A decline reason is required but does not support requiring any additional information.

62. **Can brokers approve pending employee enrollment changes on HR's behalf?**
Yes, a broker can also approve these changes.

63. **Can we do a call center enrollment?**
Yes

64. **Does EN automatically update contributions based on years of service if set up that way?**
Yes, years of service change options are supported using Dynamic Classes.

65. **When a plan is offered to multiple employees but has different rules for eligibility or cost, do I have to setup more than 1 plan?**
No, our rules engine is designed to support multiple configurations within a single plan.

66. **Is a plan comparison only available when you create a benefit summary for each plan?**
It is always available to provide a cost comparison even if a benefit summary is not populated.

67. **Does the system show post-tax and imputed income amounts on reports?**
Not at this time.

68. **Is there pre-tax and post-tax designations for domestic partners?**
Not at this time.

69. **If you pull in an existing plan from another company, how does it affect rates?**
Rates will copy over if they were entered in the original plan that was copied.

70. **Can we suppress costs from showing on plans?**
No

71. **Can we upload rates via a spreadsheet?**
Only ACA rated plans support importing rates via spreadsheet.

72. **Can you support carrier specific arbitration language to be provided electronically?**
Yes, this is supported for CA arbitration. Please let us know if one needs to be added as this is set-up 1x per carrier for all customers in EN.

73. **Kaiser Requires Arbitration Agreement to be displayed when an employee is signing. How do you handle that?**
Kaiser Permanente Arbitration Language can be set up as part of the plan > policy info and will appear as a Disclosure in the enrollment process. The employee will be required to agree before they can complete the enrollment step.

74. **What if my plan has a rate guarantee? Should I set it up as 12-months and renew or extend the end date?**
Best practice is to set attained age plans as a standard 12-month policy and renew

75. **Is there a "custom plan" option to create your own kind of benefit plan in case we have a group with a pet insurance plan or something that isn't in one of the current plan options?**

There are options like the Linked plan and Universal plan that can be used. All plans would be built from the preconfigured plan models; however, it should be noted these alternative plans are often not supported on payroll integrations.

76. **Will plan details populate automatically if I import plans from the marketplace?**
Yes. This will vary by carrier since each carrier builds their own plans.

77. **Is there a way to batch approve all plans after creation (to turn on enrollment), so you don't have to click into each one?**
Yes, plans can be turned on in bulk.

78. **Does EN allow defined contributions for allowed benefit types to choose whether to apply the contribution to just the employee or additionally roll unused balances towards any enrolled dependents?**
Not at this time.

79. **How would Vol Life work if the group offers Vol Life through their main carrier & then Colonial offers Vol Life as a supplemental coverage?**
This scenario is supported as the 'main carrier' enrollment and the third-party app enrollment would be represented as different benefit categories.

80. **Do you have the ability to do benefit allowance for an employer contribution?**
Yes, we call it Defined Contribution and it is limited to medical model and HSA plans.

81. **Does EN have the ability to administer 401K plans?**
No, but we can collect some basic election data for them.

82. **If we take the time to build out all of the additional information for a plan, will it be available to copy over to other groups?**
Yes! When adding a plan, you will see the option to Copy an Existing Plan >> Another company.

83. **Can we add retirement plans to a group?**
Yes. This is a broad answer -- you may want to build a test company to ensure your “plan” works.

84. **Can the waiver reason be required?**
If an employee chooses to decline, the decline reason is required to continue.

85. **Is there a way to pick the order plans are viewed?**
Yes, a sort tool is available.

86. Is there any way to import plans to a group?
No, you cannot import plans, but you can pull down plans from your GA to make the process easier.

87. On the HSA, if the group has a mid-year renewal, will the system recognize all contributions for that calendar year, or only the plan contributions?
The system will recognize all contributions made within the calendar year (even if split between two off-cycle policy years) as long as the enrollment exists in EN.

88. For the Group Life benefit, it requires us to input a beneficiary to complete the enrollment if they are enrolled in that Group Life benefit - is this a setting that we can turn off to where we won't have to input a beneficiary to complete the enrollment?
We recommend checking this as being required because you will want to capture this in case an employee were to pass away. You can set this field to be required, optional, or not to appear at all within the Group Life plan build under the Enrollment Options Tab.

89. Do we have to deactivate a plan that was renewed?
When a plan is renewed, it will remain active until the open enrollment is closed out at the end of the plan year. The system will then automatically deactivate the plans and make the open enrollment plans current. There is no need to manually deactivate a plan that was renewed.

90. Can I add a Section 125 plan to my company in EN?
A Section 125/Premium Only Plan can be built as a Universal or Communication Only plan. This means that the plan can appear in the employee's enrollment experience and additional verbiage can be added to ensure employees understand the plan's function.

91. Why wouldn't you want the "Plan name" the same as the "Carrier plan name"?
Sometimes the Carrier Name can be long and confusing for employees. Plan Name can be the same as Carrier Name, but it is often simplified for employees to understand their options quickly and easily in the enrollment flow.

92. Can you add required notices that must be viewed before completing the enrollment?
EN supports including disclosure notices at the plan level.

93. Can you enter a little blurb when you create a benefit plan that will display for the employee when the employee goes through the enrollment process?
Yes, this can be entered for individual plans using the Plan Summary, or as a top-of-the-page message for the benefit category using Category Overview.

94. If the rate was based on when the employee was originally effective, would you still renew each year?

This is supported as a multi-year Issue Age plan in EN. When building an issue age plan, you would not renew the plan. You would keep one plan with an extended End Date and set the issue age rating method on the Policy Info page.

95. **Is there standard language for section 125, ex: “I agree to have pretax deductions”?**
Yes, there is. Noting today most Section 125 plan documents include language for auto enrollment pre-tax.

Basic/Medical Model

Top support articles to review for this topic

- Composite Rates
- Configuring ACA Rates
- Medical Contributions
- Plan Based Contributions

96. **What happens when an employee moves and is no longer eligible for their plan based on their service area?**
This depends on the setup. If eligibility was tied to the employee address, the system will not automatically drop coverage, but will display the employee as "enrolled but ineligible". EN will not automatically terminate coverage without some kind of notification/confirmation, or preconfigured settings.

97. **Are age banded plans always going to be entered as ACA?**
They're not required to be. There are four rate types available for medical model plans that can look at employee's age only, employee & spouse age (flat child rate), or rating each enrolled individual.

98. **What rate upload formats are accepted?**
Excel and .csv formats are accepted for upload in ACA rated plans only

99. **How many contribution structures can be set up?**
There is no practical limit.

100. **Can we refer to a base plan for contributions or is that a manual process?**
Yes, base plan contributions are supported.

101. **Can you duplicate the contributions for salary and hourly, rather than enter twice?**
Contributions must be entered manually.

102. **Can we set an ACA affordability rate in contributions?**

The employee contribution can be based on % of monthly earnings to match the ACA affordability rate.

103. **Will the system automatically calculate max contribution for ACA?**
Employee contribution can be set to base on % of monthly earnings to match the ACA affordability.

Life & Disability

Top support articles to review for this topic

- Life Insurance Plans
- Voluntary Life Model Plans
- Disability Plans
- Restrictions Setup
- Enrollment Tools: Bulk Enroll and Auto Enroll

104. **Can Vol Life and Vol AD&D be built as separate plans?**
Yes, these plans can be built independently and Restrictions Setup can be created as needed.

105. **Is there an auto-enroll button for employer-paid benefits?**
Yes, check out the Enrollment Tools: Bulk Enroll and Auto Enroll article for more details.

106. **Are employees prompted to complete EOI when electing over GI?**
If electing over GI, a new page for EOI will display in the enrollment flow. If an EOI form or EOI link is added to plan communications, that will also display on the page.

107. **In Vol Life, will the system calculate the deduction based on the amount approved pending the EOI results, or does it assume the amount as applied?**
Deductions will be based on approved benefit by default, but there is an enrollment option to display deductions based on the requested benefit. EN stores both amounts.

108. **For Vol Life, does an employee need to be enrolled for dependents to have coverage? I have a group where the EE does not need to be enrolled but dependents can have coverage.**
Our Voluntary Life model plans support an enrollment option to allow dependents to enroll without employees during manual enrollment. If integrating on the Carrier Data Exchange, carrier support should be confirmed before enabling this feature.

109. **Can you build Guaranteed Issue amounts based on age?**
Guaranteed Issue amounts cannot be based on age; however, Employee and Spouse GI reductions are supported for new hire and newly eligible enrollment.

110. **If the AD&D rate is on top of the life rate, is there a spot to list or add that?**

The combined Life and AD&D rate must be entered as a single value. (Be careful with integrations. Did the carrier build them as 1 plan or 2?)

111. **When an employee increases coverage on an issue age product, how does EN handle those premiums? Will EN calculate premium based on the differing issue ages?**
Issue age plans have different rate types available to support the carrier's rating method such as re-rating, stacked, or original issue.

112. **On voluntary life, is there a way you can set it so that an EOI is required if the employee waived the first year it was offered but now wants to enroll?**
Yes. Voluntary Life GI rules support a Late Entrant rule you can set to $0 for employee, spouse, and/or child if they did not take VL on the initial offer and wish to take the benefit on re-offer.

113. **Can you set a rule to require an EOI for all late entrants?**
Yes, this can be controlled in the Guarantee Issue section of the plan.

114. **Some carriers have a direct link to their EOI - does EN allow for that?**
Yes. EN supports Guardian and MetLife and is expanding to UNUM

115. **For child life coverage in the first 'X' number of days, how does that impact payroll when the rate is less for the reduced benefit?**
We understand many carriers offer a reduced benefit for newborns. After researching and discussions with our carrier partners, it was determined that all carriers will add newborns as of their DOB regardless of any child age reductions or "minimum age eligibility" rules. Our software is designed to do this as well. Our carrier partners also confirmed that they will reduce the benefit on their end, and that the cost of the child coverage is not changed even for the short period of time that the benefit is reduced.

116. **Regarding age reduction, is it correct to input exactly how the carrier has it? Does EN do that calculation differently? EX: 65% reduction but enter 35% in EN?**
You will input the percent the benefit amount reduces *by* (not the percentage of the benefit amount that they will receive).

117. **What happens when an employee's salary changes? Will salary-based benefit automatically update?**
Salary updates will trigger an update to the employee benefit automatically based on the rule setup in the plan.

Cafeteria/CDH Specific

Top support articles to review for this topic

- HSA
- HRA
- Cafeteria Plans

118. **Are mid-year hires permitted to elect the full annual amount?**
This is determined in the plan setup. EN supports allowing for a prorated or full election.

119. **How does EN handle the IRS max when the HSA plan falls under 2 calendar years?**
EN applies the current calendar-year IRS maximum based on medical coverage level (Ind vs. Fam). Even if Med and HSA are in separate enrollment windows, enrollment logic is enforced.

120. **I have an employer who front loads the HSA - are there other options other than per pay?**
EN supports multiple funding options, check out our HSA Plan Setup article for all options.

121. **Can the system cap the employer's contribution to $500 per month?**
Yes, a "Limit contribution up to" any $ amount for ER contribution level configured as a %.

122. **Does EN support multiple contingencies if a group offers different HSA contributions?**
Multiple HSA-eligible medical plans can be tied to an HSA plan, each with differing contribution schedules.

123. **Does EN recognize when to offer a med FSA vs a LIMITED med FSA?**
Yes, that logic is hard coded and based on enrollment choices.

Documents

Top support articles to review for this topic

- Managing Company Documents

124. **Can we attach an SBC (PDF or link) somewhere that the EE is required to view?**
Yes, documents can be set as required and will show in enrollment and in the compliance page.

125. **Can benefit booklets be created in EN?**
No, this is not a service that EN offers.

126. **Can we have employees sign that they received the SPD at the Enhanced Plus license level?**
Plan documents can be loaded to show as required when enrolling but an electronic signature will not be applied to the document.

127. **Can you require employees to view the SBC directly in the benefit selection section for certain benefits before they are able to finalize enrollment?**
SBCs can be added and flagged as *Required when* enrolling. This option will flag the document as a required task for the employee to complete but it does not have to be completed before finalizing their enrollment decisions.

128. **Does EN timestamp when an employee accesses the SBCs/EE Notices, POP Plan docs, etc? What if the employer needs to prove all employees received the required docs?**
Yes. Date and time stamps are recorded in the 'Views' tool on each document to show that a user opened a document and when.

129. **Would it be best practice *not* to copy documents when copying plans from another company?**
Yes. When you copy a plan, you can uncheck the box that copies over the documents to prevent those from being copied over if needed.

Testing & Troubleshooting

Top support articles to review for this topic

- Testing a Company Build
- Demo Employees

130. **Is there a way to have a test employee up while building so you can check things are correct while you are building?**
Yes. Unlimited demo employees can be added for testing. These employees have the same functionality as live employee records (register and log in as them, enroll, etc.) and are hard coded not to be included in reporting or integrations.

131. **If we don't add a test employee, can we just go to different employees and preview what they see for open enrollment?**
Yes, you can. You can always go to an employee's management page and access whichever enrollment windows are available to the employee to see how that looks as well.

132. **Does EN have an option to switch from broker view to "View as an Employee"?**
Yes, EN provides an employee view that is available to any admin user.

133. **Regarding test employees, can we always use the same info for each test employee for all groups (ie SSN, DOB, etc)?**
Yes – SSNs just need to be unique within the same company (i.e., the test employee must not have the same SSN as an existing or other test employee within that same company).

134. **Can we create a test or demo company?**
Yes, you can create a demo company just like any other live company. The functionality is the same, except email does not work.

135. **Can a demo employee have admin access for training clients?**
Yes! You can assign HR access to any demo employee, and they will have full HR capability as a live user would.

136. **Can you duplicate an employee in 'test'?**
There is not a feature to duplicate an employee in a test environment but you can create a demo employee and mirror the demographics as needed for testing.

137. **I added a test employee and went to my "Employee" page in the company - but see don't see this employee. I can search for them and find them, but if I didn't know what to search for, how would I see the test EE?**
Demo employees are prevented from surfacing on reports, but you can find a list of all your demo employees. Start by going to the 'Add Demo Employee' button and you will see a "List Demo Employees" option on the right. This will show all demo employees created under that company.

Importing

Top support articles to review for this topic

- Important Things to Know About Imports
- Import Templates
- Importing

138. **Can I upload salary changes for the whole group?**
Yes. Salary updates can be imported in bulk.

139. **Is there an option to upload a basic census for OE/new hires to by-pass some of these questions/add tertiary info/get them into the correct class?**
The import tool enables you to upload employee and/or dependent census data, demographic updates, and current enrollment data.

140. **Would we import employees first THEN add their enrollments, or is it all done when you upload enrollments?**
Yes, the employee and/or dependent census would be uploaded first, then enrollments in subsequent imports.

141. With the import of current enrollments, how do you *finalize* or *complete* the enrollment on the employee side?
Imported enrollments will not pend and are immediately valid. If the employee has an available New Hire or Newly Eligible window, an Admin can complete their enrollment summary on their behalf.

142. Can you import a template to enroll employees in all the plans at once as opposed to uploading a census for every plan?
Depending on the plans you are importing, they may require different templates. For example, our medical model requires different information than our Voluntary Life model due to the differences between these types of plans. For those cases, you will need to do separate imports. However, if you need to import enrollments under the same benefit category such as medical and vision, then you would be able to include that all on one import.

143. Will the system automap fields in my spreadsheet?
The import tool will try to automatically match column headers but when there is no logical match, the system will permit the user to map the column in the import process.

144. Do the column headings and formatting have to be exact on the import? Does the order of the columns matter?
No. You have the ability to map column headers and mismatched data to the appropriate EN fields after importing. At a minimum, the import census must include SSN, First Name, and Last Name. Other required fields vary by import type but the order of the columns does not matter.

145. Approximately how long does it take for a census to load?
Imports usually take less than a minute to load. Times may be a bit longer during OE and ACA seasons.

146. Can you import over Employees to make changes to all employees?
Yes, you can make mass changes through import to employees.

147. On the import, can you include the enrollment in current benefits?
You may import current elections using the Enrollment Import tool. This must be completed separately from the Employee Demographic Import.

148. Once you perform an import into the system, does EN have any capabilities for rolling back an import?
No. Once an import has been committed it cannot be undone.

149. If the employee data already exists in the system, will importing him again overwrite it?
Yes. Existing data can be overwritten with new information or blank fields.

150. **Can you make SSN not a required field for import?**
No, not at this time. Employee SSNs are a hard-coded requirement for creating the employee record but we are looking into allowing the employee to provide them during the enrollment process.

151. **When importing, will it create duplicates if you import everyone all over again?**
No, it will not create duplicates. If you import the spreadsheet again, it will overwrite the existing data.

152. **Do you have to build out Job Titles or will the system create them from an imported file?**
You can import Job Titles for individual employees.

Email Options

Top support articles to review for this topic

- Employee Navigator Email Default Text
- Changing Email Templates
- Bulk Welcome and Newly Eligible Emails

153. **Can emails be customized?**
Yes, email templates can be customized.

154. **Who do the emails come from? Can the sender be masked?**
All emails come from Employee Navigator, will have an @employeenavigator.com domain, and cannot be masked.

155. **Is it possible to enter a reply-to email for emails sent to employees?**
No, system-generated emails do not support custom senders for reply. This information should be included in the body of the email.

156. **Can you control what email/name the email would be sent from?**
No. This increases the likelihood of an email being identified as SPAM. Some email features allow for 'masking' of the sender.

157. **Can emails be sent with an attachment?**
No, at this time, only text can be included in the emails that come from EN.

158. **Is there a record of sent messages?**
Yes, the employee timeline will keep record of emails sent to the individual employee.

159. Do you have an option to see the email activity to let us know if the employee received and opened the email from the system?
We track transmission of an email to confirm it was sent, but we do not offer any additional tracking on delivery or receipt.

160. Can you see if an email bounced so you know to correct the email and resend?
We do not track bounced emails at this time. You can go to an individual's timeline to see what emails were sent to the email on file at the time of the email.

161. Are welcome emails automatically sent out to welcome new employees?
No, we believe a welcome email should be triggered only when the Admin is ready to send it. The welcome email can be sent individually or in bulk.

162. Can scheduled notifications be sent for new hires?
Automatic reminder emails can be scheduled to notify New Hire and/or Newly Eligible employees that their enrollment window is closing.

163. Can reminder emails get sent for employees that still need to log in and enroll?
Yes, automatic reminder emails can be sent up to 14 days prior to the end of the enrollment window.

164. For new hires added into the system, is there an email notification sent when the employee is eligible?
The initial notification/registration email is not automated and would be sent out as part of the Add Employee process. This can also be sent out in bulk if employees are imported. The email will provide any links and info necessary to register their login. Automated reminder emails can be set up to remind the employee when their window is closing soon (up to 30 days out).

165. Does the system have a text feature?
Text alerts are not supported.

166. When sending bulk emails, can you apply multiple filters at the same time?
There are various conditions to choose from, but you can only choose one at a time.

Creating HR Users

Top support articles to review for this topic

- HR Users and HR Permissions
- HR Access Controls/Restrictions
- HR Training

167. **A lot of my groups don't have an HR user. Is that ok?**
Yes, HR users are not required and can be managed by your agency.

168. **Please define who is HR - can it be the employer or payroll company?**
HR could be employer or payroll, but to add new hires, the user would be added to HR.

169. **What is the difference between UNLINK and REMOVE ACCESS for HR Users?**
Unlink leaves the username assigned to the HR account, *Remove Access* leaves the username assigned to the employee record.

170. **Can you limit HR access to specific information like salary and limit the employees they can access by location/division, etc?**
Yes, check out our article HR Users and HR Permissions for details on this.

171. **Is there a way to restrict HR user access to import?**
Yes, access to the import tool can be restricted.

172. **What does it mean if we check Broadcast emails, Note Emails and Manage Other HR settings (under the HR User > Permissions tab)?**
These permissions allow HR to receive an email when a user chooses to notify them through the 'Broadcast to HR' or Employee/Company Notes tools. Manage Other HR Settings allows the HR user to add/edit other HR users.

173. **The group HR/Admin usually adds new hires and terminates employees. Will EN be training them?**
Your agency is the primary trainer and support to HR but they have access to the Knowledge Base, Support Guide, and EN University

174. **How can HR navigate between the "work" profile and personal profile? Do they need 2 logins?**
They can toggle between views, they can select their name from the upper right corner and select *Switch to my EE page* from the drop-down menu.

Employee Management

Employee Login/Access

Top support articles to review for this topic

- Employee Registration & Login
- Tracking Employee Registration, Logins and Utilization

175. **Is there a way for employees to log in without an email?**
Yes, employees use a username to log in.

176. **Can the employee reset their password easily?**
Yes, employees have the option to reset their password from the login screen.

177. **Are we able to do a company wide password reset?**

178. **Does the system automatically log out an inactive user?**
Yes, for security purposes, you will be automatically logged out after 30 minutes of inactivity.

179. **Can we generate a temporary login username and password for the employee?**
For security reasons, we do not allow for the automatic generation of login credentials.

180. **Can we have more than one employee with the same email?**
Email addresses can be used as often as needed; only usernames need to be unique. In these instances we would recommend advising employees to register manually.

181. **Is there a feature that deactivates or locks an account if it has not been used in a set number of days?**
We only 'lock' an account due to too many failed login attempts not inactivity.

182. **Is there any preferred browser that works best with EN?**
For optimal performance, Employee Navigator recommends Microsoft Edge or the latest versions of Chrome or Firefox.

183. **Are we able to have multiple windows/tabs open on the same browser at the same time?**
While actively working in the same group, multiple tabs can be opened for the group in the browser. When navigating between multiple companies, a new browser would need to be used to support displaying information for two separate companies at the same time.

184. **Does Employee Navigator have a mobile app?**
Our site is designed to be mobile friendly.

185. Is single sign-on through Azure and others available?
Some payroll providers offer SSO capability, but this is not an option through Asure.

186. Are we able to see an employee's username and reset passwords?
An employee's username is visible but for security passwords cannot be viewed.

Employee/Company Notes

Top support articles to review for this topic

- Employee and Company Notes

187. Can notes be added to an employee account? Does the employee get an alert when a note is added?
Admin users can add notes on an employee's account. Sharing is optional.

188. Can notes be deleted?
No, to preserve data integrity notes cannot be edited or deleted, but visibility can be controlled.

General Questions

Top support articles to review for this topic

- Assign Coverage Tool and Unlocking Enrollments

189. Is there a way to turn off requesting ssn?
SSN is required for all employee records but SSN for dependents can be optional.

190. Is there an option to override an effective date?
Yes. The Enrollment Editor can be used to override an effective date.

191. Can we turn off Annual Benefit Salary from an agency (and just use the Annual Base Salary)?
Yes. The Annual Benefit Salary is an entirely optional field. If you do not enter a value, the system will look at Annual Base Salary by default.

192. How can you override a new hire eligibility date in case someone missed theirs?
If an override is needed, that can be done using Enrollment Editor. An Unlock tool is also available to extend an enrollment window on an individual basis.

193. Can you search by dependent name?
Yes, the advanced search tool allows you to search for dependents by name.

194. **Will EN allow us to input hours worked per week such as 37.5?**
Yes, hours worked per week can be entered with up to two decimals.

195. **Does an employee still see the dependent on their profile if there was a divorce or death?**
Deceased dependents and Ex-Dependents are not visible to EEs. They are visible only to HR and Admins

196. **Do beneficiaries have to be entered as dependents?**
No, they can be any individual or entity.

197. **How does an employee change their beneficiary? Is that a life event?**
From their home page, the employee can click on their Enrollment Summary tab. From there they would see a Beneficiaries option on the left. Clicking on that would allow an employee to add or edit a beneficiary. This would not need to be a Life Event.

198. **Once an EE completes their elections, does it automatically email the EE a summary of their deductions?**
An enrollment confirmation is automatically sent reminding employees that elections can be reviewed at any time in EN.

199. **Can we finalize/sign off enrollment on behalf of the employee? Can this be done via an import?**
Yes, admin can complete enrollment on behalf of an employee whether done manually or through an import.

200. **Is there a "feedback" capability for an employee who has completed OE so they can comment on OE process and level of satisfaction?**
Not at this time.

201. **Are we able to change the Benefit Eligible Date for an employee?**
Eligibility dates are calculated automatically based on plan configuration. Employee Effective Dates can be edited when necessary.

202. **Is the portal available in Spanish?**
Yes, in the event that an employee wishes to review the site in a language other than English, we have added Google Translate to our services as an option.

203. **Can employers add new hires?**
We would 100% expect the HR/ER to add new hires as a best practice. Any admin can add new hires - manually, in bulk via import, or automatically through a payroll integration

204. **Are there safelist instructions that would need to be sent to the employer's IT so that emails don't go to spam from EN?**
Yes, there are whitelisting instructions in our Help Center.

205. **Isn't there a way to add employees one by one directly in the system without the need to download a template or having a csv file?**
Yes, absolutely. Agency users and HR Admins can add employees individually.

206. **If I can't use a dummy SSN, what about employees that are here on a visa or dependent newborns?**
SSNs are only required for employees and their 9-digit visa number can be used as a substitution. If a 9-digit numeric value is not provided, we do not recommend adding the employee to the system. We do not require SSN data for dependents, so a newborn can be added without this information and added once assigned.

207. **If the group does not offer Compensation based plans, is there a way to bypass the compensation?**
Compensation is not a base required field in EN. If a group has no compensation-based benefits (and is not integrating with a partner that requires that field), it can be excluded entirely from the employees' profiles.

208. **Is there an option to allow disabled dependents over age 26 to keep coverage?**
There is a hard-coded exception in EN if a dependent is marked as disabled. They will not be dropped from coverage.

209. **Do dependents need to be added to display dependent rates?**
To properly provide dependent rates, in most cases their data is needed.

210. **If I add a dummy SSN to an employee, then the employee later gives me the real SSN, how do I change the SSN?**
Admin users can edit the SSN on the employee profile, and this must be done for integration.

211. **Is there a way to transfer employees between companies without loss of status (ie when there are two commonly owned entities and an employee moves from one to the other)?**
This is dependent on how the groups were set up.

212. **Is the undo termination function only available in a limited timeframe to make that change?**
You can process an undo termination at any time.

213. **If an employee still needs to complete an EOI, is there a notification that shows on their dashboard?**
Yes, it shows on their home page under Your Notifications > Pending Health Question Review.

214. **Can an employee attach an enrollment form back into Employee Navigator?**
Yes, employees can upload documents through the custom tasks with the Onboarding Tasks tool; however, Onboarding is available with Elite and Platinum licenses only

215. **When processing a termination, if the employee has no address on file, how do you terminate them?**
An address is required to process an employee termination so the COBRA letter can go out. An ounce of prevention is worth a pound of cure.

System Reports & Activity Notifications

General Reports

Top support articles to review for this topic

- Reporting
- Row and Column Based Ad Hoc Reporting
- Managing and Sharing Saved Report Templates
- Cross Company Reports

216. **Does EN have the ability to pull data "as of" a specific date versus the effective dates?**
Yes, EN is a point in time system and dates can be used to determine the reporting period.

217. **Are there reports which can pull data from all companies in EN?**
There are cross-company reports at the agency level, specifically the Client Plans report, to see overall plan info like Plan Year Begins/Ends, # Eligible, # Enrolled, # Open Enrolled

218. **Can you run a change report of all changes during a certain time frame?**
Yes, there are change reports available at the company level for Demographic Changes or Enrollment Changes that can be run based on changes that have occurred between a specific time period

219. **What happens if we have to send a signed form to the carrier for them to manually process the enrollment?**
EN offers a universal enrollment form; however, custom carrier forms are not available at this time.

220. **What if we have to send a signed form to the carrier for them to manually process the enrollment?**
Form mapping is not currently a feature available in EN. This enhancement is top priority.

221. **Are there ways to get an enrollment summary showing contributions/ payroll deductions?**
The Enrollment Summary will display elections and employee deductions per pay period.

222. **Can you print the actual enrollment apps to be signed already pre populated with the employees information and elections or does it only print a summary to be signed?**
The enrollment applications/forms are not yet available to be pre-filled. Form mapping is an enhancement that is top priority.

223. **How do enrollment for benefits get processed if there are no enrollment forms and no integration?**
Manually by an admin user keying data in the carrier system or sending a spreadsheet

224. **Do reports help provide data needed for the RXDC reporting?**
This info can be accessed by running our W-2 Summary report and summing the totals for all employees. This is an enhancement we're currently tracking to provide the most efficient solution.

225. **If an employee uploads a document, can an HR person get a notification that they did that?**
This is part of onboarding tasks. There is a Wall trigger that will notify HR (company Wall) or Brokers (agency Wall) if a workflow document has been uploaded as part of an onboarding task. Note: Onboarding is available with Elite and Platinum licenses only.

226. **If they upload that document and it shows on the wall, is there a report that they would be able to print to show what and who has uploaded?**
The Events Report would allow you to see which employees uploaded a document within a specified timeframe, however, there would not be a way to download documents in bulk from various employees' records. (I'm sure you're sick of hearing this) this is an enhancement we're currently tracking!

227. **Will EN alert us when a dependent will be turning 26?**
No. The system automatically drops the dependent and COBRA will be offered with integrated COBRA TPAs.

228. **Is there a way to see when HR / Broker / Enrollers are the signers for an enrollment?**
Yes, changes are tracked and will display "who" made the change.

229. **Is there an estimated date for when forms will become available?**
This is an item we are actively working on, the update at this time is sometime in 2024.

230. Can I run a report to find changes at the agency level for all my companies?
There is no broker-level report so this will need to be pulled within each group. However, our wall feature allows the agency to receive notifications about important updates to employees/benefits.

231. Are cross-company reports available?
Agency-level reporting provides some cross-company reporting.

232. Is there an annual contributions report?
EN offers reports that include annual contribution including the W2 Summary and Insurance Costs reports.

233. Can you generate a report of who has viewed a document?
Yes. We create a digital paper trail.

234. Are payroll reports and/or configuration reports available?
Payroll reports are available. Certain configuration reports are available, though they may vary in information.

235. Do you have a compensation report?
Yes

236. Can we make custom reports?
Yes. These are called Ad Hoc Reports in EN and they can be shared with HR.

237. Are certain reports only available with certain EN pricing packages or available to all?
Everything on the Reports tab is available to all license levels. Any reports that would be unavailable to the Enhanced or Enhanced Plus would be housed on the PTO/Tasks tabs because they would be specific to those products.

238. Depending on how it's check marked on the Ad Hoc page is how it will be ordered on the census?
Yes, fields are displayed in the order they are selected. When you need to rearrange your columns, you'll use the link to 'Reorder Selected Fields' and you can drag and drop where you need the fields to display. This is helpful when creating a template to match a carrier's report.

239. If I run and/or create a report for a company, can the company admin see that report as well?
You can share report templates with both agency and HR users. They will see the template or report "structure", but the data will point-in-time when they run it.

The Wall

Top support articles to review for this topic

- [The Wall – Wall Feed Setup]
- [The Wall – Agency Wall Dashboard]
- [The Wall – Company Specific Agency Wall]
- [Automatic Reminder Email Notifications]

240. Do walls have to be configured every time for each group?
Can be created as a 'template' in your library; an agency can add multiple groups to the feed.

241. Can we set up the wall so that it only notifies the company admins or does the wall only notify the brokers?
There is a Wall at the Company level (for notifying HR users about a single company) and the Broker level (for notifying Broker users about one or more companies).

242. Can you receive notifications weekly, or is it only by the hour?
Wall notification frequency options are every 1, 2, 4 or 8 hours.

243. Does this wall need to be configured for each individual user? Also, is there an audit log of tasks that have been completed (who did them and when?)
The wall setup can be shared with multiple users at the agency or company level. Reporting is available on task completion.

244. Do you offer an employee summary report that shows the digital signature with the date?
Not at this time. Digital signatures are not a federal requirement.

245. So we can customize that our health broker partners (Medical) get certain notifications while our internal team gets different notifications (VB)?
Notifications can be benefit, event, or carrier specific.

246. Is there a filter to turn on for notifications for age changes?
No, but reporting is available for age changes.

247. Can we set the Wall up for Agent use only, and not allow the employer to have access to process?
Yes

248. What happens when a checklist is marked as completed? Is there history of who completed a checklist item?
Once completed, a checklist task is moved to a 'Complete' status. Historical reporting is available on all complete tasks.

249. **Can I run a report to find changes at the agency level for all my companies?**
There is no broker-level report so this will need to be pulled within each group. However, our wall feature allows the agency to receive notifications about important updates to employees/benefits.

250. **Is there an Activity report? I can run it agency-wide or individually by company. Will we have such a report?**
EN offers a variety of reporting tools that allow you to track activity within an account.

251. **Can you pull a prior benefit confirmation statement with a prior signature date or is it just current?**
Benefit confirmation statements are only available for current and open enrollment benefits. Signature/date are not included in benefit confirmation statements.

252. **Do you have an overall change report that will produce all of the changes for all of the groups?**
No, there is not a single report available to provide changes across all companies.

253. **Is there a way to see Bell Notifications on a bigger screen?**
No, the 'View details' button will however redirect the user to the full article in our Help Center.

254. **Does EN provide notifications about approaching renewals and end dates that need attention?**
No, but reporting is available to provide a complete list of plans including the plan end date

255. **Is there a summary of enrollments that an HR can pull and keep on record of the employee with a verified enrollment, such as an electronic signature?**
Benefit summary reports are available but do not include electronic signature.

256. **Is there any option for digital signatures?**
Yes, the system will automatically apply an electronic signature on behalf of the employee on the Enrollment Summary and universal enrollment form. The Onboarding Tasks tool also supports requiring the employee to electronically sign. Note: Onboarding is available with Elite and Platinum licenses only.

257. **When forms are added, will employees have to draw an actual signature instead of e-signing?**
This enhancement is currently under review. Form mapping is an enhancement that is top priority.

258. Will you create a universal termination form? There are only about 7 carriers (small group) that require a carrier specific term form.
The Ease form library is at the top of the suggested/priority list during the transition. We are not sure if carriers would embrace this type of form. More information to come on this!

259. Will all broker users see [system bell] notifications? or just the licensed dedicated user?
Notification visibility is set by user type (Broker, HR, Vendor, etc). The "dedicated user" or Premier User assignment only means access to phone and email support and does not affect system access or visibility.

260. Is there a way to see a whole list of all active employees in a group?
Yes - the Ad Hoc report is one way you can do this.

261. Can brokers work without the EDI feeds or it's a must/ is there an alternative to 834 EDI feeds for non integrated carriers?
You do not need to have an integration to use the system. The alternative would be to use the EN manual reports and communicate that information to the carriers directly.

262. Does the system create "statements" that take into consideration current salary and what the employer contributes towards benefits based on their elections? Shows overall compensation
Yes, there is a total compensation statement.

263. Will 'end date' and 'decline reason' get rechecked automatically after manually removing them?
Yes, those fields will be automatically checked if you add additional fields. This is intended to prevent a common error with including withdrawn enrollments on a report but not excluding those enrollments. You can uncheck those last and they will not be included.

264. Can the HSA & Retirement reports flag an over-contribution?
No, however, EN has a preconfigured report for Employees contributing over HSA limit (usually when they're imported, or passive enrolled which overrides the system logic).

265. Will I get an email when an employee has a QLE?
You can create Wall notifications for qualifying events.

266. Is this Wall only associated with each individual account?
A Wall feed can be set up at the Company level or at the Agency level. If you set it up at the Agency level, you can add multiple companies to the same feed.

267. **Is there a way to send automatic Happy Birthday and Happy Work Anniversary emails from the system?**
No. While there is no automated communication, the "List" on the group's home page will show upcoming birthdays and work anniversaries for the group to be able to send their own communication.

COBRA & QLEs

Top support articles to review for this topic

- [Life Events: Configuration and Management]
- [Profile Changes & Life Events]
- [COBRA: Data Exchange Overview]

268. **If an employee has a qualifying life event, can they upload their loss of coverage document on EN?**
Yes, employees can upload documents to support QLEs through the Onboarding Tasks tool. Note: Onboarding is available with Elite and Platinum licenses only.

269. **Is the system locked down for QLE until either we as the broker or the HR opens it?**
We have visibility for certain QLEs set by default so some are already visible, but this can be edited for each company to control visibility to QLEs. You could restrict access to QLEs and require employees to go through their HR/you, but we would recommend making them Require Approval instead so the employee is accountable for their requested changes.

270. **Can qualifying events be set up to auto approve?**
If QLEs are "auto-approved," you would just edit the QLE configuration to remove the "Approval Required" setting. This means the change would be active as soon as it is submitted. Keep in mind, this will not pend if an HR or Admin processes the event, even if the event requires approval -- the system knows the admin is processing and approval is implicit.

271. **How do you do "Severance" - employee was termed, but as part of the severance, they should be on the benefits for "X" more months?**
The employee will be termed in EN and the severance payments for COBRA should be managed by the COBRA TPA.

272. **Can you prevent certain life events from appearing in the employee view?**
Yes. This can be customized by company.

273. **Can we have employees contact HR first during QLE and provide required documents before making changes in benefits. HR can then unlock the system for employees.**
No, but you can pend life events for HR approval.

274. **Is there any way to see who has not completed QLE elections?**
You will be able to tell what was selected or not selected via the timeline/datasheet.

Open Enrollment

Setup & Communication

Top support articles to review for this topic

- Open Enrollment: Start Here
- How Passive Enrollment Works
- Concerns with Passive Enrollment
- Open Enrollment: Reporting

275. **During OE, will the employee be able to compare plans from the prior year and see their changes if the group changed carriers?**
Yes, if loaded the employee's current election will show and be included in the comparison tool.

276. **Can we schedule the initial OE notification email?**
No, the initial OE notification email is sent manually.

277. **Can we extend OE for certain employees, or do you have to extend the entire OE?**
Yes, the window can be extended for everyone or on an individual basis using the Unlock Open Enrollment tool.

278. **Most of our clients do passive OE's. How do we handle enrollments at renewal from previous plans?**
Passive enrollment can be supported within EN, but it is not recommended.

279. **If you use passive enrollment and the system pushes those enrollments but a week later the employee says they didn't want it, what election sticks?**
Active elections will prevail over a passive enrollment.

280. **Is there a way for EN to flag when an employee was passive enrolled?**
Yes, there are fields that can be included in reporting to identify passive vs active enrollments.

281. **Do I have to reset the open enrollment progress?**
EN does not require progress reset at Open Enrollment. This is an automatic feature during Open Enrollment.

282. If you do not push the passive enrollments first, what does that look like for employees?
If passive enrollment is not pushed prior to employee access, employees will see that no selections have been assumed on their behalf.

283. Can we renew multiple plans at the same time?
No, plans are renewed individually.

284. Can a tax year enrollment window be opened for HSAs that are entered to match non-January plan years?
While a second Open Enrollment session could be hosted (Ex: 1/1 for HSA; 6/1 for Medical), our system also has life events preconfigured to support mid-year changes to HSA (and other Cafeteria based on IRS standards as well).

285. How would passive enrollment work for employees not accessing the system during OE?
You have the option to 'push' existing enrollments into the new open enrollment plans. This option is available when renewing plans or after OE is completed.

286. What happens when open enrollment and new hire enrollment is the same date?
When a new employee becomes eligible for benefits and their initial offer eligibility date coincides with or after the active OE effective date, this employee will make their enrollment selections through the active Open Enrollment window with all existing employees. This ensures the user experience is clear and consistent, reporting is consolidated, and enrollments can be transmitted to carriers in a timely, accurate manner.

287. When you open OE, will the employees get notified then, or can we wait and send an email notification later?
Employees do not get notified that OE is activated. They will not get notified until an email is sent manually.

288. What if you have different start dates for different lines of coverage?
If you have plans with different renewal dates, then you will need to create separate open enrollment sessions. Each open enrollment session can only host one effective date and you can only have one open enrollment session active at a time. We recommend implementing short plan years to fix this inconsistency.

289. Can we run a report that indicates all employees that received an OE notification email, rather than go into each EE record?
There is an Event Report that can be run for a specified data range and the timeline event "Open Enrollment Notification Email Sent". This will show all employees that were sent an email; however, it does not confirm the email was delivered and/or read. We are working on an enhancement of the email platform in 2024 to support this functionality.

290. **Are login guides available to download to notify employees of OE?**
EN has a starter kit that includes an employee enrollment guide PDF that can be shared with employees. This will not display specific employee login information.

291. **Does the OE email notification expire after a certain period of time? Do you get a notification of that expiration?**
The registration URL for OE does not expire. Only the New Hire/New User registration email, has a 15 day expiration period.

HR Products

Onboarding Tasks

Top support articles to review for this topic

- Onboarding Product Overview
- Create and Manage Tasks and Versions

292. **Can we create custom documents for review and signature for onboarding?**
Yes. Onboarding features including employee tasks are available with the Elite or Platinum level licenses.

293. **What if it's something like employee handbook - can you make it mandatory even if not enrolling?**
Onboarding features including employee tasks are available with the Elite or Platinum level licenses.

294. **What is Recurring Task Management and Enrollment Assistance Tools?**
This Elite/Platinum tool that allows HR to assign "recurring" tasks to employees.

295. **Can employees sign I9 and W4 forms?**
Employees can electronically sign W4 but not I9 forms using the Onboarding feature included in the Elite or Platinum license levels only.

Integrations

834 EDI, Third-Party Apps, Data Exchange & Carrier API

Top support articles to review for this topic

- Data Exchange Overview
- Third Party Apps: General Overview
- 834 EDI Tool Overview
- Partner Configurations: Broker Instructions

296. **Are there medical carrier connections without the 834 fees?**
There are a few select carriers available through the data exchange for medical. We need brokers to call their carriers and push them to integrate with EN.

297. **Can you use a third party to do the 834 for more complex cases?**
Our Broker Support partners offer services to support 834 builds and much more.

298. **Are there employee size requirements for Carrier Integrations?**
There are no size requirements enforced by EN. We suggest contacting your carrier to confirm their requirements.

299. **If we have a carrier connection set up and there is a pending EOI, when the EOI is approved on the carrier's end, would the approval feed back to EN?**
Receiving that information from the carrier is not yet supported. EN's focus was to get the medical underwriting in front of the carriers first and let the underwriting division be communicated via existing means. We will be adding this functionality once available.

300. **Is there a focus on bringing on major medical carriers to the API setup?**
Yes, however, carriers allocate resources for integrations based on brokers' efforts, not EN's. Please reach out to your carriers and tell them to get integrated with EN to make your life easier!

301. **API - Can the plan rules be edited once received?**
No, these will be locked down based on the carrier's determination, but you can build a plan from scratch and mirror the rest of the data.

302. **API - Does this cost the broker anything to use?**
No

303. **API - Will the workflow be different for current vs. new clients?**
Yes -- the carrier would need the data accessible. Some carriers do not have this data early enough for new business vs. existing business, so the new setup process will vary from the existing process. At this time, however, we do have a tool that compares the plan built in EN with the carrier's plan.

304. **API - Is there a focus on bringing major medical?**
UHC USP in production; Anthem in the works. Other carriers and quoting partners to come!

305. **Is the API open? We have a TPA side that would like to feed data to our in house system.**
No. This would be part of a larger conversation about potential integrations. Please contact us if you are interested in setting up an integration that is not yet available.

306. **Is the API feed for large group plans only?**
No. Please check with your carrier directly if you want to confirm a specific answer.

307. **Is there a PEPM cost for API?**
No

308. **Will EN allow employees to bridge to Everwell once for all available plans, or must they continue to bridge once for each line of business?**
Employee elections are bridged to Everwell by plan.

309. **If the carriers are already in EN, how do we go about getting them connected with API?**
These instructions can vary slightly, depending on the carrier. We recommend you see the individual Broker Instructions for API enablement instructions.

310. **Can we edit things even if using the API? Say we prefer dynamic classes for eligibility.**
Classes and eligibility are separate, and you can use any combination to define eligibility, etc. Note that some fields that are set by the carrier, such as waiting periods, will not be editable.

311. **Can you set up two different ER Contributions for a Colonial Product that is using a data feed?**
Third-Party App products (usually individual coverage) do not support ER contributions. If using the Data Exchange (group products), contributions can be defined using class structure in the plan build.

General Questions

312. **Is there any data checking for integrations such as automated discrepancy reporting?**
No. Discrepancy testing and reporting is provided by the carrier.

313. **Does EN generate "tasks" with discrepancies with integrated partners?**
No. Some carriers offer alerts for error reporting

314. **If the carrier pushes it back as unacceptable data, does EN get notifications we receive?**
No, the carrier is the primary point of contact for data testing/errors.

315. **Each carrier needs its own connection for each client? We cannot just set up one carrier for all clients who have it?**
Individual connections are made per carrier per client because testing and setup are required by the carrier for each company and each product code in a customer.

316. **What is the typical ETA for an integration setup?**
This depends on customer and carrier responsiveness as well as group complexity and discrepancies.

317. **How does that affect feeds if it was edited a few days later, or on another day after a feed was sent?**
The discrepancy will get fixed on the next feed to the carrier.

318. **Since you don't have mapped forms, do you have more connected carriers for feeds to carriers?**
EN supports almost 300 Marketplace connections with more continually being added.

319. **Can you talk through the available employer facing HR platform partnerships on EN? Ex: Mammoth, Ease HR, etc.**
Mammoth will be added in 2024. EN has an active integration with Express Evaluations.

320. **Will you be adding "Rate Quoting" for renewal options for employers to review?**
We have a few quoting partners and will be expanding these.

321. **Is there a list of carriers that are already connected?**
Yes, all Partners can be found on the Employee Navigator Marketplace. Partners with active connections are indicated by a green "link" symbol.

322. **Can you please confirm that the broker is responsible for setting up the integrations?**
Yes; however, the HR admin will need to be available to assist with Payroll integrations as there is some information that only the HR would know (and not solely the broker).

323. **Our broker's office is a licensed TPA. How can we get added to your system?**
If you are a TPA interested in working with Employee Navigator, please reach out to the contact Laura Dirlam: Email ldirlam@employeenavigator.com or call 301-242-3211

324. **Are there fees for NOT activating an integration when it is available?**
No, we do not penalize or charge a fee when an available integration is not activated.

Integrated Payroll

Top support articles to review for this topic

- Payroll Integration Overview
- Who we integrate with and how to contact Partners

325. **With payroll API integrations, will the compensation screen update the payroll platform?**
When a company is integrated with a payroll partner, payroll "owns" certain fields. Compensation would be a field that payroll owns, so edits would only be made in the payroll system and they would feed automatically to EN.

326. **With payroll integration, are new hires in payroll automatically imported into EN?**
Yes. When integrated with a payroll partner, all new hires are added to the payroll system to then feed over to EN automatically through the API.

327. **Can the payroll file feed be limited to prevent changes in demographic data so that the payroll system can be validated and the source of truth?**
Each payroll provider has a distinct flow of data between the two sources.

328. **Is there a way to request a Payroll system be added to the marketplace?**
Yes, please talk to your payroll provider.

329. **How is a 30 day late enrollment impacting deductions as it pertains to the feed to payroll and how are deductions adjustments made?**
EN does not send retro deductions, and deductions are only sent once when there's a change. Each employer handles retro deductions differently, so we believe the best practice is to allow HR to handle these directly in the payroll system.

330. **Can you bring in the employees using a payroll integration?**
The initial demographic census must exist in both EN and the payroll system and will be audited during the integration process to ensure both systems match. After the integration is live, all new employee records will feed from the payroll provider to EN

ACA

1094/1095 Reporting

Top support articles to review for this topic

- 1094/1095 Form Generation

331. **Does EN have 1094 & 1095 B reporting capabilities for our level funded clients?**
Yes

332. **Is ACA 1095 Reporting done in EN?**
Yes - In the EN platform we will populate ACA codes based on the enrollment data you have in the system and ACA regulated guidelines. You will have the ability to review and make any changes you and/or your tax specialist sees fit. We integrate with Nelco, which is our 3rd party platform where you will be able to satisfy your filing and mailing requirements for ACA reporting.

333. **Is there a cost for ACA reporting?**
There is a per form cost based on the size of the company and the services provided. The fees are available online and updated each fall.

ACA Setup / Variable Hour Tracking

Top support articles to review for this topic

- ACA: Start here!
- Measurement Periods

334. **Is it a 'must' for a company to have integrated payroll for effective ACA reporting?**
No. You will just want to make sure that your data is up to date and accurate for effective ACA reporting.

335. **How do you set up a class for Variable Hour employees and how is eligibility determined (initial and standard) for them?**
This is managed through the ACA product. ACA classifications are assigned to employees to determine eligibility (Eligible, Variable Hour, Ineligible). For Variable Hour employees, hours worked are imported to track employees during their New Hire and Ongoing measurement periods. Plan and system configuration is needed to fully enforce variable hour eligibility. Step-by-step instructions and links to live training recordings are available on the Help Center, linked here.

Sales & Marketing

Demos

Top support articles to review for this topic

- Sales Starter Kit

336. **Demo that is HR or group facing - is there one that we can have or use When we are presenting to a group to go virtual? Meaning a short 2-3 minute video we can share**
Recorded HR Training Webinars are available on the Help Center. Shorter intro videos are available on our YouTube and/or Vimeo channels

337. **When "sharing" the idea of EN with potential clients - is there a short 2 min video we can use?**
Our Help Center includes a Sales & Marketing Starter Kit with product sheets for employers and employees, links to our Vimeo and YouTube channels, and templates for PowerPoint and email. The Vimeo link for 'Employee Navigator - All-in-one benefits, HR, & Compliance," linked here, is less than 2 minutes.