



Day 1

Welcome

- Our vision & what we're working on
- Support resources

Add a company

- Basic company configuration settings
 - Profile Tax ID
 - Class structure
 - Branding
 - HRIS Field Tracking; setting fields as HR required to avoid errors
- Payroll groups
 - Creating payroll groups and why they are important
- Defining the enrollment experience
 - Enrollment settings
 - Enrollment window
 - Employee/Dependent required fields
 - Creating default eligibility rules
- Importing employees

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
 - Create a dental plan from scratch
 - Create 2 medical plans using the *Rate Library*
 - One with plan based contributions
 - Create an HSA plan from scratch
 - Add documents to display in enrollment for plans
 - Adding documents to show in enrollment and in the home page compliance
- Testing what you've created
 - Adding a demo employee

Add more plans (with current enrollments)

- Additional plan type review
 - Add a Voluntary Life plan
 - Add a group LTD plan
- Enrollment tools
 - Bulk enrollment tools
 - Importing enrollment data



Renewing current plans

- Renewing plans

Setting up open enrollment

- Creating the Open Enrollment
 - Adding the session
- Adding the plans into an OE
- Passive enroll logic check
 - Enrollment types: Prior, Current, Open
- Sending a welcome
 - Bulk welcome
 - Open Enrollment notifications

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 for ancillary
 - Same medical plans for your region
 - Standardization of plan summary
- Carrier API

Day 2

HR & Employee Experience

- New hire
 - Add new employee and send registration information
- Employee registration & login
 - Sending bulk registration email
 - New hires and/or existing employees
- See the employee experience
 - Employee enrollment & ongoing use
- Giving HR Permissions & Access controls
- Managing employees and enrollment
 - Updating demographics
 - Schedule demographic changes



Employee Navigator System Training

- Future dated salary changes impact on OE
- Processing EOI decisions
- Terminations: What's triggered when you set a term date
 - COBRA: Get connected with an integrated TPA

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

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