Employee Navigator System Training Q&A, Summer 2025

Table of Contents

Webinar Housekeeping & Access

GoToWebinar Questions

1. **Where is the dial in number for phone?**
   GoToWebinar does not allow for a dial in number on a webcast, sorry

2. **Is this session recorded, and will it be emailed to attendees?**
   The session is recorded and will be available in the 2025 Employee Navigator Training for Ease Brokers article, typically by the next business day, as well as emailed in the webinar follow up email

3. **At the end of this webinar where do I find the questions and answers from the session?**
   Questions from the training sessions will be posted in the 2025 Employee Navigator Training for Ease Brokers article in the Knowledge Base

Agenda Inquiries

1. **How do I get access to Employee Navigator if I don't have a login yet?**
   You'll need to be added to the system! To get added, you can click here to complete the sign up! Only one person from your agency needs to sign up.

2. **Can we follow along, and set up a company at the same time in EN?**
   Yes, please do!

3. **In this training week will we go over the migration tool from Ease to EN?**
   No. The training this week is focused on configuring a basic company, plans, and enrolling employees. If you need additional information on the migration tool, please review the recording here: Overview of the Ease Migration Tool

4. **If I work with a GA to do a lot of the stuff like building group and renewals, how applicable are these webinars this week?**
   Very applicable still to provide you the tools to be successful in getting the right information to your GA and allow you to feel confident in your system skills if you ever need to build.

Ease to EN Migration

Top Support resources:

- Overview of the Ease Migration Tool

Migration Process

1. **How do we migrate a group from Ease to Employee Navigator (EN)?**
   The Migration Tool is available, and you can find more information in the Migration Tool Overview webinar recording

2. **Will existing groups in Ease transfer automatically to EN, or must we migrate them manually?**
   Existing groups will need to be migrated based on your selection and timeline. Employee Navigator is not automatically moving groups

3. **Can we test a migration by keeping a group active in both Ease and EN?**
   No. There is no way to migrate a group via the Migration Dashboard while keeping the group in an Active status in Ease, as the status is automatically updated to Migrated. Groups will be put into a Read Only mode upon migration. You could begin by migrating a group that is not currently active or has fewer complexities as a test run and use this experience to refine your process before migrating larger or more complex groups

4. **What happens to payroll/carrier integrations when migrating from Ease to EN?**
   No. Due to complexity, connections will be automatically disabled upon migrating via the migration tool on your behalf and would need to be reinitiated once the group has successfully migrated to the EN platform.

5. **Do plan details like age-banded rates, structure, and benefits carry over?**
   Yes. Plan details will come in with the migration. You can view more in the Overview of the Ease Migration Tool

6. **Is there a migration tool or automation available?**
   Yes, you can learn about the tool in the Migration Tool Overview webinar recording

7. **Are templates or best practices provided for clients during the migration?**
   The migration tool in Ease will allow you to see if a group is ready for migration. You can learn more in the Migration Tool Overview webinar recording

8. **Who can we contact if errors arise while migrating groups?**
   Your team will have Ease Support to reach out to during the migration process if there are any errors.

9. **Will there be a webinar that walks through the migration process?**
   There is a recording in the Migration Tool Overview webinar article

Access & Transition Timeline

1. **Can we use Ease and EN simultaneously during transition?**
   Yes, you absolutely can

2. **Can brokers maintain groups on both Ease and EN at the same time?**
   You can have groups on different systems; however, keep in mind that if you transition a group using the migration tool, you will not be able to access that any longer in Ease to edit. It will remain in an view only mode

3. **Is there a timeline/deadline to complete migrations (e.g., by 12/31/2026)?**
   There is not currently a timeline or deadline. Employee Navigator will give plenty of notice when the time arises so that you don't feel any sort of rush.

4. **When is the official sunset date for Ease, if any?**
   There is no sunset date scheduled, currently. Employee Navigator will give plenty of notice when the time arises so that you don't feel any sort of rush.

5. **Can we still add new groups to Ease during the transition?**
   Yes, new groups can still be added to Ease

6. **Will our Ease logins work for EN?**
   No, in order to gain credentials to access Employee Navigator, please click here to start the process: **SIGNING UP HERE**

7. **Can I access EN now, and how do I get started?**
   Yes, you can gain access to Employee Navigator by clicking here to sign up for the free Employee Navigator license: **SIGNING UP HERE**

Pricing & Fees

1. **Will we be charged for both Ease and EN during transition?**
   No, all licensees pay for only one platform even if you have access to both Ease and Employee Navigator platforms. If you have an Ease license, you are eligible for a free Employee Navigator license.

2. **What are the EN pricing tiers and structures (per user/seat, min 5 users)?**
   Employee Navigator currently has four tiers: Enhanced, Enhanced Plus, Elite and Platinum. The free license that is currently assigned to Ease licensees is an Enhanced Plus license. Current pricing for paid Employee Navigator licenses can be found here: Employee Navigator Pricing. Ease's "per user" license model will be adopted by Employee Navigator beginning in the fall of 2025. Currently Ease's "per user" fees are about $125 per user per month, and Employee Navigator's fees will be in this range keeping with our earlier communication that there will be no major pricing change for Ease licensees. While most ease licensees are paying "per user", there are a few licensees who had "handshake" agreements with much lower fees which will be adjusted. Our stated goal to offer low-cost licenses for brokers remains.

3. **Is there a reduced rate for small agencies or single brokers?**
   Employee Navigator's license will still have a low-cost license that will be offered, and the price will be in line with Ease's pricing.

4. **If we only use certain EN features (like PTO or onboarding), can pricing reflect that?**
   Employee Navigator's Elite licensing tier includes a basic PTO and onboarding for all companies on the broker's license.

5. **Who do we contact to discuss pricing concerns?**
   If you have questions specific to your agency or renewal, please reach out to Success at success@employeenavigator.com

Platform Functionality & Features

1. **Are all Ease features (e.g., onboarding, offer letters, reports) available in EN?**
   There may be some onboarding features, like offer letters that are not available yet; however, they will be available starting this Fall

2. **Will EN support ancillary carrier forms in the future?**
   No

3. **How does EN handle complex plan structures like class-based benefits?**
   Employee Navigator is easily ready to handle complex structures and allow for class-based benefits in one plan build
4. **Will the GA portal/library be available for plan setup?**
   The Ideon rate library is available for small group ACA rated medical plans (both composite or age banded)

5. **What is the user experience like for report generation in EN?**
   Reporting in Employee Navigator is easy and customizable at the group level. There are also reports available to pull at the agency level for cross company reporting

Training & Support

1. **Will there be future hands-on or live training sessions?**
   Yes, there are training sessions for July and August available, too

2. **Are there specific webinars dedicated to migration?**
   Yes, there is the Migration Tool Overview

3. **How much time should brokers or HR allocate to becoming proficient in EN?**
   The system is similar to Ease in many ways, with different locations of input. Give yourself time, but remember, you have us at Employee Navigator to help you get comfortable and confident – we know you can do it!

4. **Is there ongoing support or help available post-migration?**
   Yes, your agency's Premier Users will be able to reach out to Employee Navigator's Support Team

Client Communications

1. **Are there flyers or communication templates to help clients understand the transition?**
   There are not currently any flyers or communications that are meant to be given to your clients

2. **Can we notify clients about the shift to EN in advance (e.g., 30 days out)?**
   Yes, the more time you provide them, the better!

3. **Is there a sample client communication resource available?**
   Employee Navigator has not created a sample client communication, as each agency may choose to provide different messaging

Licensing & Contracting

1. **Do we need a new EN license if we already have one with Ease?**
   You will need to sign up for the free Employee Navigator license, by clicking here: **SIGNING UP HERE**

2. **Will our free EN brokerage license expire if Ease doesn't sunset?**
   No, we will not terminate your free Employee Navigator license as you'll be able to continue to use both systems during the transition

3. **Can existing Ease users access EN resources (like training videos) without activating full licenses?**
   No, but you can gain access to a free Employee Navigator license by clicking here: **SIGNING UP HERE**

Configuring a Company

Company setup basics

1. **Is the unique identifier required for employees to use when registering for the first time?**
   If they were not sent a registration email they will need to provide that when logging in.

2. **Can you clone a group and its plans exactly and make any changes needed to the new group?**
   Yes, you can copy an existing group, and then in the benefits tab copy plans as well; however, Employee Navigator would recommend using the Company Library for your agency to create your own templates so you don't need to worry about whether or not you've changed all customized details for a group!

3. **How do you delete a job class**
   Deleting a job class is not possible; however, if there are no employees listed in the class, you can deactivate it. It will no longer surface for use.

4. **When I'm on my EN broker home page, I do not have the option to "Add company".**
   Be sure that you are at the Brokerage level of the system, not Licensee! You'll need to manage your brokerage from your licensee login page to find the button.
5. **Can dynamic classes be used for eligibility?**
   Absolutely! This allows you to work with more intricacies.

6. **Can class structures (i.e. class, department, division, etc) be setup via an import?**
   No, you will manually create the structures and then import employees into them with your census upload.

7. **Can we also limit access by business unit and class?**
   Yes, you can give HR users access to just 1 business unit or just 1 class. Here is more information: HR User Access Control List

8. **Can I set up a different default payroll group for each class of employee?**
   If you have employees that have different pay frequencies then you can add multiple payroll groups. If everyone has the same frequency then they can be grouped into one payroll group.

9. **Where would you recommend putting CA vs OOS if HMO is only available for CA EE's?**
   You can set up Dynamic Classes based on State.

10. **Can you build a library of links for all the carriers so you don't have to add them each time?**
    Yes, we do offer the ability to create a library of your commonly used plans so that if you add the information once you would be able to copy it down from the library so you don't have to retype those details every time. There are great articles on our Help Center that will address how to build your agency library

11. **Do you have the ability to add the client logo and customize their registration page and home page?**

You can add a client logo that will appear in the upper left hand corner, but you cannot customize their own registration page.

12. **If we made a mess of a new build in training, can we delete it and start all over?**
    You can deactivate a company in Employee Navigator or edit it; however, you cannot completely delete a company from Employee Navigator.

Payroll Group & Calendar

1. **How are holidays handled on the payroll calendar?**
   The payroll calendar does not take holidays into account. If you need to change the date that someone will get paid, you can remove the green button around the date by clicking on it and that will remove it from the system. Then, you would need to select the proper date for the check to cash.

2. **If you've already set this up, is there a way to double check if you put the correct first payroll of the year?**
   You can check the pay dates by going into the payroll group and calendar

3. **So we will always want to request the first pay date of the calendar year even if they are on plan year schedule for benefits when electing payroll calendar?**
   Yes

4. **We have a group that has 26 pay periods but only deducts premium contributions is 24 pays. How would that work?**
   Within the Payroll Group you can skip deduction dates to accommodate this.

5. **Does a group have to be set up on a payroll group?**
   Yes, in order for the employee to see a per pay cost in the system.

6. **Very uncommon but I have had a company that paid 24 times a year but it was every other Friday. For the two months that had 3 pays, they were only paid the first 2. Is it as simple as removing the two dates that are 3 pay months?**
   Yes you can skip dates in EN.

7. **If there is no default payroll group assigned explicitly, what is the default?**
   Employees will only see a monthly cost.

Establishing Plan Rules

Eligibility Rules

1. **Does the system recognize carrier specific rules? Like in CA Anthems benefits kick in 1st of the month following 1 month but Kaiser is 1st of the month following 30 days.**
   No, Employee Navigator does not recognize those inherently. You'll build the eligibility rules in the plans.

2. **Would Offices be used to distinguish between In state and OOS employees?**
   Offices are to set up different locations and assign the address to that location.

3. **For a new hire - what if the employer has a 90 day waiting period, benefits start on the 91st day?**
   To set that up, you'd set the waiting period to 90 days and the entry rule to "hire date" and that will accomplish what you're looking for.
4. **If there are different eligibility rules based on benefit, is there an option to bundle multiple benefits together or will each eligibility rules for each benefit need to be created separately?**
   If benefit categories don't have the same eligibility rules, you would not be able to bundle them together. You would need to create them separately.

5. **Can we change eligibility rules once they're in place?**
   Yes. You can make changes to eligibility rules. You would want to be sure to understand the impact of making these changes. If you are uncertain, your Premier User(s) can reach out to Support to talk through it.

6. **When setting up eligibility rules, why does the system make you make a choice of who is eligible, instead of defaulting to "Everyone" and "full time" as the default?**
   Employee Navigator does not want to assume eligibility for you.

7. **Where would you recommend putting CA vs OOS if HMO is only available for CA EE's.**

You can set up Dynamic Classes based on State, and then base the plan eligibility on Dynamic Classes.

8. **Can you explain the coinciding with language**
   If a group's waiting period is first of the month following 30 days and their 30th day fell on the first of a month and they are eligible that day you would use coinciding with. If they need to wait until the first of next month you would use first of month following.

9. **Can you show us how to code no waiting period for PT to FT?**
   That will be by using the Demographic Change Rules and setting them to 0 days and Change Effective Date.

10. **Can you create rules for seasonal folks that would match their measurement period?**
    Employee Navigator would recommend tracking seasonal employees through the ACA module and allowing the system to track their eligibility. If/when the employee tracks as eligible after their measurement period, you can have the system trigger any benefit waiting period to allow the employees to enroll during the admin period.

11. **For rehire eligibility, can you differentiate between someone who was laid off vs someone who had voluntary term then rehire?**
    No, there is no way to provide rehire rules based on the original term reason.

12. **When will multiple eligibility rules be available in Employee Navigator. When I look at my EN-Migration Report it has this message for several: Plans with multiple eligibility values set are not supported at this time. This is being added to Employee Navigator; no action is needed at this time.**
    Multiple eligibility rules are supported in EN. Additional functionality for the migration tool including plan level multiple eligibilities is actively being worked on with a goal by the end of July. New updates are being released weekly, and we would recommend checking for updates via the helpdesk article link available at the top of the dashboard or the AI Assistant.

Default Eligibility Rules

1. **So, the default rules do not always need to be configured. Correct?**

Correct

2. **We have two eligibility rules for different carriers. One is termed at the end of the month, and the other carrier has the termed date as the last day of EE's work. How do we set this?**
   You can utilize default rules but change the term rule per plan if you'd like. Or, you can bypass default rules and setup eligibility per plan.

Setting Up a Basic Plan

Plan Setup

1. **If I click on the item in the checklist of missing items to complete the plan, will it bring me to the location of that item?**
   No, you will need to use the left-hand navigation to get to the missing items.

Ideon Rate Library

1. **Where does the data from the rate library come from?**
   Carrier reports the plan to Ideon and then we pull from Ideon. More info on this tool can be found at: Rate Library Simplifying Small Group ACA and Composite Rated Medical Plans

2. **Will Navigator allow access to the rate/plan libraries we currently have in EASE?**
   Employee Navigator uses the Ideon rate library to copy medical plans from and then you can create your own agency library of plans to copy from.

3. **Can you provide more insight into the IDEON rate library? Is that defaulted to all carriers?**
   Yes, it is available for all carriers and all states

4. **Is IDEON only for Medical plans?**
   Yes, the Ideon rate library is only available for small group medical plans

5. **Does Florida not have any plans on the rate library?**
   It defaults to the state that is listed for the company under the settings tab.

6. **What if I get a message stating no rates found for Travis County, TX?**

Then you will need to build the plan from scratch like Nicole is going over now.

7. **When you pull a plan from the rate library are the SBC's automatically uploaded or do we have to manually upload those? Specifically CalChoice.**
   No. The SBC documents will not be automatically uploaded. You can upload the documents in the Documents tab of the company, or in the Policy Info > Communications tab of the plan.

8. **If we offer multiple medical plan options, can you differentiate using different medical plan names?**
   Yes, you can.

9. **Can you change the end date to something later if you write a 15 month medical contract with a carrier?**
   You can update a plans end date after you create it yes, however, if this could affect Open Enrollment this may require a call to Support just to see the best way to handle this scenario

10. **What if they have a flat company contribution of $700 a month for whatever benefits they select?**
    You would need to set up the Benefit Allowance on the Benefits tab.

Plan Contributions

1. **Can plan based (base plan vs. buy up) contributions be setup?**
   Yes, you can setup plan-based contributions! Please find more, here: Base Plan Contributions

2. **Can employees have a flat dollar contribution, while dependents have a percentage?**
   Yes, you can use the contributions to define differences in types of contribution. You can find more, here: Contributions

3. **Can contributions be based on tenure at the group?**
   Yes, you can build a dynamic class and setup based on years of service from there! It is explained further, here: Contributions

Forms

1. **Are forms available for all plan types?**

No, forms are available for medical, dental, and vision plans in Employee Navigator.

Setting Up Life & Disability Plans

Setting Up Life Plans

1. **We do have some policies that require SOH for any additional amount even if salary increases. Can we do this?**
   On Voluntary, yes you can!

2. **Can you save rate tables so you don't have to add the grids each time on new plans?**
   Sort of….you can create the plan as a library plan so that you can pull it down in your next build and make any tweaks needed to the rates without having to start from scratch

3. **Where do we set the rules for age and salary change impacts on plans?**
   We have that option in EN, it is in the Rate Settings under the Costs section. This will be where you can set when rates change based on age changes and when benefits reduce for age reductions, on life.

4. **What if the proposal for life is not given to us by the 1000? For example, the carrier gives us a whole life plan in increments of $25K, $50K, $75K with non tobacco and tobacco?**
   The short answer: you have to kick in that old school math. So if they said 25k is $50 then divide the $50 by 25 to find the per 1k unit cost. You also have the option in EN to separate and enter in tobacco and non-tobacco rates

5. **Will we be reviewing how to add riders to life? For example, child term riders.**
   Employee Navigator would HIGHLY recommend either using the AI Assistant to ask more about Riders or check out the great information we have on the Help Center about regarding how Riders work in Employee Navigator.

6. **I have been using the Voluntary STDI and Voluntary Life benefits. The carrier requires SOH and SOI forms (EOI). Is there a way to include these to be fillable forms and include them in the Data Exchange?**

We would LOVE for you to push those carriers to work with us to get their EOI integrated! We do have many carriers that provide this option and if we can add more that would be even better. Until then though, there is not currently a way to add a fillable form. That is also something I know our Product team is aware needs to be considered for future enhancement

Setting Up Disability Plans

1. **We do have a group that pays for the first $150 of STD benefit and then the 50% of the benefit after that. is this possible?**
   I don't think we will be able to support that unless you are building that $150 benefit as its own plan and then allow them to select an additional amount as a VSTD
2. **Can you save rate tables so you don't have to add the grids each time on new plans?**
   Sort of....you can create the plan as a library plan so that you can pull it down in your next build and make any tweaks needed to the rates without having to start from scratch

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   We would LOVE for you to push those carriers to work with us to get their EOI integrated! We do have many carriers that provide this option and if we can add more that would be even better. Until then though, there is not currently a way to add a fillable form. That is also something I know our Product team is aware needs to be considered for future enhancement

Setting Up Cafeteria and HSA Plans

Setup & Contribution Rules

1. **Do HSAs have to be setup on a calendar year, or can they start mid-year?**

HSAs can be set up mid-year; however, maximum contributions are still calculated on a calendar year basis.

2. **Will a new mid-year HSA plan know how much an employee already contributed earlier in the year?**
   Yes, the system can see in the calendar year and help with calculations. This and many other questions can be answered in this article from our Knowledge Base: [HSA Troubleshooting: Expectations, Cautions, Calculations & Help]

3. **Does the system default HSA and FSA amounts to the IRS maximum if no value is entered?**
   For HSA, the IRS maximum is automatically built in; however, the FSA plans will need to be manually entered since the employer can set a different maximum (as long as it's lower) than the IRS.

4. **Can employees elect an amount lower than the displayed IRS maximum for FSA?**
   Yes, employees can always elect less than the maximum amount.

Plan Eligibility & Configuration

1. **Can Limited Purpose FSA be made available to someone who waives HSA coverage but has other qualifying HDHP coverage (e.g. through a spouse)?**
   This currently needs to be managed outside of Employee Navigator if they have the above setup, since it's not currently supported.

2. **Can you have two contingent plans in an HSA?**
   Yes, multiple contingent plans are supported

3. **Can you ask employees a knockout question about having other coverage that would make them ineligible for HSA contributions?**
   Yes, you can configure knockout questions; however, this would exclude the employee from the plan entirely, not just from employer contributions. Support may be able to recommend alternative configurations if partial ineligibility applies.

Carrier Integrations & System Limitations

1. **Will Employee Navigator's EDI feeds allow employer HSA contributions to transmit properly?**
   Yes. When connected with an HSA/FSA vendor, EN can send employer contributions via the integration.

2. **Are FSA rollovers supported?**
   Currently, FSA rollover is not supported. The Product team is aware of the limitation, but no changes are actively planned at this time.

Plan Communication Tools

Plan Communication Tools

1. **Can I upload an OE video for all employees to view?**
   Yes, you can upload videos. Here is some more information: Adding Videos

2. **Can you add all documents, and then change/remove/add new documents later?**
   Yes, once you add a document to a plan you can delete the document, or if you accidentally add it to the wrong plan, you can simply change the document to a different plan. This would all be done via the Documents tab > then the specific document needing changed

3. **For the document views - does it keep a log of date and time of when employees viewed it?**
   Yes, the system will keep a log of who the document was opened by, and when.

4. **Is there a place, like there is in Ease, where there are mandatory documents that an employee must view before enrolling in benefits for purposes of ACA reporting? If so, can you please review where we would find this?**
   Yes. There is a box called "Required when enrolling" when you attach a document that will trigger a task for the employee when enrolling

5. **Can you add documents like ERISA Wrap SPD, Prem Conv Plan SPD for employees to review and then sign that they received for audit purposes?**
   You aren't able to do this with your current license level. Please reach out to success@employeenavigator.com for more information on this.

6. **What are considered HR Documents?**
   Anything document that HR is looking to share with their employees that isn't tied to a plan enrollment. So think of things like maybe handbooks or company policies.

7. **Where can you add required notices?**
   Those can be added under the Documents tab and you can mark them as compliance which will ensure they display on the home page for the employee under compliance documents.

8. **Can we embed plan videos as a part of the communications?**
   Yes, absolutely! Videos can be added as plan links, under Benefits > Plan Communications, or under Benefits > Benefit Videos. You can find more information on the options here: Adding Videos

Testing the Build

1. **Will the demo employee be visible to the company administrator?**
   Yes, they can view all demo EEs by going to Employees Tab > Add Demo EE > View Demo Employees.

2. **Can we use the group we are building as a test group?**
   Yes, absolutely!

3. **Do I need to add a demo employee to each company?**
   Yes, demo employees are company-specific and must be created individually for each group.

4. **Do I have to register the demo user?**
   No, it's optional. You can also view the system as an employee using your admin login.

5. **Can employees only see per pay cost (e.g., bi-weekly) and not monthly cost?**
   Yes, the enrollment flow only shows per pay cost unless they click 'Details' in a plan.

6. **Can EN connect benefits to payroll?**
   Yes, through payroll integrations.

7. **Can I test a build using a demo employee before going live?**
   Yes, demo employees can be used to walk through and validate plan setup.

8. **Can a demo employee be added to a real group?**
   Yes, and you can add multiple demo employees per company.

9. **Do demo employees appear on reports?**
   No, they are excluded by default.

10. **Can we use demo employees for training during OE and record the experience?**
    Yes, you can simulate the full experience using a demo employee and create recordings.

11. **Do you recommend always creating a demo employee for each company?**
    Yes, it is best practice to validate build and costs.

12. **Can a demo employee be deleted?**
    Yes you can delete the demo employee by going Employees > Delete Employee

13. **Is there a way to view the plans built out as the employee?**
    Yes, you can use a demo employee to view the plans, including eligibility and costs.

Adding Employees & Dependents to Employee Navigator

Top support resource(s) to review for this topic:

- Importing

Employee & Dependent SSN Requirements

1. **Is SSN required for employees? Can HR add an employee without it?**
   Employee SSNs are required for enrollment. HR can add an employee without a SSN, but the employee must enter it when registering.

2. **Can dependents be added without SSNs?**
   Yes, but it's recommended to require them if carriers need the info. You can make Dependent SSNs required under Benefits > Dependent Profile Fields.

3. **Can dummy SSNs be used for dependents if we don't have the real ones?**
   While technically possible (any 9-digit number), EN does not recommend it. For demo employees only, EN auto-generates fake SSNs ending in 0001, 0002, etc.

Importing Employees & Enrollments

1. **What's the minimum information required to add an employee?**
   First name, last name, date of hire, date of birth, and class.

2. **Can we import all employee and enrollment data on one spreadsheet?**
   No. You'll need separate imports: one for demographics, and one per benefit type (e.g. medical, life, disability). Plans with the same benefit type can share an import.

3. **Do we need one import per plan option (e.g. three medical options)?**
   No. The "Plan Name" column on the import will allow you to designate the appropriate plan and have multiple plan options of the same benefit type on a spreadsheet.

4. **Can customized templates with different headers be used?**
   Yes, if you map your headers to Employee Navigator fields during the import. Employee Navigator templates are recommended for fewer errors.

5. **Can you pull a census of current employees to help build enrollment imports?**
   Yes, you can use reports to build the first stages of the enrollment import!

6. **Can waivers be imported?**
   No. Employee Navigator does not currently support importing waived coverage.

Importing Compensation

1. **Can you import mass salary updates?**
   Yes, bulk salary updates can be done via an import.

2. **When importing salary, do you need to include "hours per week"?**
   "Hours per week" is only required for hourly employees, or when marked as an HRIS required field.

Other Import Questions

1. **If you exclude an employee from a future import, will they be deleted?**
   No. Employees are not removed from the system unless manually deleted.

2. **If we don't have an employee's SSN, can we provide a dummy one for login or setup?**
   Employee Navigator never recommends using dummy data for an employee.

Manual Enrollment Management

Top support articles to review for this topic:

- The Wall – Company Level
- The Wall – Licensee Level
- The Wall – Licensee Wall Dashboard
- The Wall – Enrollment Changes Wall Feed Setup

1. **I am struggling with understanding the wall and triggers. As a new Employee Navigator user I am nervous that I am not setting up the wall in a way that will notify appropriately. Are there videos on this subject?**
   Yes! You can view video content in Employee Navigator's video library, Employee Navigator University, and read about it in the Knowledge Base.

2. **When setting up the wall is there a difference between setting up a wall for a company or for the brokerage?**
   Enrollment change notifications will be setup at the group level and can be set to be visible to both the brokerage and company. Find more here: Enrollment Changes Wall Feed

3. **Will we continue to receive daily emails of changes/enrollments made by employees?**
   You will need to setup a notification via the Wall. You can learn more here: Enrollment Changes Wall Feed

4. **So the WALL is like the to do list in EASE**
   Yes!

5. **Will the Wall be available/visible within a GA portal if brokers enable access to a particular group?**
   Employee Navigator's Support Partner Wall was designed to provide a centralized workspace, for Support Partner's with the Company Support role, to efficiently manage change event reporting across all assigned partner agency companies.

6. **Will the Wall to-do Tasks be changed to be similar to the Ease To-Do actions?**
   They have recently been! The Enrollment Changes feed allows for multiple groups and notifications once per day for things that need processing.

7. **Will the covered members feed automatically replace the old wall?**
   The Enrollment Changes Wall feature was designed to make it easier and faster to manage enrollment change event reporting across the various Wall pages. If a company was previously included in a Covered Members Wall feed, Enrollment Change Wall tracking has already been enabled. No action is needed to activate it, but we recommend reviewing company Wall settings to ensure they meet your current needs.

8. **Do incomplete Wall events need to be manually marked complete?**
   Yes, they remain on the Wall until marked completed.

Automated Enrollment Processing

Top support articles to review for this topic:

- Data Exchange Integrations
- 834 Self Service EDI

1. **How does EN handle effective dates for newborns added after the plan year ends, especially with EDI feeds?**
   If prior year plans are ended, late additions like newborns will receive the new plan year effective date (e.g., 5/1). Manual intervention is required in such cases.

2. **Is there a cost for EDI or data exchange integrations?**
   Data Exchange integrations are free. EDI feeds (834) have a fee, generally $0.45 PEPM. Review your license agreement for specific costs.

3. **Can small groups integrate with carriers using EN?9**
   Yes, data exchange has no member limit. EDI file minimum requirements are set by the carrier. Reach out to your carrier to find the minimum.

4. **Are Ease integrations still active?**
   Yes, Ease platform still supports adding and renewing carrier integrations.

5. **How do carrier changes impact Employee Navigator connections?**
   At renewal, rebuild plans and switch integrations after OE ends. Disable the old connection after plan year ends.

6. **Who initiates carrier integrations in EN?**
   Agency users under the license initiate and complete carrier integration setup.

7. **How are Life/AD&D plans treated in EDI connections?**
   Ask carriers whether to split or combine Life and AD&D in builds, as preferences vary.

8. **Where can I find a list of EN-integrated carriers?**
   To find a complete list of Data Exchange integrations, visit Employee Navigator Integrations. For other connectivity, use the Employee Navigator Marketplace to find out if you partner is integrated!

9. **Does EN integrate with Benefits Guide (Salesforce)?**
   Not currently, but An API for Agency Management systems will be released this summer for integration work.

10. **When are data sent to carriers via feed (EDI/API)?**
    Check the specific carrier's Help Center article for their data feed schedule.

11. **Why don't we see changes when using an EDI feed?**
    Changes are auto-sent to carriers. Wall events primarily track non-integrated plan activity.

12. **How do I audit benefit enrollments on EDI-connected plans?**
    Use the reports section under plan setup or ad hoc reporting for active member lists.

13. **Is there a summary of Employee Navigator integration pricing?**
    Integration pricing (EDI) details are in your license agreement. Data Exchange integrations are at no cost.

14. **What does the ** next to a carrier name (e.g., BCBS TX) indicate?**
    **Configurations marked with a double asterisk are generally Carriers who have requirements for additional options that may not be supported by Employee Navigator's EDI engine. Again, please pay special attention to the specific configuration notes in our EDI forum as they will outline what is/is not supported.

15. **Will salary-based benefits update automatically via EDI?**
    Yes, Employee Navigator sends new salary and benefit data to the carrier if integrated.

Renewing Plans & Hosting Open Enrollment

Top support articles to review for this topic:

- Open Enrollment: Start Here
- Everything Open Enrollment

1. **Can you schedule an open enrollment reminder for day 2 and day 5 for incomplete employees?**
   No, if you choose 5 it sends on day 5, 4, 3, 2, and 1 or until an employee completes their enrollment workflow. You cannot say only send on day 5 and 2.

2. **Is passive enrollment in EN automatic?**
   No. You must set the ending plan actions in the open enrollment setup.

3. **If Medical OE is 7/1 and Ancillary is 8/1, does that mean the employee would need to login twice?**
   In that scenario you would need to set up 2 Open Enrollments in the system. This would require the employee to log in twice to enroll in the benefits in each OE window. If you create a 07/01 OE, the 08/01 benefits would not pull in that OE window. If you created an 08/01 OE, all benefits would pull in this OE, however, we would not recommend including the benefits that started on 07/01. The

reason for this is if the employee enrolled in a 07/01 plan in a 08/01 OE window, their start date will be 08/01, not 07/01.

4. **Once Open Enrollment is closed, are you able to reopen it for an employee who didn't complete it? Or do you have to reopen for the whole group?**
   You can unlock the open enrollment for a single employee on their Profile under Actions.

5. **If we have 100% Employer paid products that need renewed, can we run a passive open enrollment for 1 day to just renew everyone's elections to the new plan year?**
   Yep, you could also just let the current end and then use the 'bulk enroll' option to re-enroll everyone in the new benefit on the effective date

6. **Will we still be able to pull a OE change report like how we are able to in Ease?**
   Yes there are many reports you can pull about open enrollment changes. Employee Navigator recommends reviewing the Open Enrollment Reporting article in the Knowledge Base, and at Sessions 4 of our most recently recorded Open Enrollment training: Live Training: Spring 2025.

7. **Can we make our own OE email instead of using the templates?**
   Yes! You can update the email templates within the group and save it.

8. **Can HR or admins preview Open Enrollment (OE) emails or send them to themselves?**
   Yes, you can use Preview Email in the setup. Preview Email only sends to the admin viewing. To send to HR, include them as an employee and send them the OE email.

Daily HR Management

1. **Can employees sign or enroll from the HR/Broker side, or must they log in as the employee?**
   Admins can complete enrollments, but only employees can sign their own forms.

2. **How do I manage pending evidence of insurability requests?**
   Go to the company Home tab and approve or deny the pending amount in 'Things to do'.

3. **Does EN have a built-in screenshare option to assist employees?**
   No, but it's a noted enhancement suggestion. Screensharing would need to be done via third-party tools like Zoom or Teams.

4. **Can employees be enrolled in prior plans if they're late?**
   Yes, but enrolling in a prior year plan after OE ends can overwrite current enrollments. If OE is still open, it's fine.

5. **Can salary visibility be limited from HR users to maintain privacy?**
   Yes. Salary can be masked from an HR user.

6. **Can HR access be set to view only or limited?**
   Yes, HR permissions are configurable. See the HR Users and HR Permissions for more information.

7. **What info is required to add an employee? Can SSN be skipped?**
   Required: SSN, Name, DOB, Sex, Hire Date, and Class. SSN can be skipped for import but must be added before enrollments or dependents.

8. **Does the system prompt employees to complete missing profile data?**
   Yes. Required fields prompt red text alerts if skipped.

9. **Is HR training available?**
   Yes, live and recorded trainings are available: HR Training

10. **Can terminations be undone, and is there a time limit?**
    Yes, terminations can be undone anytime. See Rehire or Undo Termination for a Terminated Employee for more information.

11. **Do HR users see payroll calendars?**
    Yes, pay dates are visible to HR users.

12. **Will undoing a termination resend data to integrated carriers?**
    Yes, reactivating coverage will be sent with the next carrier file.

13. **Can pending EOI status be labeled more clearly for payroll?**
    Not at this time, but the request has been shared with Product. Pending deductions are not sent to payroll.

14. **Can the 15-day registration email window be changed for employees?**
    No, it's fixed. Links expire after registration or 15 days. You can resend if needed.

15. **Can HR manage payroll in EN if granted access?**
    Yes, if they're managing an integrated payroll system, access should be granted.

16. **Can HR track employees turning 65?**
    Yes, run a report including birthdates and ages.

17. **Can HR add hourly rates without seeing all compensation?**
    No, compensation access is all-or-nothing. But you can assign them to only specific classes to limit access.

18. **How do HR users toggle between their HR and Employee profiles?**
    Click their name in the upper-right corner to switch between views.

Miscellaneous

1. **Is there a phone app for EN?**
   No, there is not an app; however, Employee Navigator is mobile friendly for phone access

2. **If my tool bar does not have PTO or Tasks. Do those come if there are things to be done?**
   Ease Early Adopters with the free license do not have an option to add PTO or Onboarding/Task. Please feel free to reach out to success@ease.com to see if they have any insight to when an upgrade option might be available.

3. **Is Employee Navigator integrated with AgencyBloc?**
   Yes, you can read more here: AgencyBloc Overview

4. **Are we able to add custom fields?**
   Yes, under Benefits > Settings > Custom Fields

5. **Does Employee Navigator translate to Spanish?**
   Yes, the employee can click on their name on the top right and select Espanol.

6. **How does the system handle overaged Handicap dependents?**
   If the dependent is marked as disabled within the dependent record, Employee Navigator will not drop the dependent.

7. **If we acquire another agency and they currently use EE Navigator, is there a way to transfer their client data over to our agency? Or, do we have to rebuild each client portal?**
   Yes, the current agency will send you a request to transfer the companies and you will accept the request and they will be transferred.

8. **Is there a way to see the email activity like we can in ease in the sense that the email was received and opened?**
   Not YET, but we are working on enhancements to our email tracking! Keep an eye on those Product Updates and News releases to see when this comes out.

9. **Can we create a dummy company for training purposes? Like we can in EASE?**
   Yes, you can mark a group as “Is Demo Company” during setup, or in the Settings tab of the company.

10. **Can you set up agency user permissions like HR permissions? Do we have that level of control over agency users?**
    Yes, you can also set permissions and access to agency users. You can find more information on that by going to Adding and Managing Licensee Users

11. **The AI assistant on Ease is only accessible to the Administrator on Ease (admin of the portal itself). Is this the same with EN? If not, why is it different be the two systems?**
    It is available for brokers and HR on Employee Navigator.