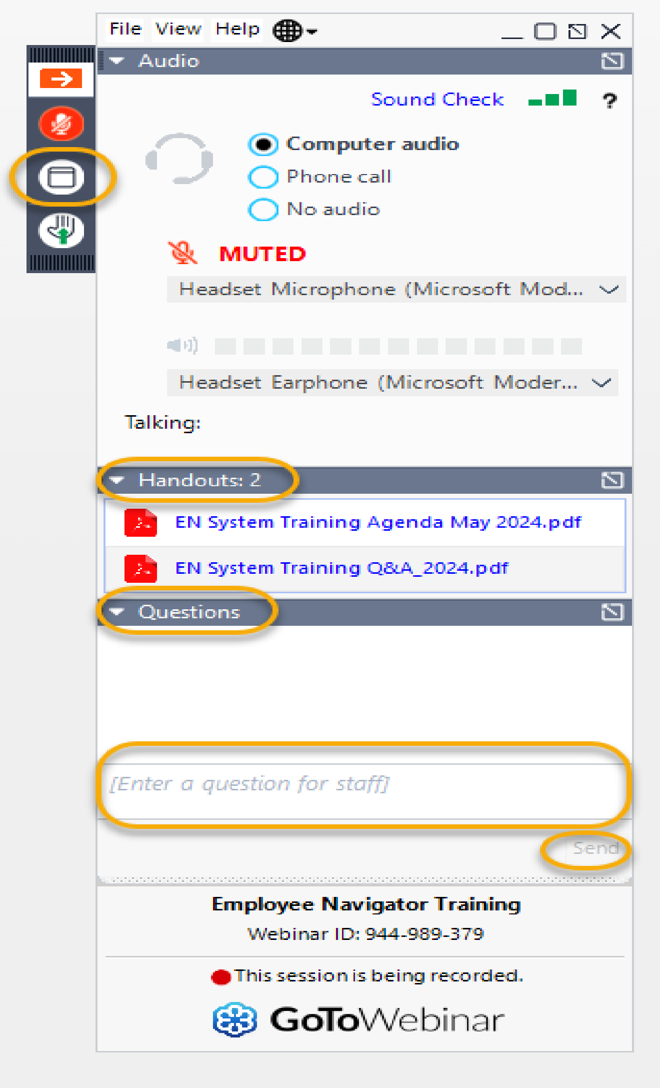
employee NAVIGATOR

Employee Navigator
System Training

Day 3

Tips for using your panel tools to engage

- View in full screen
- The slide presentations and Q&A are available to download in the *Handouts* section
- All participants are in 'listen only' mode
- Use the *Questions* section to submit questions to our team
- Yes, this will be recorded! It will be posted in [2025 Employee Navigator Training for Ease Brokers]



Agenda

- **Recap**
- **Testing the build**
  - Using a demo employee
- **Adding employees & dependents to the system**
  - Census import
  - Importing plan enrollments
  - Enrollment tools
- **Enrollment management**
  - Initiating integrations
  - Manual options

Weekly Recap, So Far

- October System Training has been added to the application
- Completed the company profile, structure, payroll group, benefit setup, and default eligibility groups
  - Benefits added: medical, dental, group life and AD&D, voluntary life and AD&D, group disability, voluntary disability, cafeteria plan, (FSA), and HSA plan
- Added a plan document
- Reviewed plan communications and category overviews

Testing the build

Testing With a Demo Employee

- Purpose of Demo Employees
  - Test company setup, plan eligibility, and user experience before going live
  - Not included in reports or carrier files — no cleanup required
  - Ideal for validating third-party integrations and enrollment flow
  - Recommended to add and enroll a demo employee before launch

- View the Site as an Employee
  - Option 1: Employee Home Page (via Employee Management tab)
    - View only — cannot complete onboarding tasks
  - Option 2: Register as Demo Employee
    - Add your email > send Welcome email (Profile tab > Manage Login)
    - Allows full onboarding experience

- Demo Employee Behavior
  - Will NOT:
    - Appear in most reports (except I-9, W-4, State Withholding)
    - Receive New Hire or Newly Eligible emails
  - Will:
    - Appear in: Review Insurability Report, Pending EOI, wall feeds
    - Receive: Welcome, Password Reset, Broadcast News, OE Notification emails (if email is added)
    - Accrue PTO

Adding employees & dependents to the system

Importing

- Importing Data: Key Guidelines
  - Row 1 = Column Headers (used to map fields in import process)
  - Blank cells may overwrite existing data
    → To avoid this:
    - Remove column or
    - Set to "Skip" during mapping
    - Some fields won’t overwrite existing values if left blank (e.g., Salary, Termination Date, Dependent SSN)
- Best Practices
  - Use Employee Navigator import templates when possible
  - Imports are final — cannot be reversed
  - Be careful: easy to overwrite or corrupt existing data
  - Matching names is critical when no SSN is present (e.g., "Jane Doe" ≠ "Jane R Doe")

Importing

- Updating Demographics
  - Must include: SSN, First Name, Last Name
  - Use Demographic Update import type for eligibility-impacting changes
  - Include correct Effective Date
  - For payroll-integrated groups, do not import terminations
- Dependent Updates
  - Without SSN, name must exactly match existing system record
    - Mismatch creates a duplicate dependent
- Enrollment Imports
  - Hire Date required in system for import to succeed
  - For dependents, names must exactly match existing record
    - Mismatch = new record + enrollment assigned to new record

Enrollment management

The Wall

- New updates were released this Summer to close some parity gaps between Ease To-Do's and Employee Navigator's Wall

- Enrollment Changes Wall: Overview
  - New feature replaces the Covered Members Wall feed
  - Designed to make enrollment change tracking easier and more visible
  - Automatically enabled for companies previously in Covered Members

- Managing Enrollment Changes: Key Differences
  - Settings are now managed directly within the Company
  - No need to configure Wall feeds from the Licensee Wall

The Wall

- Tracking Enrollment Changes
  - Triggers events for manually processed plans only
  - Event groups include: Add Coverage, End Coverage, Cost/Benefit Changes, Name, SSN, DOB, Address
- Allow HR Users to View Events
  - Licensee users see events automatically
  - Set to Yes if Company HR should see and process events
  - Set to No to restrict HR access
- Enrollment Changes Managed By
  - Assign processing responsibility: HR Admin, Broker, or Support Partner (future feature)
  - Selection adds a badge to each event
  - Completed events hide this badge, but show hover-over user detail

Integrations

- Data Exchange:
  - Most major ancillary carriers and growing medical carriers
  - Check the Employee Navigator Integrations article to see if you carrier/TPA is available on the Data Exchange, and review the instructions associated
- 834 EDI
  - When Data Exchange is not available, you can use EDI feeds. There are hundreds of pre-configured carriers listed on the Marketplace
- Payroll API
  - Use the Payroll: Who we integrate with, their PEPM fees, and how to contact Partners article to review available partners

Coming Up Next:

- Monday:
  - Configuring a company
  - Establishing plan rules
  - Setting up basic plans
- Tuesday:
  - Setting up life and disability plans
  - Setting up cafeteria and HSA plans
  - Plan communication tools
- Wednesday:
  - Testing the build
  - Adding employees and dependents to Employee Navigator
  - Enrollment management:
    - Manually
    - Integrations
- Thursday:
  - Renewing and hosting open enrollment
  - Daily HR management
  - Employee Navigator’s support resources

Q & A