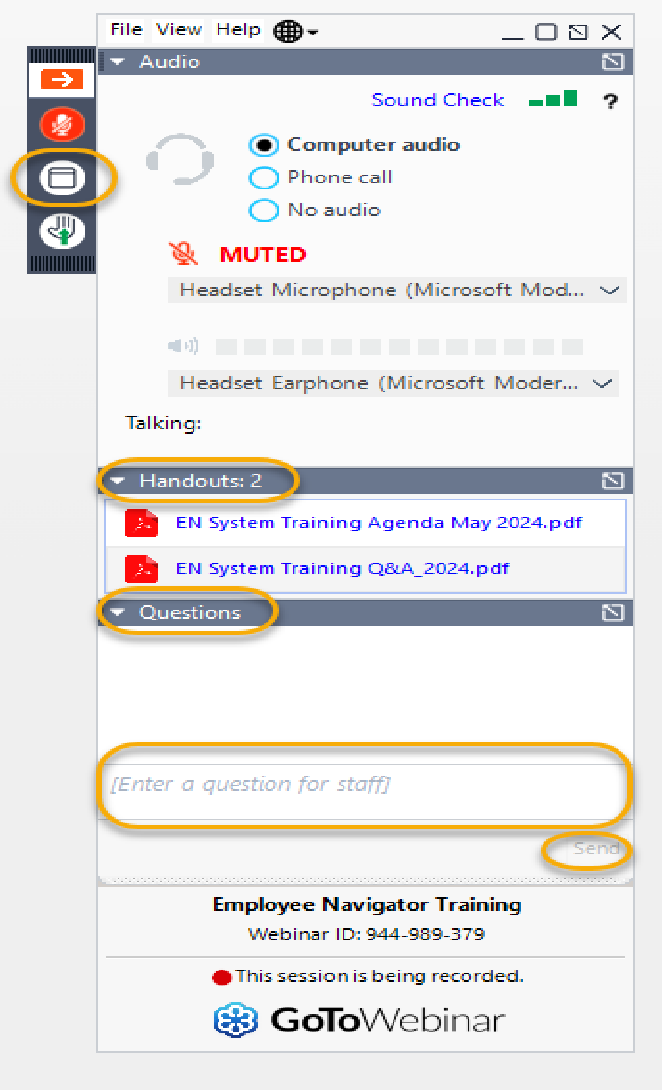
Employee Navigator System Training

Day 4

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
- Preparing plans & hosting open enrollment
- Daily HR Management
- Employee Navigator's support resources

Weekly Recap, So Far

- Company configuration:
  - October System Training has been added to the application
- Benefit configuration:
  - Completed the company profile, structure, payroll group, and benefit setup
  - Added plan documents
  - Reviewed plan communications and category overviews
- Tested the system using a demo employee
- Adding employees & enrollments
  - Imported employees and their dependents
  - Imported enrollment to medical plans
  - Bulk enrolled employees into life and disability
- Enrollment management:
  - Set up enrollment change tracking
  - Discussed integration setup

Preparing plans & hosting open enrollment

Prepare plans - renew, copy, or build from scratch?

Renew

No carrier change

No major plan changes

Provides more accurate reporting for true renewing plan

Copy

No carrier change

Plan has major changes

Adding plan options

Efficient, saves time

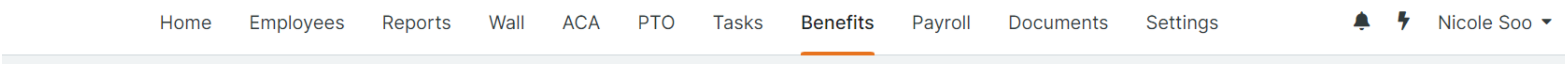
Build from Scratch

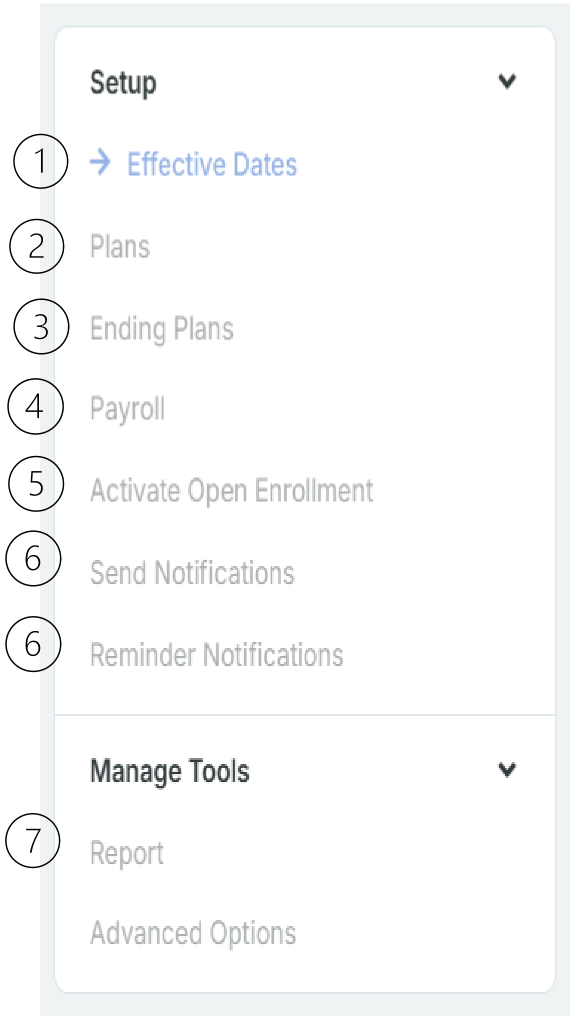
Carrier change

All-new benefit offering

Ensures accuracy of design

Open enrollment setup - review





1. Effective Dates:
   - Controls the effective date of enrollments, the enrollment window period, and the Admin End date. Also includes OE Unlock options.

2. Plans:
   - This section of setup is used to control which plans will be included in the OE.

3. Ending Plans:
   - This area defines how the system will handle enrollments in plans ending 1-day prior to the OE effective date. If there are no ending plans, no action is required.

4. Payroll:
   - The Payroll page is required for companies who are actively integrated with one of our Payroll Partners.

5. Activate Open Enrollment:
   - This is where a session is activated or deactivated. It allows for a review of the settings for the OE.
   - Once all setup steps are complete, the session can be activated. Activating the session allows an HR/Admin user to begin accessing OE for testing.

6. Notifications:
   - Provides access to schedule or generate OE notifications and reminders.

7. Report:
   - Provides access to change reporting.

Options for Ending Plans

1

Passive Enroll: Sets the rule to create a continuation of enrollment in the plan with no action necessary from the employee

Requires the mapping of a *default* plan in which the employee's coverage will roll for the new plan year when no other enrollment decision is made

Passive enrollment will not create enrollment if the member is not eligible for the plan

2

Passive Decline: Sets the rule to create a *Decline* enrollment record in the benefits category when no enrollment decision is made by the employee enrolled in the ending plan

The enrollment in the ending plan will be ended and moved to a prior status

This is the recommended setting when hosting an Active OE

3

End All Elections: Sets the rule to end enrollment in the ending plan when no action is taken

Enrollment in the *current ending plan* will be ended

Passive Enrollment Logic

Question 1:
Is there an active enrollment in the current plan?

If **Yes** = go to question 2

Question 2:
Is there an active enrollment decision recorded in open enrollment for the benefit?

If **No**

Skip to next employee

If **No**

Apply ending plans rule

If **Yes**

Skip to next employee

Daily HR Management

HR Management

- Providing HR access
  - Company > Settings > HR User Access
  - Define permissions for HR
  - Use access control, if applicable

- Managing employees and enrollment
  - Updating demographics
    - Schedule demographic changes, future dated salary changes impact on OE
  - Processing EOI decisions
  - Terminations and termination updates/changes

Employee Navigator's support resources

Tools for training and troubleshooting

System Help Tool

- A Help button can be found on every page within Employee Navigator
- Open the Knowledge Base
- Open the video library
- Access the AI Assistant

Knowledge Base / Help Center

- Our user's manual which contains detailed articles on all system features
- Registration is required for this resource
- Includes access to our Training Workbook, a very popular training tool
- Includes recordings of webinars and trainings

Accessing support

- Need more assistance? Support is here to help!
- Open M-F 9:00 a.m. - 7:00 p.m. ET
- Available via phone and email
  - Find the contact information in your Support tab of your agency
- Information to have handy:
  - Group name
  - A description of the issue at hand
    - Call out any specific plans that are experiencing the issue
  - Examples of any employee(s) impacted

Q & A

Thank you for attending System Training!