



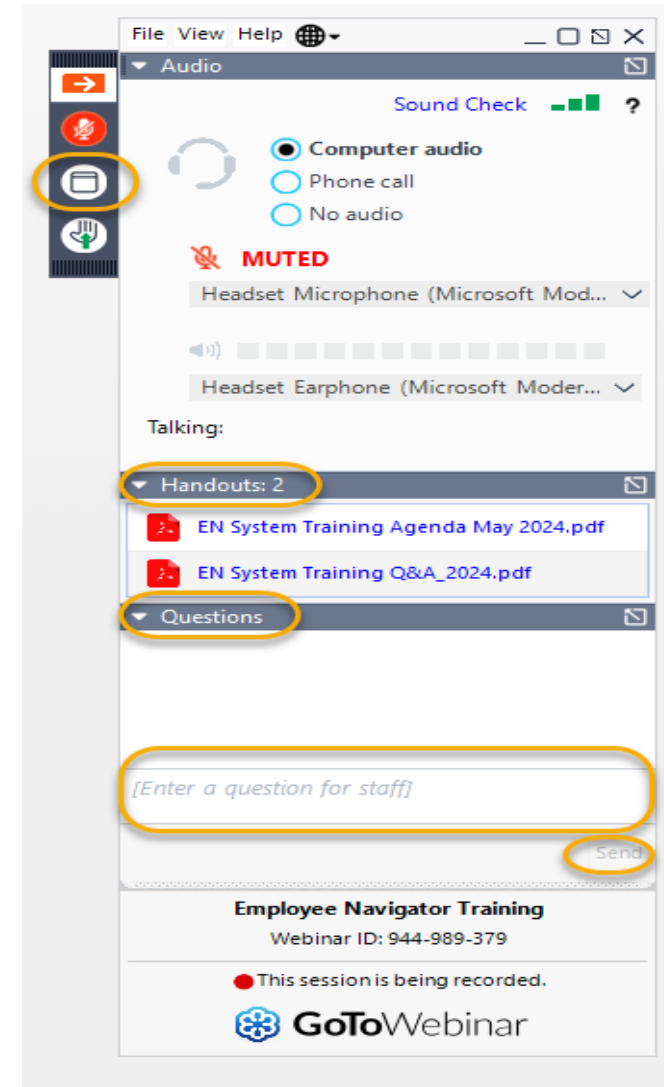
Employee Navigator System Training

Day 1



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

- **Welcome**
- **Employee Navigator Resources**
 - Video Library
 - AI Assistant
 - Knowledge Base
 - Support Team
- **Configuring a company**
 - Add a company
 - Company profile
 - Class structure
 - Payroll groups
- **Establishing plan rules**
 - Plan eligibility rules
 - Default eligibility rules
- **Setting up basic plans**
 - Build a basic plan from scratch
 - Build a basic plan from the rate library



Getting starting

- Employee Navigator has been working hard on feature parity
 - We have done a poor job communicating the Ease features added to EN
 - Summaries of the featured already completed are being posted every 1-2 weeks
- Same software, but organized differently
 - Employee Navigator's robust infrastructure & vast integrations
 - Ease's broker friendly features such as Carrier Forms
- Migration: you can plan on renewing cases on Ease for January 1
 - Don't worry, about moving companies....no sunset date has been set
 - We won't disrupt your business



Employee Navigator Resources

Focus on learning, we've got support covered

- New video library: 30+ 2-minute videos
- AI Assistant: Answering 1,000+ questions a day
 - 97% accuracy
 - All AI responses are reviewed; source documents are updated daily
- Lastly: our average answer time < 20 seconds



Configuring a Company

Adding a company

- **Three Options**

- Add a company from scratch
- Add from the library
- Add from existing

- **What's required to add a company?**

- Company name
- Unique Identifier
- State
- SIC Code
- Users



Company profile

- Brought to the company Settings tab immediately after the group is created
- It's best to complete company level configuration *before* configuring plans
- Required fields are already complete, but you can (and should) add more info
- Need more info?
 - [Knowledge Base: Company Profile](#)



Class structure

- Class Structure is the “heart” of the company in Employee Navigator, driving employee identification, the Rules Engine, enrollment, reporting, and system features
- There are 8 primary categories that can be used to create the company structure
 - While each category can have variable identifiers, an employee can only be assigned 1 identifier at a time under each category
 - Categories are:
 - Classes
 - Departments
 - Divisions
 - Business Units
 - Offices
 - Dynamic Classes
 - Job Classifications
 - Geographic Areas
- Need more info?
 - [Company Setup: Class Structure](#)



Payroll groups

- Set pay frequency for accurate per pay period cost display for employees
- Setting up a payroll group is required
- Setting up a payroll calendar is required, when:
 - Company offers plans that have IRS max limits or pro-rated employer
 - Employee pay frequencies are different than ee cost deductions
 - All benefits don't have the same pay deduction frequency
 - All employees assigned to the same class are not paid on the same pay frequency.
 - You have a PTO policy where accruals are based on pay date
 - You plan to integrate payroll with one of our [connected partners](#)
- Need more info?
 - [Payroll: Setup](#)



Establishing Plan Rules

Plan eligibility rules

- All plans require eligibility rules before turning it on for enrollment
- These rules determine which employees are eligible for a plan, what the new hire waiting periods are, and when coverage should end for terminated employees
 - Also include rehire rules, demographic change rules, and plan eligibility overrides
 - Dependent Care FSA, parking, and transit plans require employee change frequency, too
- Important Note: the system calculates an employee's hire date as day 0
- Need more info?
 - [Base Plan Setup: Eligibility Rules Tab](#)



Default eligibility rules

- The Default Eligibility Rules tool is designed so users only need to configure eligibility rules once, then pull them into a plan with the click of a button
- Create standard or benefit specific rules
 - Use standard rules as your “all” benefit eligibility rules
 - Use benefit specific rules when there are variances in benefit types
 - When creating a plan, the system will apply any benefit specific default rules; however, if one doesn't exist, the system will apply the standard rule
- Need more info?
 - [Default Eligibility Rules](#)



Setting Up Basic Plans

Building from scratch

- Basic plans include medical, dental, vision, and many more plan types
- Start with only a template of the benefit.
- All details about policy information, eligibility, and costs must be manually entered by the user.
- Used when you need to fully customize the plan or when the plan is not available in the Rate Library.



Using the rate library

- Allows you to create or renew small group medical plans using pre-populated carrier plan rate and benefit summary details
- Available for ACA or composite-rated plans that do not require underwriting, customized rates, or specific benefit services for a group or company
- This method saves time since much of the plan information is already filled in for you
- Need more info?
 - [Rate Library: Simplifying Small Group ACA and Composite Rated Medical Plans](#)



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