



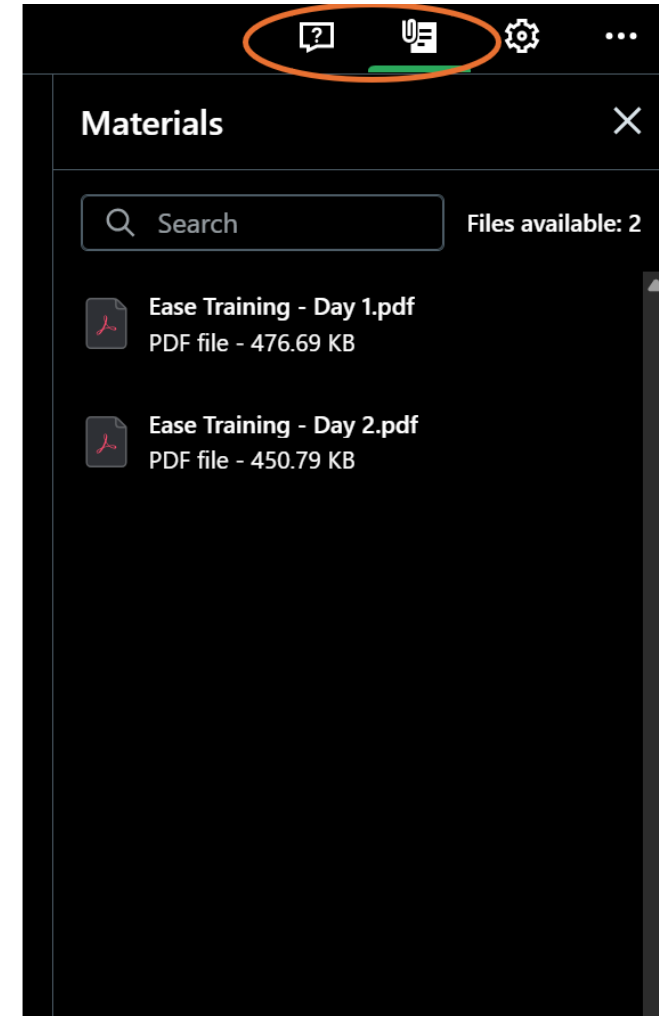
Employee Navigator System Training

Day 3



Tips for using your panel tools to engage

- View in full screen
- The slide presentations 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 [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

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

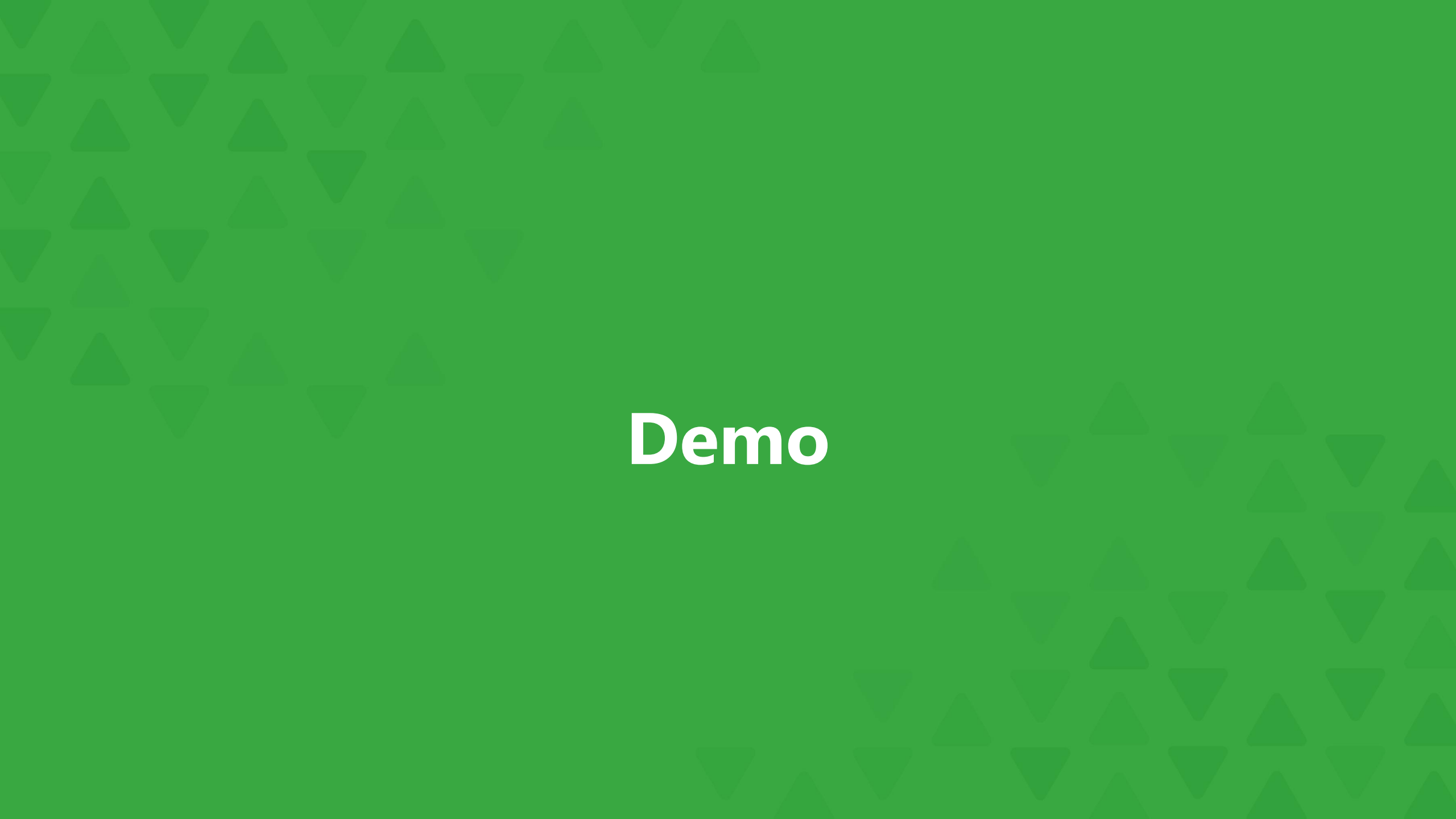


Testing the build

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





Demo

**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

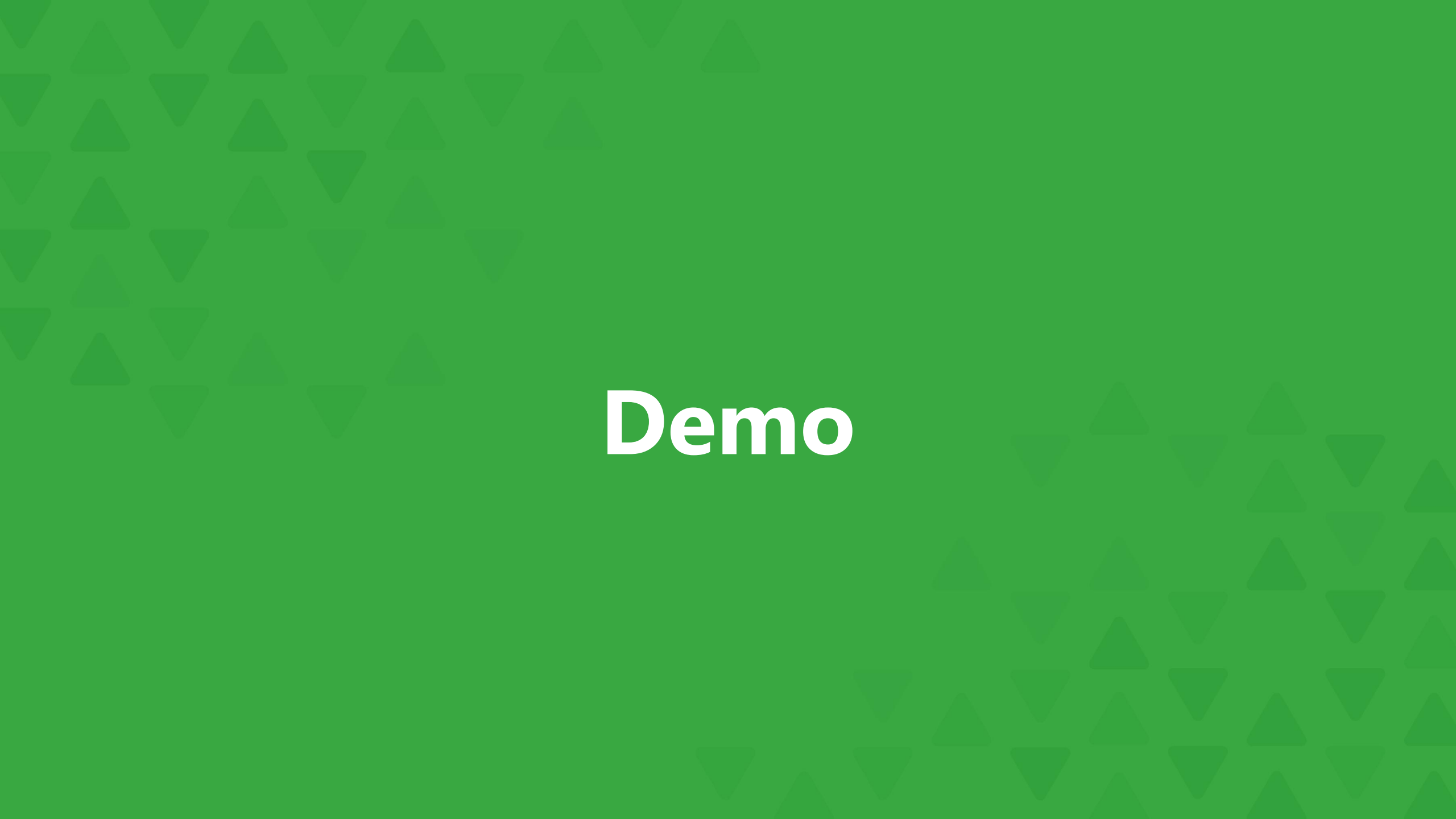
- Updating Demographics
 - Must include: SSN, First Name, Last Name
 - Use Demographic Update import type for eligibility-impacting changes
 - Include correct Effective Date
 - For payroll-integrated groups, do not import terminations
- Dependent Updates
 - Without SSN, name must exactly match existing 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 Tools

- Designed to help admins manage enrollments more efficiently
- Used during:
 - New implementations
 - Open Enrollment
 - Carrier Transitions
 - Large enrollment corrections
- Bulk Enroll – used for ER paid benefits where eligible employees should be enrolled.





Demo

Enrollment management

The Wall

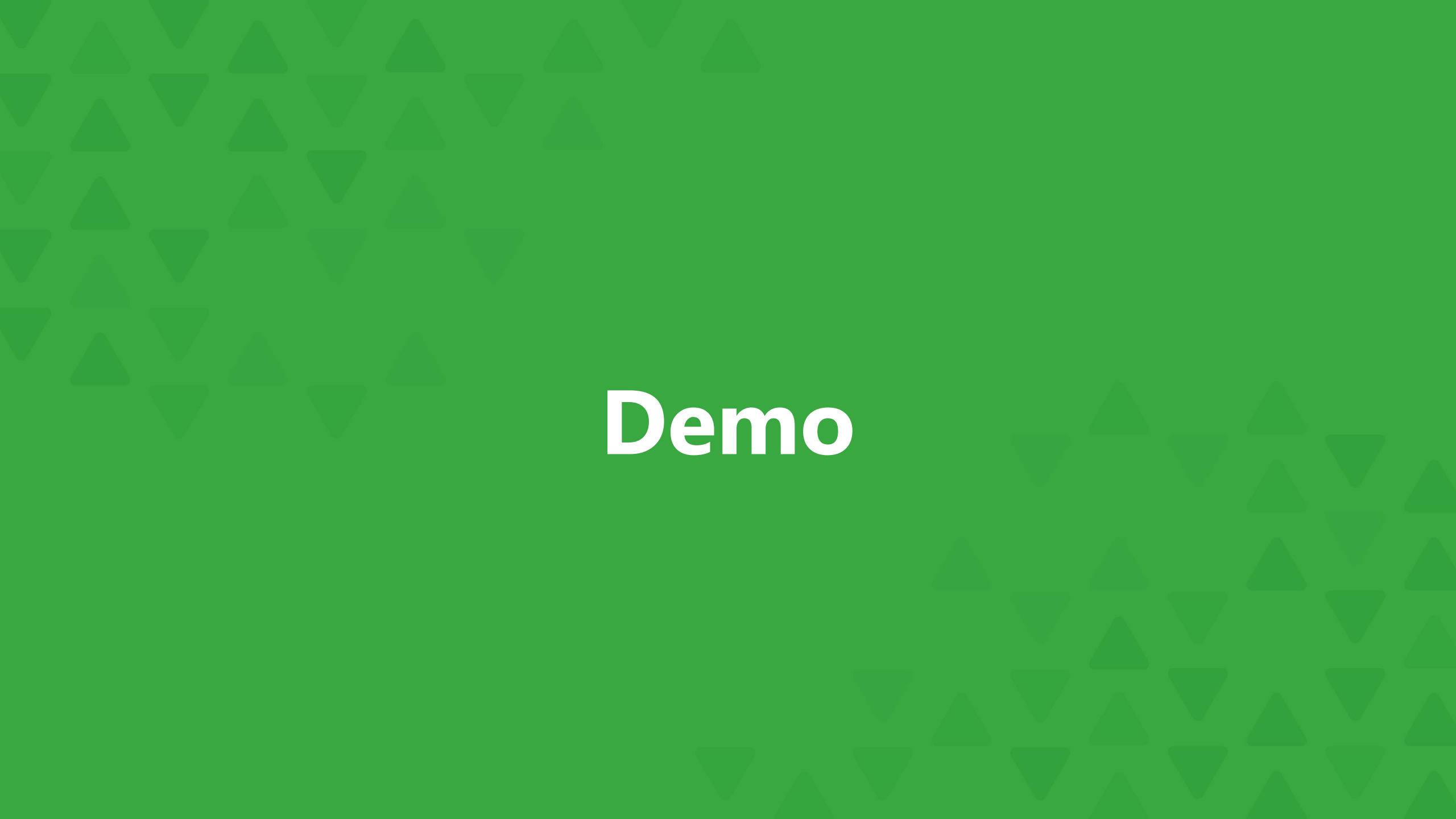
- Tracking Enrollment Changes
 - Triggers events for manually processed plans only
 - Event groups include: Add Coverage, End Coverage, Cost/Benefit Changes, Name, SSN, DOB, Address
- Allow HR Users to View Events
 - Licensee users see events automatically
 - Set to Yes if Company HR should see and process events
 - Set to No to restrict HR access
- Enrollment Changes Managed By
 - Assign processing responsibility: HR Admin, Broker, or Support Partner
 - 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 your 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





Demo

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