



TRAINING

Employee Navigator System Training

Day 2



BEFORE WE BEGIN

Tips for using your panel tools to engage



View in full screen



The slide presentations are available to download in the Handouts section



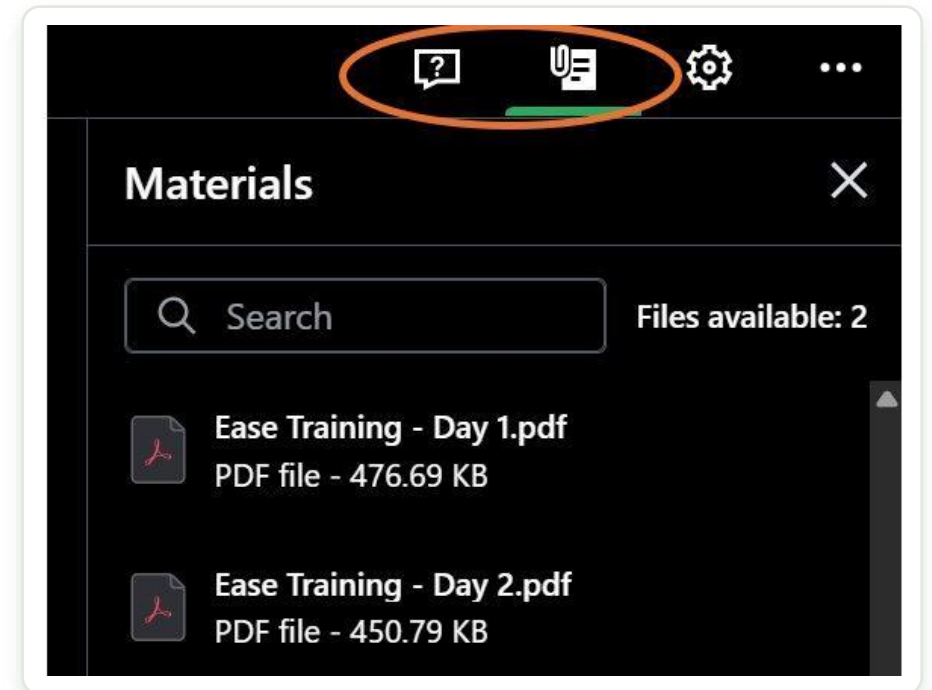
All participants are in “listen only” mode



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



Materials panel — download the handouts here



AGENDA

What we'll cover today



Day 1 Recap



Setting up life and disability plans

Build group and voluntary life and AD&D · Build group and voluntary disability plans



Setting up cafeteria and HSA plans

Build one cafeteria plan · Build an HSA plan



Plan communication tools

Adding plan documents



LOOKING BACK

Day 1 Recap

✓ What we covered yesterday

- Created a new company, from scratch
- Built a payroll group and calendar
- Built a medical plan using the AI Plan Build Tool and Rate Library

🤖 We covered a lot, but don't worry — we're here to help!



SECTION 01

Setting up life plans

01



Group Life and AD&D

Group Life and AD&D

- Group Life and AD&D can be built separately from each other, or combined
 - Check with your carrier which it should be!
- Supported in the Group Life and AD&D benefit:
 - Employee Primary Beneficiary assignment
 - Guaranteed Issue / Evidence of Insurability — your carrier may be integrated for EOI
 - Dependent life
- Can differentiate benefit structure across class structure within one plan — no need to build more than one plan!
- The carrier will have rules you need to confirm regarding rounding — keep these for future reference, as they are not group specific
- Auto enrollment is available for Group Life when: enrollment is required and there are no Guaranteed Issue rules

Need more info? Plan Setup: Group Life Insurance



Voluntary Life and AD&D

Voluntary Life and AD&D

- Voluntary Life and AD&D can be built separately from each other, or combined
 - Check with your carrier which it should be!
- Supported in Voluntary Life and AD&D:
 - Employee Primary Beneficiary assignment
 - Employee, spouse and dependent benefits
 - Guaranteed Issue / Evidence of Insurability
 - Enrollment grace periods
- The carrier will have rules you need to confirm regarding rounding, age reductions, age band changes, and more — keep these for future reference, as they are not group specific

Need more info? Plan Setup: Voluntary Life Model



The background is a solid green color. It is decorated with numerous small, light green triangles of various sizes, some pointing up and some pointing down, scattered across the entire surface. In the center of the image is a large, semi-transparent green circle. Inside this circle is a white compass rose with four main points and four smaller points in between, creating an eight-pointed star effect.

SETTING UP LIFE PLANS

Demo

SECTION 02

Setting up disability plans

02

Group Disability

Group Disability

- STD and LTD disability products available
- Can differentiate benefit structure across class structure within one plan — no need to build more than one plan!
- Auto enrollment is available when enrollment is required

Need more info? [Group Disability Plans](#)



Voluntary Disability

Voluntary Disability

- Can build STD or LTD
- Can build standalone voluntary disability or a buy up
- Offers Guaranteed Issue rules

Need more info? [Voluntary Disability Plans](#)



The background is a solid green color with a pattern of small, light green triangles pointing in various directions. In the center, there is a faint, larger green compass rose with four main points and four smaller points in between.

SETTING UP DISABILITY PLANS

Demo

SECTION 03

Setting Up Cafeteria and HSA Plans

03

Setting Up Cafeteria Plans

\$ Cafeteria Plans

- Includes: FSA, Limited Purpose FSA, Dependent Care FSA, Parking, Transit, Private Insurance and Adoption Assistance
- Provide key details such as minimum and maximum elections, pro-rating, employer contributions, run-out periods, grace periods, and admin fees

Need more info? Plan Setup: FSA, Dependent Care, Limited Purpose, Parking & Transit



Setting Up an HSA Plan

\$ HSA Plans

- IRS annual maximums and over-55 catch-up rules are hard coded
- Configure details including: if employee is allowed to decline, employer funding type, if medical enrollment is required, and if employees can contribute
- Funding types are crucial to get correct — you can only have one employer funding type per plan
- Key notes:
 - Funding dates cannot be changed after enrollment
 - Contribution calculations vary by funding type
 - Lump sum and semi-annual plans have no proration
 - Do not recommend multi-year plans

Need more info? Plan Setup: HSA



SETTING UP CAFETERIA AND HSA PLANS

Demo

SECTION 04

Plan Communication Tools

04

Adding Documents

Document Dashboard

- Shows all active documents
- Can filter by status (active, inactive, or unassigned) or category (HR or plan-specific)

EASY UPLOAD STEPS

Add document



Assign to employees



Set HR/Plan Options



Activate



Save

Plan Related Settings

- EOI, SBC, Show in Enrollment, Required
- Link documents to specific benefits, carriers, plan types, or plans

Need more info? [Managing Company Documents](#)



Plan Communications

Plan Communications

- Available in the build communications or on the left navigation menu on the company Benefits tab

Category Overview

- Allows for text and/or video upload
- Allows for separation of communication between current and open enrollments

 **Also see: Adding Videos**

Need more info? Benefits: Plan Communications



The background is a solid green color with a pattern of small, light green triangles pointing in various directions. In the center, there is a faint, larger compass rose graphic with four main points and four smaller points, also in a light green shade.

PLAN COMMUNICATION TOOLS

Demo

LOOKING AHEAD

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 & via integrations

Thursday

- Renewing and hosting open enrollment
- Daily HR management
- Employee Navigator's support resources





Q & A