



TRAINING

Employee Navigator System Training

Day 4



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



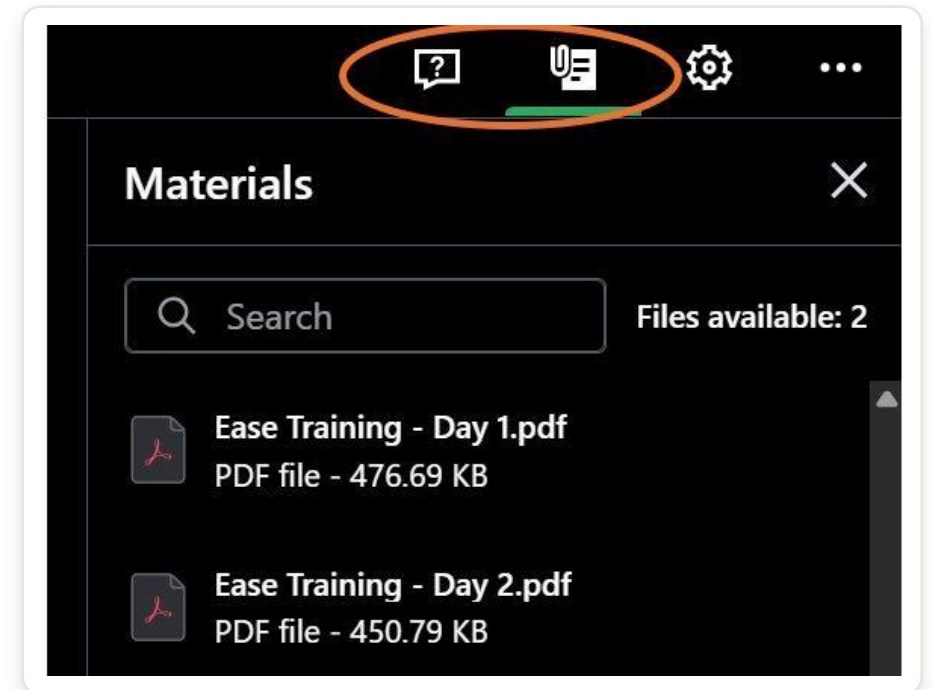
All participants are in “listen only” mode



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



Recap



The open enrollment process



Preparing renewal plans



Creating the open enrollment dashboard



Checking the status of open enrollment



Employee Navigator's support resources



Weekly Recap, So Far

✓ Everything we've built so far

Company configuration

- Our demo group 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

Let's finish with our forms feature today!

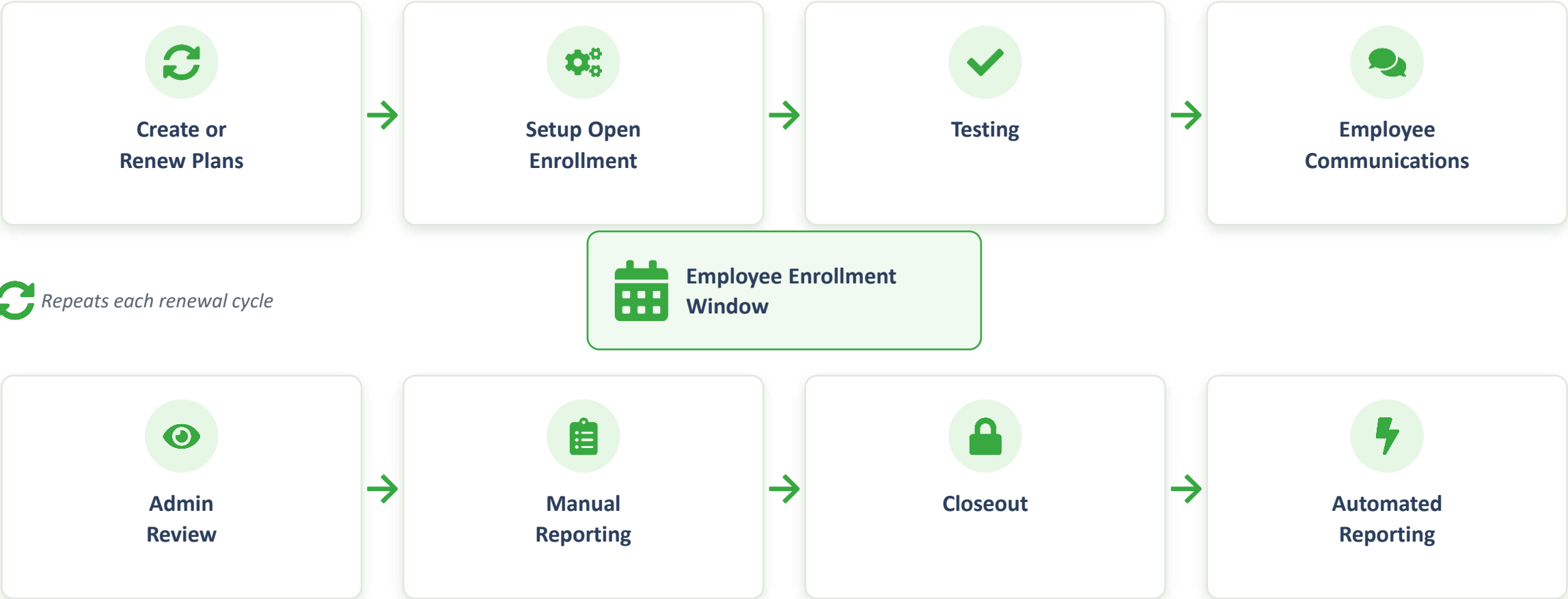


SECTION 01

The open enrollment process

01

Open enrollment lifecycle



SECTION 02

Preparing renewal plans

02



Preparing plans with AI plan builder

Renew with AI

- No carrier change
- No major plan changes
- Best renewal reporting
- Faster renewal setup
- Carry forward plan customizations

Build with AI

- Existing carrier or carrier change
- Any level of plan changes
- New benefit offerings
- AI builds accurate plans in minutes
- Faster than copy & review



Preparing renewal plans



Build with Rate Library

- Quickly import small group ACA or composite rated medical plans
- Pull from a maintained library
- Automatically includes benefit summary text
- Reduces manual plan entry and formatting
- Improve consistency across plans



Copy

- No carrier change
- Plan has major changes
- Useful for adding plan options or duplicating a plan
- Manual review required



Common mistakes to avoid

MISTAKE	WHY IT HAPPENS / NOTE
 Extending existing plans vs renewing	• <i>Deductions/Effective Date inaccurate</i> • <i>Incomplete reporting</i> • <i>Exception: Issue-age & Third-party app</i>
 Forgetting to activate future dated plans	<i>Enrollments cannot be created in inactive plans</i>
 Inactivating current plans manually	<i>They will automatically deactivate during closeout</i>
 Renewing plans with carrier changes	—



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 between them.

PREPARING RENEWAL PLANS

Demo

SECTION 03

Creating the open enrollment dashboard

03

Open enrollment dashboard

Steps 1–4 · Configure settings

- 1 Effective Dates**
Sets the enrollment window, effective date, and Admin End date; includes OE Unlock options.
- 2 Plans**
Controls which plans are included in the OE session.
- 3 Ending Plans**
Defines how plans ending 1 day before the OE effective date are handled. No action needed if none are ending.
- 4 Payroll**
Required only for companies actively integrated with a Payroll Partner.

Steps 5–7 · Launch & manage

- 5 Activate Open Enrollment**
Turns the session on once setup is complete, so HR/Admin can review and test the OE experience before go-live.
- 6 Notifications**
Schedules and generates OE launch and reminder notifications.
- 7 Report**
Grants access to OE-specific reporting.



Dashboard settings & new hire unlock

What administrators see and control during Open Enrollment

Future demographic changes

- Shows the current setting on the dashboard and links directly to change it
- Auto-disables when new plans are added, to avoid discrepancies with carrier files
- Timing matters: an election made before a scheduled change won't recalculate — it must be re-saved

New hire / newly eligible unlock Applies only to employees with an eligibility start date on or after the OE effective date, letting them enroll on their own eligibility window instead of the OE window.

Manual Unlock & Reporting

Completed per employee; admin opts out of wall notifications for this period. Use the Enrollment Change Report to review changes after OE ends.

Automate Unlock & Notifications

Automatically unlocks the window for new hire / newly eligible employees; admin receives wall notifications (wall feeds must be enabled).



Passive enrollment logic & processing

How the system decides — and what happens when an employee takes no action

*Decision logic: Is there an active enrollment in the current plan? → Is there an active decision recorded in OE?
Yes to question 1, No to question 2 → ending-plan rule applies. Yes to both → employee is skipped.*

Passive enrollment

*Runs twice — 1 day prior to Admin Ends date +
at Closeout*

Ends current enrollment → creates enrollment
in the new plan, effective the next plan year.

Passive decline

Runs once — At Closeout

Ends current enrollment → creates a Decline
in the benefit category.

End enrollment

Runs once — At Closeout

Ends current enrollment; the plan stays in
Current status with an end date.

Applies only when the employee is enrolled in an ending plan and takes no action; an active decision by employee or admin always overrides passive processing.



Reminders & best practices for ending plans

Guardrails to keep in mind, and why Employee Navigator recommends an active OE



Passive enrollment reminders

- Will not apply to employees with an active enrollment decision
- Ineligible employees (fail eligibility rules, ACA eligibility, or age restrictions) will not be passively enrolled
- Ineligible employees instead have their current enrollment ended at Closeout, with the coverage end date set to the ending plan's last day
- The passive enroll job creates an OE record in the default plan, mirroring the current tier level and/or benefit amount
- Can be executed multiple times but only ever applies (creates an enrollment) once



Why an active OE?

- Supports HR's desire to communicate better with employees about benefits
- Gives brokers the opportunity to sell additional benefits
- Encourages educated, deliberate employee decisions



OE communications

Two areas to manage employee communication during Open Enrollment

Home page message

- Displays to employees as soon as they land on their Home Page during the OE window
- Manage under Employees > Communications > Company Message
- Add a new message and set Type to “Welcome Open Enrollment [Home Page]”

Email templates

- Manage year-round under Settings > Email Templates, or in-session via OE Setup > Send Notifications > Manage Templates
- First time only: Settings > Email Templates > Open Enrollment > Edit > Save — this surfaces the OE notification
- The Send Notification tool in OE Setup pulls and sends templates regardless of where they were created

Automated reminder emails

- Go to Benefits > Open Enrollment > Edit > Reminder Notifications, then choose when to send an Ending Soon reminder — Never, 2, 5, 7, 10, 14, 15, 21, or 30 days before the end date
- Reminders repeat daily until the employee clicks Agree on the Enrollment Summary or the window closes



OE email templates

A default template is provided — customize it to fit each client’s needs

✓ What to Include

- Open Enrollment dates
- Requirements for maintaining enrollment (Active vs. Passive)
- Major plan changes
- Plan effective dates

HELPFUL TOKENS

First Name	Last Name	Company Name	Username	Login URL	Registration URL	Company Id
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CREATING THE OPEN ENROLLMENT DASHBOARD & SENDING OF COMMUNICATIONS

Demo

SECTION 04

Checking the status of open enrollment

04



CHECKING THE STATUS OF OPEN ENROLLMENT

Open enrollment status reports

Where to find enrollment status data, and what each status means

LOCATION	WHAT'S PROVIDED
Reports → Open Enrollment Reports — select “Open Enrollment Reports”	The status of an employee’s progress

STATUS TYPES

	Can't start	Missing one or more HRIS required fields — very important to correct!
	Not started	OE window can be accessed but no enrollment action has been taken.
	In process	At least one enrollment step has been saved/confirmed; still a work in progress.
	Completed	Completed all plan selections and signed their Enrollment Summary.



CHECKING THE OPEN ENROLLMENT STATUS

Demo

SECTION 05

Employee Navigator's support resources

05

Tools for training and troubleshooting

System Help Tool

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

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



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

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**Thank you for attending System
Training!**