

FAQ's (Search your key term)

Question:

Why doesn't my employee see the 'sign' step?

Answer:

This is likely due to the broker or group administrator assisting the user going to the employee's Benefits tab > Actions = and clicking 'View As Employee'. Please note, in this view, you **will not** see the option to sign as you cannot sign on behalf of the employee. The sign step will only show to the employee as they, themselves are logged in and go through and/or finish their enrollment.

If the employee is logged in and cannot see the sign step, please have them send a screenshot of where they are getting stuck in their enrollment, then create a ticket and include this screenshot for assistance from Support.

Question:

Why didn't the employee's enrollment status change?

Answer:

If the enrollment status did not change for an employee this could be because the employee completed a QLE and enrollment status only changes with OE and/or New Hire enrollments, when an administrator makes the changes on behalf of an employee, or the broker/administrator resets the employee status after they complete their enrollment.

You can manually set the employee's enrollment status to Finished in the employee's Benefits > Settings.

Question:

Why when I reinstate an employee's terminated benefits does the "old plan" display even though they are no longer eligible for it?

Answer:

If an employee's benefits were terminated because their eligibility changed, i.e. moved to a new job class such as manager, with different benefits and/or contributions, the operation to reinstate benefits is actually an operation to reinstate benefit type eligibility versus reinstating a specific plan.

- If reinstating eligibility for a benefit type, you must choose the previously enrolled plan as you cannot reinstate a benefit in which an employee has not been enrolled.
- Once this benefit type eligibility is reinstated, the employee may enroll in the plans for which they are currently eligible.

For more information about reinstating benefits, see [Reinstate Employee Benefits \(Employer User\)](#)

Question:

What are the proper steps for setting up a COBRA employee?

Answer:

In Ease there are two scenarios of marking an employee as active with COBRA coverage:

- Eligible COBRA Employee - Active COBRA TPA
 - Terminate the employee in Ease with the appropriate termination date. Use the "Terminated" status in this scenario, not "COBRA."
 - The Ease TPA feed will push the updated employment information to the COBRA TPA.
 - Once the TPA receives the information, the TPA will send the COBRA notice to the employee.
- Eligible COBRA Employee - No COBRA TPA
 - Terminate the employee in Ease with the appropriate termination date.
 - Update the employment status from "Terminated" to "COBRA"
 - Input the "COBRA Date"
 - Optional: change the employee's pay cycle to "Monthly" if COBRA deductions should appear monthly

For additional information on how COBRA works in Ease, please see the below Support Community articles:

[COBRA Eligible Plans \(Broker User\)](#)

[COBRA Start Date \(Employer User\)](#)

[COBRA Severance Through Date \(Employer User\)](#)

[Terminate Employee \(Employer User\)](#)[Third Party Administrator \(TPA\) Connection \(Broker](#)[User\)](#)

Question:

Is Open Enrollment set up correctly?

Answer:

When verifying your Open Enrollment is configured correctly, it is always best to verify the following key fields in your employer group's benefits configuration:

- Open Enrollment Period
- Open Enrollment Plan Selection
- Plan Details
- Locked Enrollments

To ensure your group's Open Enrollment period is set up correctly, make sure all of your plans in the Benefits tab are completed, your Open Enrollment dates are set with the renewal plans chosen in Customize Plans for Enrollment, and none of your employees are manually locked via the group's Benefits tab > Lock Enrollment.

Question:

How do I approve a GI amount?

Answer:

You can add an approved Guaranteed Issue Amount to individual profiles and by import. To update an employee's individual record, head to the employee's Benefits tab, then go to the subtab Settings, scroll to the Guaranteed Issue - Total Approved Benefit Amount

section and select “Add Amount.” In the dialog box, select the exact Plan Type that you built in your group.

For example, if you built a Voluntary Life/AD&D plan, you cannot use the GI approval plan type of Voluntary Life, Life, Supplemental Life, etc. You must use Voluntary Life/AD&D. Add the approved amount with the date it was approved and save.

Here is a video for your reference that also includes importing GI Amounts: [How to Add Guaranteed Issue Amounts](#)

Additionally, our article [Update Total Approved Benefit Amount \(Employer User\)](#) will provide additional information on this process of adding an approved GI amount.

Question:

How do I change the effective date for an employee?

Answer:

If the employee is already enrolled in benefits, you can manually adjust the employee’s effective date:

- - Navigate to the employee’s Benefits tab
 - Select the applicable line of coverage on the left side of the Enrollments page
 - Scroll to the “Administration” section at the bottom of the Enrollments page
 - Input the appropriate effective date in the “Effective Override” field
 - Click the “Save” button

Note: You must complete this action separately for every line of coverage.

For employees who have not enrolled in benefits, you can update the “Benefit Eligible Date” for all lines of coverage by:

- Navigating to the employee’s Benefits tab
- Click on the Settings tab
- Input a Benefits Eligible Date

Note: This page will auto-save after inputting the new date

Tip: You should remove this date after the employee makes benefit elections.

Question:

How do I do a Qualifying Life Event (QE/QLE)?

Answer:

Brokers are able to create Qualifying Life Events (QLE) and process enrollments for the QLE on behalf of employees in Ease. To do so, you will need to first create the QLE event for the employee and then create the QLE enrollment on behalf of the employee.

- Create QLE Event
 - Select the employee from the “Employees” tab
 - Select Benefits tab
 - Click the Actions dropdown on the right side of the page
 - Click “Add Qualifying Event”
 - Input the Event in the dropdown
 - Input the Event Date
 - Add the corresponding QLE details in the text box

- Click the “Add Event” button
- Create QLE Enrollment

- Search for the “Administration” section on the Enrollments page
- Click the dropdown under “Qualifying Event” and select the corresponding QLE
- Click Save

To allow the employee to complete the QLE on their own and sign their forms, you would first need to make sure the employee’s portal is unlocked to make changes.

- Head to the group’s Benefits tab
- Find the Lock Enrollment tab in the menu below Benefits
- Find the employee on the list
 - If the employee is in the Red status: Add an “Unlock Date” in the box to the right of the employee’s name. This date will open up the system for the employee for 30 days. You may change this if you need to allow more time for the employee to make changes. This does not need to match the QLE date because the employee will put the date of the event in when they complete the QLE process upon login.
 - If the employee is in the Yellow status: The employee is already unlocked and can make a change without an Unlock Date

Once the employee logs in, they can create their own QLE:

1. First, have the employee head to their Benefits tab
2. Click the Actions button on the right
3. Click “Change My Benefits”
4. From the dropdown that appears, select “Change Coverage”
5. When the system asks if the employee had a qualifying event, select “Yes”

Note: Employees cannot create a QLE during Open Enrollment and must wait to make elections either after enrollment or the changes can be administratively done.

Question:

How do I correct a benefit termination date?

Answer:

When an employee is terminated using the incorrect Event Date, the employee needs to be rehired using their original Hire Date, the elections re-saved, and then terminated with the correct date.

To do this, go to the employee's Profile tab, then find the Employment section in the menu below that. From there, select "Rehire Employee" and use their original hire date as the effective date. This will then restore the benefits back to waived. Be sure to enroll them back into the benefits that they had, enter the effective date into the Effective Override and Activity Date fields, and click Save at the bottom of the page.

If you are unsure what benefits they had, you can generate an Enrollment History report by going to the Benefits tab, clicking the Actions button, and selecting Enrollment History.

Once the employee's profile and benefits have been reinstated, terminate the employee by going to their Employment tab and selecting "Terminate Employee." Be sure to enter the correct termination date.

We also recommend reviewing the History tab of the employee to ensure all of the information is correct. If there is any information that is wrong, please take a screenshot of the page for reference and delete the incorrect fields. You can also add additional information by clicking Actions > add Employee History.

Question:

How do I set up a passive open enrollment?

Answer:

Ease does not have an explicit 'passive' or 'active' automatic open enrollment option. If your group is having a passive enrollment, you can either manually enroll each employee via the employee's Benefits tab or via import.

If your group's renewal is a passive open enrollment, you can choose the option to duplicate a previous plan and push the enrollments from the previous plan to the renewal plan as this will effectively push the current enrollments to the new plan year.

Question:

Why can't my employee(s) see benefits?

Answer:

Most often if an employee cannot see benefits, it is because the plan configuration makes them ineligible for the benefit via the plan's Eligibility tab. This could be because the employee's Department is not included in the plan, the employee has no scheduled hours but it's built into the plan, etc...

This could also be that the employee's effective date is after the plan's end date and in this case, you would need to create the new plans in the group.

To determine why an employee is not eligible for benefits, go to the group's Benefits tab > select the plans they cannot see > Reports > Eligibility. The Eligibility Report will list each employee and every plan, along with a reason they are ineligible for the respective plan(s) in the "Reasons for Ineligibility" column in the report.

Question:

How do I generate reports?

Answer:

You can generate reports via your Reports tab > Available. This will default to a list of your broker-level reports. You can select a group from the 'Company' dropdown to view company-specific reports, such as payroll deduction reports, enrollment censuses, or eligibility reports.

You can also generate group-specific reports from the group's Benefits tab. From that page, select the plans you would like included on the report, then select the report you would like to generate from the Reports dropdown.

Note: If you do not see a specific report in the group's Benefits tab, please check the Available reports section for more reporting options.

Question:

Why wasn't an employee's benefit change on the Open Enrollment Changes Report?

Answer:

Employees that either change their plan or their enrollment level of coverage will display on this report.

For example, if only the employee was enrolled in a plan in the previous year and in the renewal year they add a dependent, this is considered a change. If the employee was previously waived from a plan and then is now enrolled, this is also considered a change.

Note: This will only show changes that occurred **during Open Enrollment**. Our articles [Open Enrollment Changes Report \(Broker User\)](#) / [Open Enrollment Changes Report \(Employer User\)](#) will provide more information on how these changes will populate on this type of report.