

# Company Admin Checklist

## Notes

- Access this checklist online before each use. To ensure you are using the most current content, this article does not include a printable version.

## COMPANY

### ☐ Profile

Create and populate insurance carrier and ACA IRS-ready forms that require employer data

[Company > Profile](#)

### ☐ Organization

When applicable, benefit eligibility can be determined based on organization types

[Company > Profile > Organization > Locations, Divisions, Departments, and Job Classes](#)

### ☐ Pay Schedules

Automate remaining deductions, and track hours for ACA, and time-off accruals in HRIS

[Company > Payroll > Pay Schedules > Add Pay Schedule](#)

### ☐ Email Templates

Create and manage templates to be used when communicating with employees

[Company > Settings > Email Templates](#)

## EMPLOYEES

### ☐ Add Employee

Add individual employees

[Employees > Actions > Add Employee](#)

### ☐ Update Employee

Update employee information

[Employee > Profile](#)

### ☐ Profile

Employee personal demographic and contact information

[Employee > Profile > Personal](#)

### ☐ Employment

Details of employment to include organization types and compensation

[Employee > Profile > Employment](#)

☐ Benefits

Assist with enrollment, provide summaries and statements, and add other coverage or advanced settings

[Employee > Benefits](#)

☐ Documents

Add/maintain employee documents

[Employee > Documents](#)

☐ Login☐ Send Login

Send login information to employee(s)

[Company > Logins > Logins > Actions > Send Logins](#)

☐ Reset Password

Reset employee password

[Employee > Profile > Login > Reset Password](#)

☐ Import Employees

Import employee demographic, employment and/or enrollment information

[Company > Employees > Actions > Import Employees](#)

☐ Terminate Employee

Add date and details for employee termination

[Employee > Employment > Details](#)

☐ COBRA

Transition employee from terminated to COBRA

[Employee > Enrollment > Details](#)

## DOCUMENTS

☐ Library

Add and organize documents available to all employees

[Company > Documents > Library > Actions > Add Document, Link or Folder](#)

☐ Onboarding

Add documents and links for employees during onboarding.

[Company > Documents > Onboarding > Actions > Add Document, Link or Custom Document](#)

☐ Notifications

Add documents and links for which notification to employees is desired/necessary

[Company > Documents > Notifications > Actions > Add Document, Link or Custom Document](#)

☐ Custom☐ Create Custom Document

Create a document with custom text and/or fields from Ease

[Company > Documents > Custom > Add Document](#)

☐ Add Custom Document to Library

Add a custom document to Onboarding or Notifications

[Company > Documents > Onboarding or Notification > Actions > Add Custom Document](#)

☐ Send Document Review Reminders

Send emails to employees that have not reviewed or signed required documents

[Company > Documents > Library > Actions > Message Employees](#)

## BENEFITS

☐ Plans

View benefit plan information

[Company > Benefits > Plans > \[plan\]](#)

☐ Progress

☐ Enrollment Progress Track and manage enrollment progress

[Company > Benefits > Progress > Enrollment Progress](#)

☐ Onboarding Progress View onboarding progress for new hire employees

[Company > Benefits > Progress > Onboarding Progress](#)

☐ Message Employees Send an email message to new hires/enrollees that have not finished

[Company > Benefits > Progress > Actions > Message Employees](#)

☐ Open Enrollment

Manage benefits with Ease

[Company > Benefits > Open Enrollment](#)

☐ Lock Enrollment

Lock and unlock enrollment for the employee

[Company > Benefits > Lock Enrollment](#)

☐ Statements Generate a compensation statement for an individual employee

[Employee > Benefits > Statement > Generate Statement](#)

Generate statements for all employees

[Reports > Available > Compensation Statements](#)

☐ Qualifying Life Events Create a qualifying event to allow for changes to benefit elections for an employee outside New Hire or Open Enrollment

[Employee > Benefits > Actions > Add Qualifying Event](#)

☐ Terminate

Terminate benefits due to employment change or qualifying event

[Employee > Benefits > Actions > Terminate Benefits](#)

- ☐ Reinstatement Benefits Reinstatement employee's benefits eligibility

[Employee > Benefits > Actions > Reinstatement Benefits](#)

- ☐ Benefit Effective Date Override Correct/change benefit effective date using Effective Override

[Employee > Benefits > Enrollment > Administration](#)

## MANAGE CHANGES

- ☐ Changes

Options for managing demographic and enrollment changes in your company site.

[Company > To-Dos > Changes > Manage](#)

- ☐ Pending Elections

Information about how unsigned elections are handled in Ease.

[Company > To-Dos > Changes > Manage > Pending - Elections \(Not Signed\)](#)

## REPORTS

- ☐ Generated

All reports generated throughout Ease are accessed here

[Reports > Generated](#)

- ☐ Available Produce and access reports available in a company site

[Reports > Available](#)

- ☐ Employee Reports that provide employment related information for employees

[Reports > Available > Category = Employee](#)

- ☐ Benefits

Reports that provide benefits/enrollment data

[Reports > Available > Category = Benefits](#)

- ☐ Feedback Feedback provided by employees during onboarding and/or enrollment

[Reports > Feedback](#)