

Group Training Guide

This training document will highlight key areas to speak of during the initial ease training demonstration. Information contained in this guide is merely an overview and not a strict set of guidelines. Each group training will be individualized and centered around the needs of the group.

Documents to provide:

- Add_Employee.pdf
- Terminate_Employee.pdf
- Terminate_Employee_Benefits.pdf
- Reports.pdf
- Employee_Unable_To_Log_In.pdf
- Qualifying_Events.pdf

These documents will provide a backup in case the group administrator needs assistance with a future task. Additional documents to be provided at the group's request.

Meeting Agenda:

The agenda of an initial ease training consultation will highlight all areas of the backend admin portal. An overview will be provided of generalized features along with more specific explanations with commonly used tools. Using the guide below, format your meeting to touch on the majority of the topics listed here:

- General Profile To-do's and the OneDigital Eligibility Team
- Employee List and the basic functions associated with this tab (adding, terming, etc.)
- Benefits Tab and open enrollment tools
 - o Progress reports, extending and setting OE dates, Locking Enrollment.
- Adding and removing documents / notifications.
- Login tab and sending new hire login information.
 - o Creating email templates and sending mass email notices.
- Qualifying Event creation

Outreach and Connections:

Final tasks for the training consultation include resolving any errors in the build, assigning contacts for additional ease assistance, resolving API and EDI connection statuses as well as discussing any tasks to complete before Open Enrollment starts (if applicable).