Employee Enrollment Experience

For Pictures: https://ease-support.zendesk.com/hc/en-us/articles/4411477077645-Employee-Enrollment-Experience#h_01FGYS2CJNQGM2Y2CFBB019XN1

Reminder: Employees do not have access to support.

Purpose: While this solution is from the employee's point of view and contains images from an employee login, do not copy the material or the browser address. Use this information to (a) provide assistance to an employee or (b) download and provide .pdf version (see FILE ATTACHMENT below) and/or if available, youtube link (see VIDEO below) to an employee so they may use them.

Notes

The enrollment experience is the same for New Hire Employees and Employees enrolling during Open Enrollment or based on a Qualifying Life Event.

- If you need assistance, reach out to your Company Benefits Administrator.

- The amount of time an enrollment is open to an employee is controlled by the plan setup.

  - Open Company Enrollment

  - See Extend Open or New Hire Enrollment

- Once enrollment is started:

  - Left navigation denotes where you are in the enrollment process.

    - When Benefits is reached, plan types available for election are listed.

  - Right depicts the summary of your enrollment as you add elections including the benefit cost and total cost per pay period.

- New Hire Employees, when enrolling for the first time during Open Enrollment with eligibility for current plans as well as those available for Open Enrollment, will have to enroll in current plans first and will then be directed to continue and start Open Enrollment.

  - For example, John Smith is eligible for benefits (effective until October 31) as a new hire on October 1. Enrollment is open for all employees for benefits effective November 1.

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John must first enroll for October only in current benefits and follow up with open enrollment elections effective November 1.

- Clicking Continue at the bottom of each page while completing onboarding or enrollment is required to save selections.

- If the employee does not click Continue before leaving the page, a dialog box appears and prompts them.

- Click Save Changes, or if you wish not to save, click Continue Without Saving.

Instructions

From your Dashboard:

1. Click Start Enrollment.

2. Click Start.

3. View the introductory video.

4. Click Continue.

5. Enter/Update Personal Information.
   - Those marked with an ***** are required.

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6.   Enter/Update Physical Address.

7. Verify Employment Information and edit/update Additional Information.

8. Click Continue.

9. If dependents to be enrolled in benefits are not listed, click Add.

10. As necessary, complete Add Dependent information.

    o   Only one active spouse or domestic partner may be present in an employee record.

    o   If attempting to add a second souse or domestic partner, Ease displays an alert and does not allow the second dependent to be added.

11. Click Add Dependent.

12. Click Continue.

13. Click Review and acknowledge receipt for each document.

14. Click Continue.

15. If Medicare Coverage is enabled and you are covered by any Medicare options, click Add.

16. Complete Add Medicare Coverage information.

17. Click Add Medicare Coverage.

18. Click Continue.

19. If Nayya is enabled, complete steps 20 through 24; otherwise, continue with step 25.

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20. Click Get Started to review the Benefits Guide, which is a survey to help Ease recommend a benefits bundle for you.

21. Enter information on each subsequent page and click Next.

22. On the last page of the survey, a recommended bundle displays based on your responses to the survey. Using this recommendation is optional when selecting benefits.

23. Click Proceed to Enrollment.

24. Click Continue to Ease Enrollment.

25. Review your Benefit Allowance details.

26. Click Continue.

27. For Medical Plan, under Specify Your Coverage, status defaults to Enrolled for the employee and dependents.

28. To enroll a spouse or domestic partner when a medical plan surcharge applies, click checkmark next to name and answer "Yes" if they have been offered coverage by their employer or "No" if they have not.

    o The surcharge is added to the employee contribution amount.

    o Answering "No" when they have been offered coverage by their employer may result in loss of coverage or legal action for insurance fraud.

29. To waive coverage, click x in Specify your coverage.

30. Choose Waive Reason

31. If you have not added dependents but are waiving coverage for them, place check for Waived in Are you waiving dependents?

32. Under Select Your Plan, click Compare Plans to review a breakdown of plans and costs.

    o Note effective date and deduction cycle.

33.   Select Plan.

34. Enter PCP Name and PCP Id or mark Auto Assign to allow the carrier to assign one for you.

   - If you are renewing and have already provided details to the carrier, you may mark Current Provider.

35. Click Continue.

36. Repeat for all plan types.

37. Click Continue.

38. For life insurance and other plans such as critical illness or cancer, evidence of insurabililty may

   be required and enrollment may be listed as pending. Complete EOI as directed.

39. For HSA, FSA or Retirement plan types, contributions may be added either as an annual amount or as per pay period as well as as a dollar amount or % of income.

40. For life insurance plans, Ease displays your dependents as beneficiaries. If the names listed are your chosen beneficiaries, enter percentages for each. You must have at least one (primary) beneficiary. Total percentage must be 100.

41. To add a different or an additional beneficiary, click Add.

42. In the Add Beneficiary window, enter information and click Add Beneficiary.

43. As needed, enter percentages for each new beneficiary.

44. Click Continue.

45. If Previous & Current Coverage is enabled, click Add.

46. Complete Add Previous & Current Coverage information.

47. Click Add Previous & Current Coverage.

48.	Review the Health Information screen and provide additional documentation as needed.

49. Click Continue.

50. Review Benefit Summary.

51. Click Continue.

52. If missing information is noted, click to review as needed.

53. Click Continue.

54. Click Sign Forms.

55. Once forms are generated, type your full name as it appears in Create your signature.

56. Click Next.

57. Using mouse or touch screen, add a hand-drawn signature.

58. Click Next.

59.   Click Next.

60.   Review forms for completeness and accuracy.

61. Tap each green signature prompt as they appear.

62. Once complete, click Finish Signing.

63. Review additional supplemental insurance options if needed.

64. Click Continue.

65. For new hires, current-year benefits enrollment is complete at this point. If open enrollment is open for the next year, click Continue to Open Enrollment to complete elections for the following year.

66. Complete next year's enrollment and Finish Signing again.

67. Enter comments.

68. Click Submit Feedback.

End of Procedure