Setting Up a Connection

- Notes
- Plans cannot be connected while a group is in Open Enrollment (OE). The connection is initiated once OE closes.
- All plan and employee details must be present in order for successful transmission of enrollment data with EaseConnect or EaseConnect+.
- Only those ready to connect are available in Carrier drop menu.
- Instructions
- From To-Dos > Connections > Readiness
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- In Readiness, using Carrier and/or Company filters, display list of appropriate companies to review/manage readiness.
- Filter drop menu only displays Carriers that are ready to connect.
- In Plans Available to Connect, note Plan Type, Plan Name, Effective date and Policy Number associated with readiness for a connection.
- If Self-Billed plan, mark Self-Billed.
- In Required Information, note information Type and Name along with specific fields with Missing Information in order to establish a connection with carrier.
- Click Edit next to plan and update Missing Information.
- Clicking Name goes directly to the appropriate Plan Profile or Company Profile.
- Clicking linked Missing Information field name goes directly to the appropriate tab to update that specific data.
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- In our example, clicking Rates next to Life/AD&D, you are directed to the Rates tab for that plan.

- If ready to connect, choose Yes from Do you want to connect?
- A case is established for your CSM and the Ease Connections Team.
- For more information regarding automated carrier authorization forms, see Carrier Connection Authorization Form
- For more information about signing and/or assigning a form to the employer for signature, see Sign Carrier Authorization Forms
- To view/capture readiness information in a spreadsheet format, click Generate Report and access it from Reports > Generated.

- End of Procedure