ease

EQUITABLE
CONNECTION GUIDE

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BEFORE YOU BEGIN

Supported Products

The following products are supported by the connection:

- Dental
- Vision
- Life
- AD&D
- Short Term Disability
- Long Term Disability
- Accident
- Critical Illness

Required Information

In addition to the fields required by the Ease system, the following information must be provided for a complete submission to Equitable:

- The carrier name must be set to Equitable.

- The full 6-digit policy number should be included on the plan. If you are using multiple eligibilities, be sure this is included on each eligibility.

Other Important Information

- The Equitable feed runs weekly.

- The information in Ease will override the information in Equitable's system. Please ensure updates made with payroll or TPA partners are in sync with the data in Ease. If you make updates with Equitable; be sure these updates are also submitted in Ease.

SETTING UP THE CONNECTION

Enable Carrier Connection

First, make sure that the carrier is enabled for your agency. Then go to the employer you wish to enable the connection for and click on the carrier tile you wish to enable.
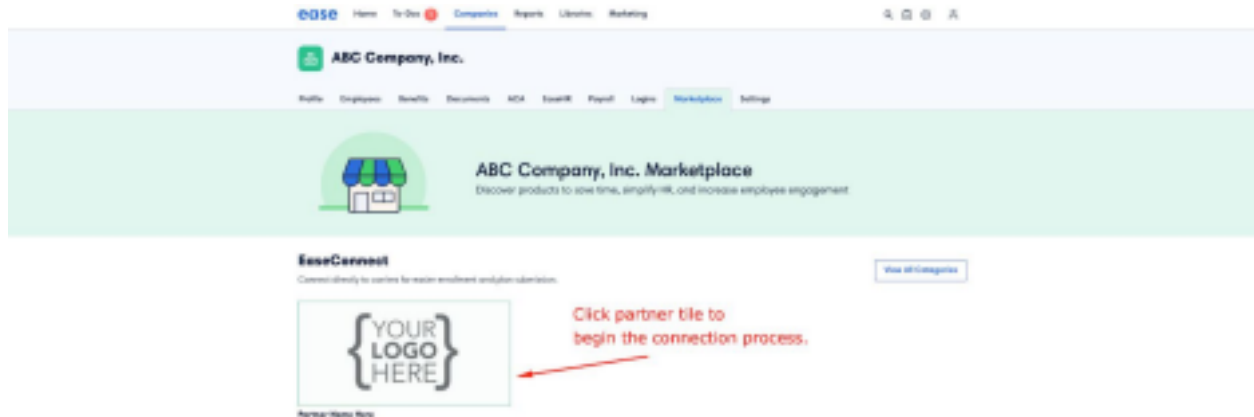
Add Submission

Once you've enabled the connection, you will be directed to the setup wizard which is only a few easy steps! Click Next to move forward through the process.

In order to submit a group to the carrier partner, you'll need to **Add Submission.**

The next step will be to select the plans you would like to connect, and be sure to select **Submit to Partner.**

SUBMITTING ENROLLMENT

Initial Submission

The initial submission, whether it's a new case or existing business, will be reviewed by the carrier for accuracy.

Testing

During this review stage you will see the connection status in "Testing." This means that the carrier is still reviewing the data for accuracy, participation, etc. You can find the statuses of your connections under **To-Dos>Connections>Status.**
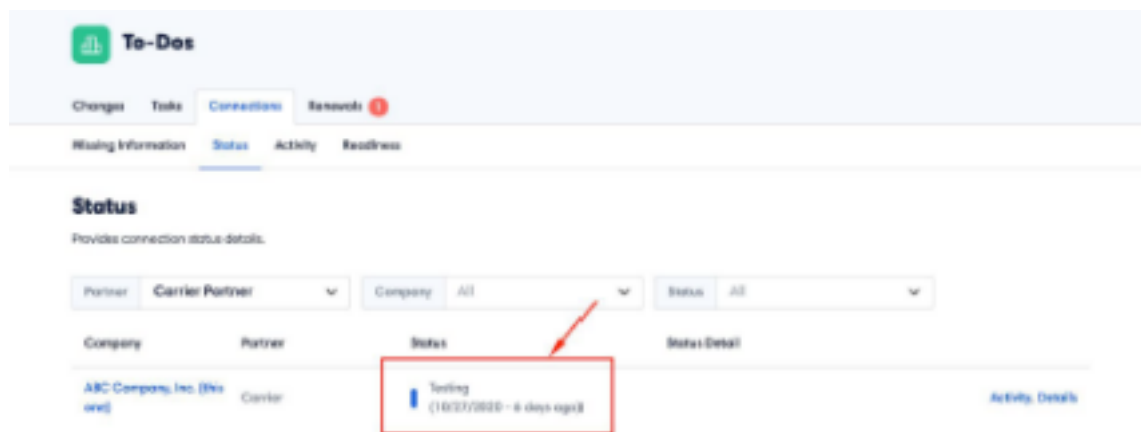
Approved

Once the carrier has verified the information and setup to be accurate, the group will be moved to an "Approved" status, upon which all adds, changes, and terminations will be sent directly to the carrier for processing. You can find the statuses of your connections under **To-Dos>Connections>Status.**

CONTACTS

Ease

Phone: (702) 800 - 2690
Ticket: https://help.ease.com
Live Support: Schedule Live Assistance