

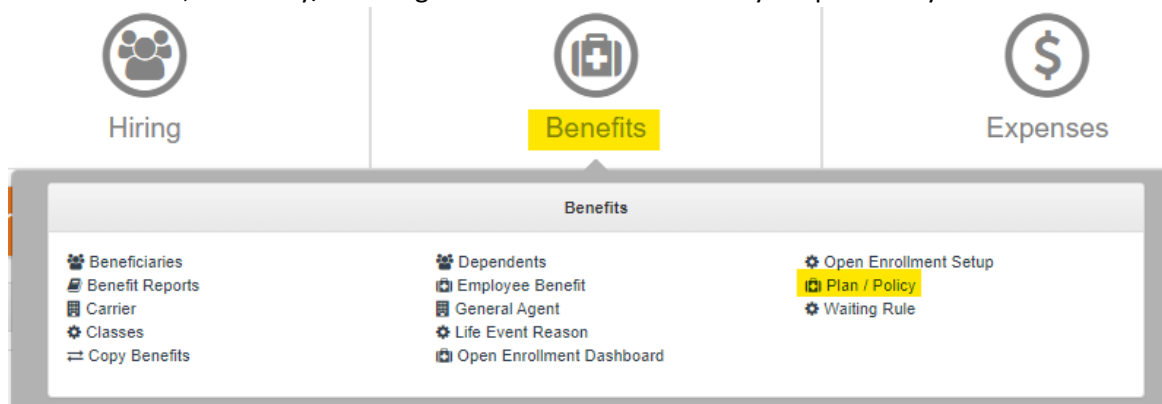
Annual Open Enrollment Setup

Annual Open Enrollment Setup is a 3-step process.

- 1.) Create your new plans for the coming year by adding new plans, (if your plans/carriers have changed drastically) or clone, (copy) your plans from the current year and rename them, (Example OE YYYY Plan Name) and save them. Open the cloned plan and make any rate adjustments, tier adjustments, eligibility rule adjustments that need to be changed and change the start and end date for the plan as appropriate.

If your payroll deduction codes have changed, you will need to change them on the plans also.

In other words, make any/all changes that have occurred with your plans for your New Plan Year enrollments.



Click on the Copy icon

Copy A New Policy / Plan From An Existing One		LTD	Long Term Disability	01/01/2022	12/31/3050	No	Yes
		MED1	2022 BC/BS 1	01/01/2022	12/31/2022	No	Yes

Change the plan Name, (Suggested YYYY Plane Name) & Start & End Date for the plan and any other information that has changed.

Save Changes

Prev Record

Next Record

Close

Benefit Plan / Policy: MED1 - 2022 BC/BS 1

Company

Company

Ginger's Pet Care (GMPC)

Plan / Policy Info

Active

No

Yes

Priority

1

Plan Code

MED1

Plan Name

2023 BC/BS 1

Plan / Policy Details

Plan / Policy Type

Medical - Medical Insurance

Used For ACA

No

Yes

Self Insured

No

Yes

Capture Provider Choice?

No

Yes

Is This A High-Deductible Plan?

No

Yes

Link To Provider Choices

Link To Provider Choices

Carrier

BC/BS

General Agent

Please Choose (represents BLANK)

Policy Number

Policy Number

Alternate ID

Alternate ID

Producer Code

Producer Code

Start Date

01/01/2023

End Date

12/31/2023

Renewal Date

Renewal Date

Website URL

Website URL

Website User ID

Website User ID

Website Password

Website Password

COBRA Eligible?

No

Yes

Add or change notes if using them, review your waiting rules and Eligibility groups for any changes that need to be made. Attaching any documents that you want included with the plan

Notes

Eligibility & Enrollment

Waiting Rule

30 - 30 days and first of month

Enrollment Restrictions

Restricted - Only certain eligibility groups (benefit classes) may elect this plan

Eligibility Group / Class	Available For Enrollment?
Executive	No Yes
Full Time	No Yes
Owner	No Yes
Part Time	No Yes

Documents

Already Attached

Browse or Drag/Drop documents

Drag & drop files here ...

Browse

Temporarily Uploaded Documents

Review and make any needed changes to your rates/rate structure. Click Save Changes when you are done.

Rates

Rate Structure

Free Form

Coverage Type	Is Offered?	Monthly Premium Amount	Employer Amount	Employer Percent	Employee Amount	Employee Percent	ACA Lowest Cost
Employee Only	No Yes	300.00	Employee Amount	50.00	Employee Amount	50.00	No Yes
Employee Plus Children	No Yes	450.00	Employee Amount	40.00	Employee Amount	60.00	No Yes
Employee Plus One	No Yes	Premium Amount	Employee Amount	Employee Percent	Employee Amount	Employee Percent	No Yes
Employee Plus Spouse	No Yes	400.00	Employee Amount	40.00	Employee Amount	60.00	No Yes
Employee Plus Two	No Yes	Premium Amount	Employee Amount	Employee Percent	Employee Amount	Employee Percent	No Yes
Whole Family	No Yes	500.00	Employee Amount	40.00	Employee Amount	60.00	No Yes

Benefit Plan / Policy: MED1 - 2022 BC/BS 1

Save Changes

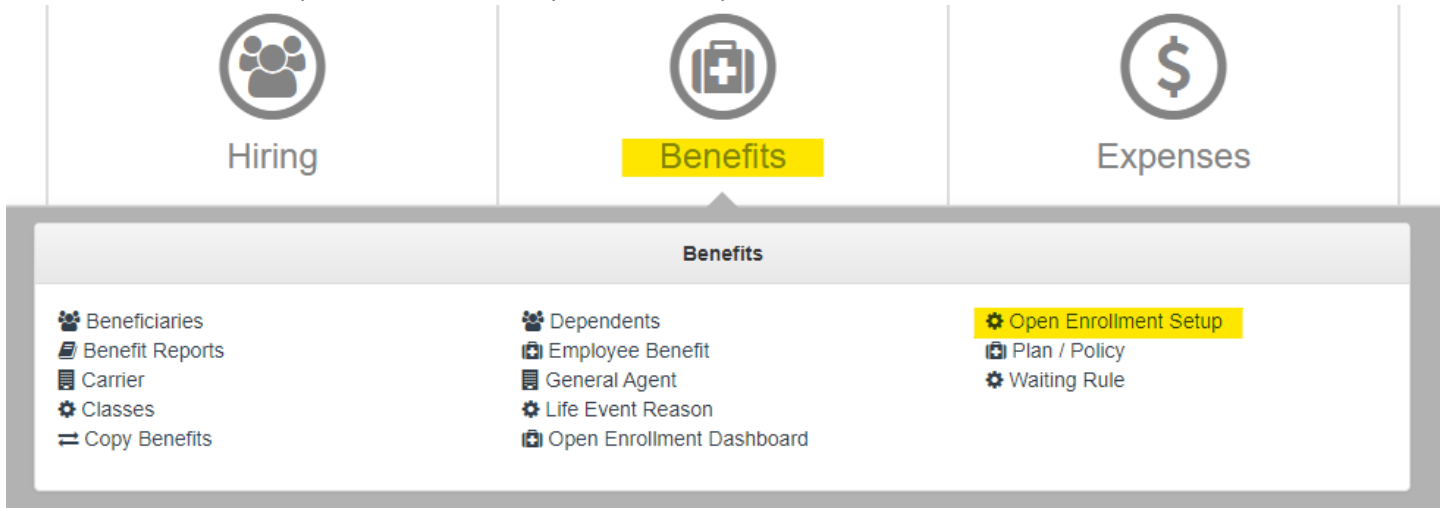
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Close

Complete the steps above for each plan that needs changes for the next benefit plan year.

2.) Add or change your New Plan Year Open Enrollment. Go to Benefits/Open Enrollment Setup/Click on +New to your Annual Open Enrollment or click on the Annual Open Enrollment that you already have setup to open it and change/add the needed information your information for your Annual Open Enrollment.



To add a NEW Annual Open Enrollment, click +NEW

Open Enrollments



Save Changes

Save & Next Record

Close

Open Enrollment: **NEW RECORD**

Company

Company

Ginger's Pet Care (GMPC)

Open Enrollment Info

Name

2023 Annual Open Enrollment

Start Date

10/03/2022

End Date

10/17/2022

Introduction

This introduction will be displayed to employees when they begin open enrollment.

Welcome to your Annual Open Enrollment!

Custom Acknowledgement

This language will be displayed to employees when they review and e-sign open enrollment.

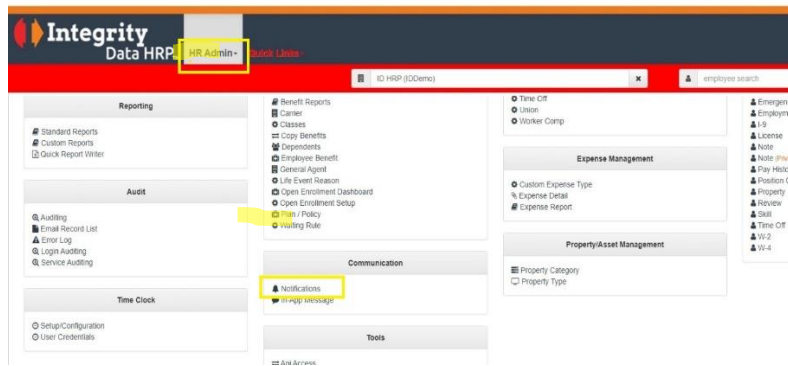
Thank you for completing your 2023 Plan Year Open Enrollment!

3.) Setup your 3 Open Enrollment Notifications:

Open Enrollment Start Date, Open Enrollment End Date and Open Enrollment Complete .

***Your Notification will not be sent unless you mark it as Active Yes.**

***Your notifications must be completed at least 48 hours before you want the Notification to go out.**



Go to Communications/ Notifications

Communication

Notifications

In-App Message

Notifications

Notification System is ON and ready for use

Download

enroll

All Categories - No filter applied

Standard - Standard Events

Actions	Category	Name	Active	Recipients	Delivery	Description
	Classes	Enrollment in Class	No Yes	Target Employee	Delivery when event occurs	Confirmation Email sent to Employee when they successfully enrolled or were enrolled by an Admin/Manager in a class.
	Open Enrollment	Open Enrollment Complete	No Yes	Reports To 1 - Reports To 2 - Reports To 3	Delivery when event occurs	Open Enrollment Complete
	Open Enrollment	Open Enrollment Start Date	No Yes	Employees: Moore, Lorene (1), Lynn, Kelli (220), Matthews, Chris (221), Doe, Jane (222), Gee, Tallula (225), Boy, Danny (226)	Delivery occurs ON the Target Date	Notifies recipients of Open Enrollment start date
	Open Enrollment	Open Enrollment End Date	No Yes		Delivery occurs 2 days BEFORE the Target Date	Notifies recipients of Open Enrollment end date
	Open Enrollment	Special Enrollment Start Date	No Yes	Target Employee	Delivery occurs ON the Target Date	Benefits special enrollment start date notification

1 of 1

Go

Page size: 5

Change

Item 1 to 5 of 5

Open Enrollment Start Date: Active/Include Target Employee Yes/Deliver by Email Yes, App Message is optional/add the number of days before target date or mark On Target Date

Notification: Open Enrollment Start Date

Company Company Ginger's Pet Care (GMPC) Status Active No Yes	Notification Info Category Open Enrollment Trigger Type Date Name Open Enrollment Start Date Description Notifies recipients of Open Enrollment start date
Recipients Include Target Employee No Yes Include Other Groups Employees (check active employees with email addresses) Please Choose (represents BLANK) Users (check all that apply) Please Choose (represents BLANK) Users - HIGH LEVEL (check all that apply) Please Choose (represents BLANK)	Delivery Deliver by E-Mail No Yes Deliver by In-App Message No Yes Interested in delivery by TEXT message? Clicking below will notify us of your interest, and a representative will be in contact to discuss the details and setup. Notify Us HERE Days 0 ✓ Timing On Target Date ✓

Add your subject line and any information that you want sent to your employees in the Body and click on Save Changes.

Form Template
Reset Template back to default

Subject

[COMPANYNAME] - Open Enrollment Start Date Reminder

Body

[COMPANYNAME]

Open Enrollment Name: [OENAME]

Open Enrollment Period: [STARTDATE] - [ENDDATE]

Notification: Open Enrollment Start Date

Save Changes

Save & Next Record

Prev Record

Next Record

Close

Open Enrollment End Date Notification: Follow the same steps as above for your



Recipients

Include Target

Employee

No

Yes

Reports To 1

No

Yes

Reports To 2

No

Yes

Reports To 3

No

Yes

Include Other Groups

Employees (check active employees with email addresses)

Moore, Lorene (1), Lynn, Kelli (220), Doe, Jane (222)

Users (check all that apply)

Please Choose (represents BLANK)

Users - HIGH LEVEL (check all that apply)

Please Choose (represents BLANK)

Add your Subject line and any information you want in the Body and when you are done, click on Save Changes.

Notification: Open Enrollment Complete