NEW COMPANY BASIC SET-UP

NEW COMPANY DATA NEEDED	
Company Information	
Employer Name	
Address	
Phone Number	
Fax Number	
SIC Code	
Tax ID	
Corporation Type	
Contacts Information	
Contact Names	
Type Contact	
Title	
Phone Number	
Email	
Do you have different payroll cycles for your employees	
Class Structure	
Classes (i.e. plans with different waiting periods, eligibility, payroll deductions, classes as defined in your benefit contracts)	
Departments (Departments may be assigned to employees and, optionally, used as benefit eligibility criteria)	
Divisions (Divisions are primarily used for controlling HR access to groups of employees)	
Business Units (Business units are commonly used to define organizational units such as multiple companies operating a single set of benefits)	
Offices (Offices are primarily used for controlling HR access to groups of employees)	
Dynamic Classes (Dynamic classes are a combination of several employee demographic elements into a grouping for easier targeting on enrollment; e.g. Maryland exempt and Maryland non-exempt)	
Geographic Areas (ACA rates may vary across geographic areas. They may also vary between carriers. Setup areas that will be used to control rate tables for various ACA-controlled medical plans)	
Plan /Benefits Information	
Carrier Name	
Policy Number	
Policy Start Date-End Date	
Dependent covered to age	
Plan Rates	
Plan Eligibility	

Contributions	
Carrier Contact # and Website (if desired)	
Plan Details	
Employee Census Information (Employee & Dependent)	
SS#	
Last Name	
First Name	
Middle Name	
Suffix	
Gender	
Relationship	
Date of Birth	
Hire Date	
Class (as defined above)	
ACA Classification-Eligible (Regularly working more than 30 hours)/Ineligible (Regularly working less than 30 hours)/Variable Hour	
Compensation Type (Hourly/Salaried)	
Hourly Rate	
Annual Base Salary	
Address	
City	
State	
Zip	
Benefit Plan Elections	
***From Home Screen click Import Employees & Enrollment and download census template for a listing of other fields you may want to import**	

NEW COMPANY STEPS TO BASIC SET-UP

Step 1) Add A New Company (From Broker Home Page)

Step 2) Settings

- ***Company***
  - Profile
  - Contacts
  - Class Structure
    - Add Classes or leave default
  - Add HR Users
  - HRIS Field Tracking (review and update if needed)
- ***Employee Experience***
  - Company Logo & Branding
  - Contact HR Header
  - General Settings
  - Recommended Web Pages
  - Home Page
  - RSS Feeds
- ***Communications***
  - Home Page Articles
  - Home Page News
  - Email Templates

Step 3) Benefits

- ***Basic***
  - Plan List » Add A Plan
    - Basic
    - Policy Information
    - Eligibility Rules
    - Contributions
    - Restrictions
    - Change Rules
  - Communication
    - Communications
    - Services
    - Preview
    - Questions Disclosure
  - Enrollment
    - Standard
    - Wash Rules
  - Activate
    - Update fields with "X" under Basic, Communications, Enrollment
    - Activate For Enrollment
- **Settings**
  - Enrollment
  - Enrollment Window
  - Employee Profile Fields
  - Dependent Profile Fields
  - Life Events

STEP 4) Documents

- **Add Document**

Step 5) Home

- **Import Employees and Enrollment**
  - Download Template and complete with census data. Save. Import.

Step 6) Wall

- **Feeds**
  - Set-Up Wall Feed to keep track of your tasks for things such as New Hire or Termination procedures

Step 7) Tasks

- **Onboarding Tasks**
  - Getting Started
  - Orientation
  - Company Policies and Procedures
  - Safety and Training
- **Custom Tasks**
  - Add a new task (if needed)

Step 8) ACA

- **Dashboard**
  - Visit the ACA Measurement Periods page (under "Tools" » "Measurement Periods") to get started with the variable hour tracking process for this company.
- **Manage Employees**
- **Manage Hours**

***** For further guidance on Set-Up, go to "GUIDE" tab and click******