

# Everwell Group Set Up Process for Third-Party Integration

Once a producer has become Everwell certified, they will then have the ability to build a group in Everwell. This will allow them to create the Technical Worksheets that a Third-Party will need for the integration setup in their system.

- Before accessing Everwell, the account must be active. If you have not established the Aflac account, please complete Aflac's M0138/NY0138 and call 855-201-0223 to initiate the Account Activation on Demand (AAOD).
  - The paper exception is only for standalone Brokers, if the Broker is working with an Aflac associate or Broker Sales Professional (BSP) the AAOD process must be used to establish the account.
  - Note: If the paper option is chosen, the Broker must email the M0138/NY0138 form to [NAS@aflac.com](mailto:NAS@aflac.com) for Aflac US accounts or [AFLNY-NASATeam@aflac.com](mailto:AFLNY-NASATeam@aflac.com) for NY accounts, Faxed forms will not be accepted. The processing turnaround time will be 48 hours.
- Access Form M0138 [here](#)
- Access form NY0138 [here](#)
- If you have an active Aflac account number and have previously enrolled this account in Everwell, you can proceed to 'Login to Everwell' and 'Create a Plan Year' (See page 7 for instructions)
- If you have an active Aflac account and have never enrolled the account in Everwell. you can proceed to 'Login to Everwell' and begin 'Creating a Group' with Step 1 (see page 2 for instructions)
- If you have an active Aflac account number and have never enrolled the account in Everwell, you can proceed to Login to Everwell and begin Creating a Group with Step 1 (See page 2 for instructions.)

## Login to Everwell

Go to (<https://www.everwellbenefits.com/broker/login>) to log in with your Everwell credentials. To receive credentials, you must be an [Everwell Authorized Producer](#) with Aflac. For more information about this certification, call Aflac at 1-855-411-4427. If you have lost your credentials, click "Forgot User ID or Password?" on the bottom left corner of the Everwell Login page.

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## Creating a Group

**Step 1** – Click on the 'Create Active Group' button on the Everwell Groups Page. A modal window will pop up and you will need to complete each step in order to import your active group into Everwell.

### Create Active Group Step 1 of 5: Import Active Group

Please enter your group number below.

If you do not have a group number please call 1-855-201-0223 to initiate group setup via Account Activation on Demand (AAOD).

Additional AAOD information: [Learn More](#) | [Pre-Call Worksheet](#)

Group Number

Company Code (US or NY)

The Writing Number selected will be used to create the Default Commission Schedule for the Group. This Commission Schedule may be edited at any time following group creation by using the Commissions tab for the specific group.

Writing Number

SIT Code

Cancel

Continue

- Group Number – A group number MUST be created with Aflac prior to creating your group in Everwell.
- Company Code (US or NY) – Select the appropriate code based on the location of the group.
- Writing Number – Select the appropriate writing number for the producer setting up the group.
- SIT Code – Select the appropriate code based on the group.

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**Step 2** – The group’s basic information will be populated on this screen based on the group number entered in the previous step. If any of the information is incorrect or missing, you will have the ability to update it on this screen.

## Create Active Group Step 2 of 5: Complete Basic Info

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SIC Code	Industry Code	Partner Group Number
<input type="text" value="5571020"/>	<input type="text" value="B"/>	<input type="text"/>
Group Name	Group Situs/HQ State	Situs/HQ zip
<input type="text"/>	<input type="text" value="Select State..."/>	<input type="text"/>
Location Address		
Street Address 1	Street Address 2 (optional)	
<input type="text"/>	<input type="text"/>	
City	State	Zip Code
<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>
Phone Number	General Contact Email Address	
<input type="text"/>	<input type="text"/>	

---

Back

Cancel

Continue

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**Step 3** – Set the group’s eligibility rules. These rules **MUST** match how it is set up on the Third-Party system.

- New Hire Waiting Period – Select the amount of days that applies to the group.
- Coverage Start Date – There are three options available for configuring the coverage start date.
  - Immediately (1 day following signature of application)
  - Immediately following \_\_\_\_\_ days of employment
  - First day of month following \_\_\_\_\_ days of employment

## Create Active Group Step 3 of 5: Set Eligibility Rules

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New Hire Waiting Period

Select



Enrollment Period: Employees have 60 days to enroll

Coverage Start Date

- Immediately (1 day following signature of application)
- Immediately following  days of employment
- First day of month following  days of employment
- 

Back

Cancel

Continue

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**Step 4** – Setup the administrators for the group. There are two options for setting up an administrator.

- Create New – For this method you will need to enter the Name, Email Address, and Administrator Role for each administrator you want to add.
- Import – When this radio button is selected, you will be prompted to enter an email address that you can search with. This will allow you to pull in an existing administrator's information that was set up for another group.

## Create Active Group Step 4 of 5: Create Group Administrators

Create New  Import

Name

First Name

Last Name

Email Address

email@address.com

Administrator Role

Select... 

Add

*You have not yet created any Group Administrators.*

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Cancel

Continue

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**Step 5** – Setup the billing information for the group. When you reach this screen the company address will automatically be populated and the 'Use company address for billing address' box will be checked.

- Default Employee Pay Frequency – This field **MUST** be set to the same pay frequency that is configured on the Third-Party Platform.

## Create Active Group Step 5 of 5: Billing Information

Choose Billing Contact

Enter New Information... 

Name

Use company address for billing address

Street Address 1

Street Address 2 (optional)

City

State

Select 

Zip Code

Phone Number

Email Address

Default Employee Pay Frequency

Weekly 

Back

Cancel

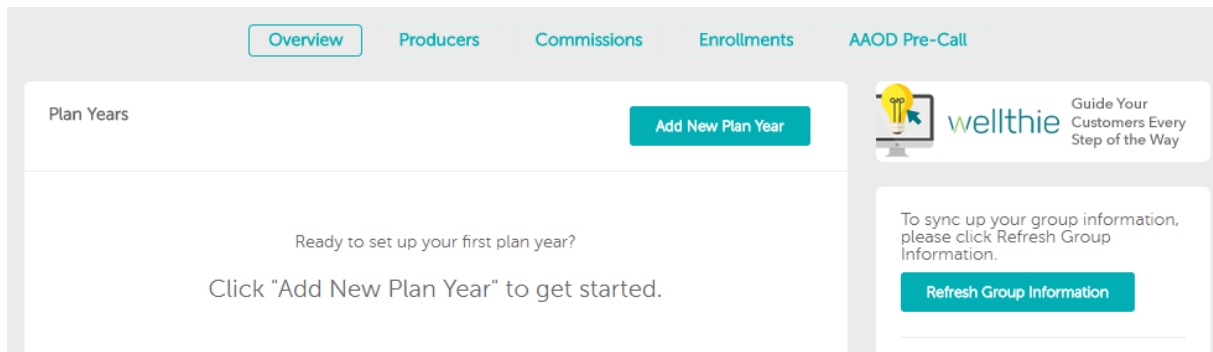
Complete Group Setup

# Everwell Group Set Up Process for Third-Party Integration

## Creating a Plan Year

Once you have imported your group information, you now have the ability to create a plan year for the group. The plan year is defined as the open enrollment period prior to the coverage start date, as well as the plan year's coverage effective start date through the end date. This allows you to do things like selecting to use a Third-Party Integration (i.e. SSO Connection), enter census information and select plan options.

**Step 1** – Click on the Add New Plan Year Button for the group that you just created.



**Step 2** – Enter the group's basic information.

### Create Plan Year

Basic Information Employee Census Plan Choices Plan Pricing Carrier Forms Verify & Submit

This is an Aflac only enrollment

#### Basic Information

Everwell Enrollment  Third-Party Enrollment

Select Third-Party Platform  
Select...

Plan Year Will Consist of Only Aflac Products  
 Cafeteria Plan  
 Call Center Enrollment

Enrollment Dates  
Start Date  End Date

Coverage Dates  
Start Date  End Date

# Everwell Group Set Up Process for Third-Party Integration

- Everwell Enrollment vs Third-Party Enrollment
  - Everwell Enrollment – You should ONLY select this radio button when the enrollment is occurring in Everwell, without a Third-Party integration. Do NOT select this option if you are intending to have an integration to a Third-Party Platform.
  - Third-Party Enrollment – You MUST select this radio button to set up an integration to a Third Party Platform. Once this radio button is selected, a modal window pops up asking if you are sure that you want to configure as a Third-Party Enrollment. After clicking 'I'm Sure', you will be able to select the Third-Party Platform that you want to connect to in a drop down list.
- Cafeteria Plan – Check this box if the group has a cafeteria plan.
- Enrollment Dates – Enter the enrollment Start and End Dates.
- Coverage Dates – Enter the plan year coverage effective Start and End Dates.

**Step 3** – Enter employee census information for the group.

**Please Note:** The preferred method is to have the employees loaded to the Third-Party Platform and then sent to Everwell in the Census Upload Web Service. So of the three options for adding a census below, you should only use the Census Summary when setting up an SSO connection to a Third-Party Platform.

Edit Plan Year

Basic Information Employee Census Plan Choices Plan Pricing Carrier Forms Verify & Submit

This is an Aflac only enrollment

Employee Census

Select Type of Census Input

Census File Upload  Manual Input  Census Summary

Total # of Employees

Go Back Continue

- Census File Upload – You should **NOT** select this radio button when setting up an integration to a Third-Party Platform.
- Manual Input – You should **NOT** select this radio button when setting up an integration to a Third-Party Platform.
- Census Summary – Select this radio button when setting up an SSO connection with a Third-Party Platform. Enter the estimated number of employees in the Total # of Employees field.



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**Step 4** – Select the group’s plan choices.

**Please Note:** You **MUST** select a minimum of two Aflac plans in order to set up a plan year for a group in Everwell.

**Edit Plan Year**

Basic Information Employee Census **Plan Choices** Plan Pricing Carrier Forms Verify & Submit

This is an Aflac only enrollment

**Plan Choices**  
Select Product Mix  
Insurance policies available to this Group are listed below. Please select all the products you wish to offer. Then click Continue.

Accident  
Offered by:  
Aflac  
  
Select this Product

CI  
Offered by:  
Aflac  
  
Select this Product

Hospital  
Offered by:  
Aflac  
  
Select this Product

STD  
Offered by:  
Aflac  
  
Select this Product

**Step 5** – In this step, Everwell imports the plan pricing for the products you have just selected. There is no action to take in this step as the pricing will display during the enrollment experience. Select 'Continue' to advance.

**Edit Plan Year**

Basic Information Employee Census Plan Choices **Plan Pricing** Carrier Forms Verify & Submit

This is an Aflac only enrollment

**Pricing Overview** Show all plans

View Pricing and Edit Employer Contribution for applicable plans

**Accident Plans**  
6 Aflac Accident Plans

**Critical Illness Plans**  
5 Aflac Critical Illness Plans

Go Back Continue

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**Step 6** – In this step, you will need to select the 'Start Form' button and continue through the steps that are presented in the modal window. There are no other action items to take on this page as the forms will be displayed during the enrollment experience. Once you see the green checkmarks, select 'Continue' to advance.

**Edit Plan Year**

Basic Information | Employee Census | Plan Choices | Plan Pricing | **Carrier Forms** | Verify & Submit

This is an Aflac only enrollment

### Carrier Forms

To complete the setup for this group, please verify all the information provided for each of the carriers listed below.

**Aflac.** | 1 Form Completed TBD | 2 Group Approval TBD | 3 Submitted to Carrier TBD | 4 Carrier Approval TBD | **Start Form**

[Go Back](#) [Continue](#)

**Step 7** – On this screen you have the ability to review all of the information you have entered in the previous steps. Once you confirm that the information is correct, select the 'Verify And Submit' button to complete the Plan Year setup.

**Edit Plan Year**

Basic Information | Employee Census | Plan Choices | Plan Pricing | Carrier Forms | **Verify & Submit**

This is an Aflac only enrollment

### Verify & Submit To Group Admin

Review your selections below to ensure your group is properly setup before continuing.

**General | Edit** ✔ Complete

200 Employees  
Plan Year Name: 2018-2019 Plan Year  
Coverage Dates: 2018-05-01 to 2019-04-30  
Enrollment Dates: 2018-04-04 to 2018-04-30

**Plan Choices | Edit** ✔ Complete

Accident Plans (6) ▾  
Critical Illness Plans (5) ▾

**Plan Pricing | Edit** ✔ Complete

All plans priced

**Carrier Forms | Edit** ✔ Complete

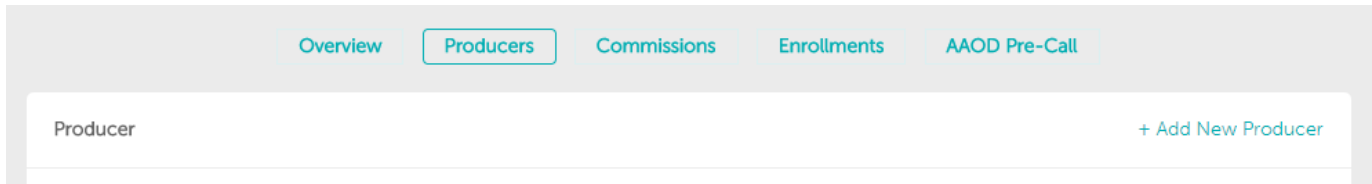
Aflac: Form Complete

[Go Back](#) [Cancel](#) [Verify And Submit](#)

# Everwell Group Set Up Process for Third-Party Integration

## Adding Producers

Once the Plan Year has been created, you can now add any additional producers by going to the Producers tab and clicking the '+ Add New Producer' icon. Then follow the steps to add each producer.



**Step 1** – Find the producer you would like to add by searching for them either by using their Last Name or their 5 digit Writing #.

## Assign New Producer Step 1 of 3 - Find Producer

Search for producer by last name using the field below, then select producer from the results.

---

OH - Ohio  Show All Products

Enter last name   Enter 5 digit Writing #

**Step 2** – Assign the commission split for the newly added producer. There will be four drop down menus that you will need to fill out in order to continue.

- Producer – Select the producer you are assigning a commission split to.
- Percentage – Select the percentage amount of the commission split.
- Writing Number – Select the appropriate Writing # for the producer.
- SIT Code – Select the appropriate SIT Code for the producer.

**Step 3** – Send an invitation to the newly added producer. You will be presented with two radio buttons on this screen and you **MUST** choose one of them before sending the invitation.

- Enroller – By selecting this radio button, the producer you just added will **ONLY** be able to assist with enrollments. They will **NOT** have access to make any changes to the group's Plan Year configuration.
- Assisting Producer – By selecting this radio button, the producer you just added will be able to assist with enrollment **AND** will have the ability to make changes to the group's Plan Year configuration.
  - Once the invitation has been sent, the newly added producer **MUST** accept the invitation in order for the SSO connection to work from the Third Party Platform.

# Everwell Group Set Up Process for Third-Party Integration

## Technical Worksheets

Download the Technical Worksheets and provide to the Third-Party case builder so they can complete the group build on Third-Party platform. This step can only be completed once the plan year has been created and locked (the icon next to the Plan Year will appear as locked and greyed out).

The screenshot displays the Everwell Group Set Up interface. At the top, there are navigation tabs: Overview (selected), Producers, Commissions, Enrollments, and AAOD Pre-Call. The main content area is divided into three sections: Plan Years, Proposals, and Notes. The Plan Years section shows a single entry for the 2018-2019 Plan Year, which is locked (indicated by a padlock icon) and has a 'Delete' button. The Proposals section is empty and includes a '+ Add New Proposal' button and a message: 'To set up a proposal and get rate quotes, click "Add New Proposal."'. The Notes section has a search bar, a dropdown menu for 'Show 10 Most Recent Activities', and an 'Add Note' button. On the right side, there is a sidebar with the Wellthie logo and a 'Refresh Group Information' button. Below that, there is a section titled 'Group Type: Third-Party Enrollment Making Plan Year Changes?' with instructions on how to handle plan year changes. At the bottom of this sidebar, there is a 'Download Technical Worksheet' button, which is highlighted with a red box. Below this button are links for 'PDF Worksheet' and 'XML Worksheet'. The sidebar also shows 'Plan Year Expires: 04/30/2019'.

- There are two documents that need to be downloaded and saved. They are located in the screenshot above with the red box around them.
  - PDF Worksheet
  - XML Worksheet

# Everwell Group Set Up Process for Third-Party Integration

## Importing Existing Coverage & Establishing Express Services File

Once the group has been set up, the plan year created, and the Technical Worksheets have been generated you can submit a request to have the existing coverage provided. The request must be submitted 5 days prior to enrollment. You can submit the email request at [expressservices@aflac.com](mailto:expressservices@aflac.com) along with your request to establish the ongoing Express Services files.

The information below needs to be included in your email request.

- Group Name
- Aflac Account Number
- Third-Party Provider Name
- File Start Date – This is the date that you are requesting the file for existing coverage.
- Change File Frequency - Groups typically align this with the pay frequency or billing cycle. If the file is requested for a specific day please indicate that with your frequency (ex: biweekly on Fridays)

For groups that are already enrolled in Aflac Individual products, they can perform a sync with Aflac's billing system to obtain existing coverage after the request has been completed.

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