Employee Navigator Implementation

What your Broker needs from you to get things started!
1. Class structure – How are your employees organized? ○ Do benefits, eligibility or contributions vary by classes? ○ Do you need reports based on employee class? ☐ **Provide class structure information to your agent**
2. Payroll Calendars ○ Do all employees get paid on the same days? If not, please provide calendar for each pay frequency ☐ **Provide payroll calendar(s) to your agent**
3. Benefits **A. Eligibility** • Based on class structure? Y/N? If yes, provide details • What are eligibility and termination rules for New Hires (FOM, DOH, waiting periods) ▯ Are newly eligible employees following the same eligibility rules as a New Hire? **B. What is the employer contribution structure?** **C. Do you utilize Defined Contributions?** **D. Will we be importing existing enrollments into the system?** If so, we will need a complete enrollment census! ☐ **Provide Benefits information to your agent**
4. Company Enrollment Settings **A. When is the new hire enrollment window open?** **B. Will employees use the system to process qualified life event changes?** ☐ **Provide Enrollment settings information to your agent**
5. Employee Census **A. Required information for all employees:** • SSN, First and Last Name, DOB, DOH, Class **B. Additional Employee Information** • Address (are there ACA rated plans based on where the employee lives?) ▯ Email (would you like to be able to send system-generated emails? • Salary (are there salary based benefits available to employees? • Additional Class structure fields (does the company have divisions, departments?) ▯ Payroll groups **C. Optional Dependent Information** • Do you have Dependent information available? • If we are importing existing enrollments, we will definitely need this! ☐ **Provide a complete demographic census to your agent**