## **EaseConnect+ Overview**

To request an EaseConnect+ connection, click **ToDos > Connections > Readiness**. EaseConnect+ feeds are included in your subscription.

CONNECTION	DESCRIPTION	TRANSMIT FREQUENCY	SUPPORTED PLANS	WHEN TO CONNECT	NOTES
Ameritas Ame	Submit enrollments manually during setup. All plans, rates, eligibility, and documents are maintained in Ease. Setup is supported by the EaseConnect+team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Mondays	All products also include voluntary options.  • Dental (Dental Select not supported)  • Vision (Hearing & Lasik can be added on)	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: Ease can submit new business enrollments to Ameritas when the following process is followed: Request your new business connection at least 30 days before the plan effective date and make sure to tell your CSM it is new business. Ease will request the connection documents from Ameritas by submitting a census, and Ease will submit a test file to Ameritas when OE closes. Initial enrollment will send on the first production file when the group is in an approved status.	Policy Numbers: Beginning of the policy number field will be: 010 or 026 for ALIC & ALIC NY (Ameritas direct)  160 and 161 for Standard and Standard of NY (Ameritas via The Standard).  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Ameritas will process changes on the file from Ease or provide errors to Ease in 24-48 business hours.
<b>beam</b> ®	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Nightly EDI Feed	<ul> <li>Dental</li> <li>Vision</li> <li>Accident</li> <li>Critical Illness</li> <li>Hospital Indemnity</li> <li>Life and AD&amp;D</li> <li>Voluntary Life and AD&amp;D</li> </ul>	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 15 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: Ease can submit new business enrollments to Beam when the following process is followed: Add your group to the Group Build Queue in Ease at least 15 days prior to the effective date to ensure enrollments can be communicated via the EDI feed timely. Ease's case build team will alert you via your request to start OE. Ease will submit a test file to Beam when OE closes. Initial enrollment will send on the first production file when the group is in an approved status.	Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Beam will process changes on the file from Ease or provide errors to Ease within 24 business hours.
<b>S</b> Guardian	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once approved, all adds, changes, and terminations are supported through the connection.	Nightly API Feed	Dental Vision Life Voluntary Life Voluntary Life Long Term Disability Short Term Disability Critical Illness Voluntary Critical Illness Accident Cancer Hospital Indemnity	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 15 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: Ease can submit new business enrollments to Guardian when the following process is followed: Add your group to the Group Build Queue in Ease at least 15 days prior to the effective date to ensure enrollments can be communicated via the API feed timely. Ease's case build team will alert you via your request to start OE. Ease will submit a test file to Guardian when OE closes. Initial enrollment will send on the first production file when the group is in an approved status.	Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Guardian will process transactions on the feed from Ease or provide errors to Ease within 24-48 business hours.



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Humana.	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Nightly API feed	Medical     Dental     Vision	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: New business initial enrollment is not currently supported via the Humana Ease connection. You may connect as existing business after your plan effective date. You may request your connection ahead of this date, but it will pend until after the effective date.	<ul> <li>Small Group only.</li> <li>Medical: Community-rated plans (2–50 employees in most states; 2100 in Colorado; not supported in Utah); changes not supported with gated HMO plans.</li> <li>Dental: Groups with 2–100 employees; DHMO not supported</li> <li>Vision: Groups with 2–100 employees</li> <li>Basic Life: Groups 2–100; Flat amounts</li> <li>Large group, level-funded, and self-funded are not supported.</li> <li>OE files are sent as a File, all changes will go through daily API.</li> <li>Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.</li> <li>Carrier SLA: Any timely transactions via API connection should be viewable within Humana enrollment systems within 24-72 hours. Any timely transactions via EDI connection* should be viewable within Humana enrollment systems with 24-72 hours of the file being received at Humana. Any transactions that are not timely will require manual review and could take 7-10 business days for review within Humana enrollment systems.</li> <li>*EDI connections Clarification: Changes on EDI groups are not updated at Humana immediately after they are entered in Ease. There is an additional delay on EDI groups because files feed to Humana on Mondays and Thursdays rather than nightly on API.</li> </ul>
Financial Group®	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Mondays	<ul> <li>Dental</li> <li>Vision</li> <li>Life and AD&amp;D</li> <li>Voluntary Life and AD&amp;D</li> <li>Long Term Disability</li> <li>Short Term Disability</li> </ul>	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: New business initial enrollment is not currently supported via the Lincoln Financial Group Ease connection. You may connect as existing business after your plan effective date. You may request your connection ahead of this date, but it will pend until after the effective date.	Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Lincoln Financial Group will process error-free changes on the file from Ease within 24 hours. Transactions with errors will be provided to Ease within 3-5 business days.
MetLife  RESOURCE	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Wednesdays	<ul> <li>Dental</li> <li>Vision</li> <li>Accident</li> <li>Critical Illness</li> <li>Hospital Indemnity</li> <li>Life and AD&amp;D</li> <li>Voluntary Life and AD&amp;D</li> <li>Long Term Disability</li> <li>Short Term Disability</li> </ul>	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Make sure to tell MetLife you are planning to connect during the renewal paperwork process. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  To request an existing business connection, use ToDos > Connections > Readiness to have the group administrator complete the Service Fee Agreement form within the Ease app.  New Business Connection Requests: During the quoting process, let your MetLife Account Executive know that you will be using Ease for enrollment. This will ensure all underwriting requirements are handled up front. Request your connection via ToDos > Connections > Readiness. New business initial enrollment via the feed is not currently supported via the MetLife Ease connection. Submit enrollment manually, and you may connect as existing business after your plan effective date.	Group must be underwritten to accommodate technology. Please work with your MetLife Account Executive to ensure groups are qualified for connection.  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Once MetLife receives the Ease file feed it is loaded into MetLife's eligibility system within 24 hours. The eligibility system is separate from MetLink, and the Ease file does not feed directly into MetLink.  • Transactions with errors are provided to Ease within 1-3 business days  • Error-free records are loaded into downstream systems for billing or claim handling 1-3 business days after the file has processed in MetLife's eligibility system  • MetLink  • After transactions are processed in the eligibility system they are visible in MetLink as follows;  • For groups under 100 lives, MetLink is updated within 5-7 business days  Note: Dependent records are displayed as total count and not individual records. Don't be alarmed by this, it does not mean that MetLife's eligibility system does not have all of the dependents. A good rule of thumb is to confirm that the total count is correct and matches the rate tier that your client has selected.  • For groups over 100 lives, MetLink is updated within 24 business hours.



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Mutual Omaha  RESOURCE	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Fridays	<ul> <li>Dental</li> <li>Vision</li> <li>Accident</li> <li>Critical Illness</li> <li>These products also include voluntary options:</li> <li>Life and AD&amp;D</li> <li>Long Term Disability</li> <li>Short Term Disability</li> </ul>	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: New business initial enrollment is not currently supported via the Mutual of Omaha Ease connection. You may connect as existing business after your plan effective date. You may request your connection ahead of this date, but it will pend until after the effective date.	Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Mutual of Omaha has two file processing systems. A legacy system and a new system called BAM.* Mutual of Omaha plans to have all groups migrated to the new system by the end of 2024.  For groups on BAM, Mutual of Omaha will process error-free changes on the file from Ease within 24 hours. Transactions with errors will be provided to Ease within 1-3 business days.  For groups on the legacy system, Mutual of Omaha will process error-free changes on the file from Ease within 24 hours. Transactions with errors will be provided to Ease within 3-5 business days.  *If you would like to know which system your group is on, please contact Mutual of Omaha at Omaha.Service@mutualofomaha.com.
Principal	Submit enrollments manually with benefits, rates, and eligibility maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Nightly API Feed	<ul> <li>Dental</li> <li>Vision</li> <li>Life and AD&amp;D</li> <li>Voluntary Life and AD&amp;D</li> <li>Long Term Disability</li> <li>Short Term Disability</li> <li>Critical Illness</li> <li>Accident</li> </ul>	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 15 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: New business initial enrollment is not currently supported via the Principal Ease connection. You may connect as existing business after your plan effective date. You may request your connection ahead of this date, but it will pend until after the effective date.	Changes need to happen in Ease for them to be reflected in the daily API update.  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Principal will process error-free changes on the file from Ease within 24 hours. Transactions with errors will be provided to Ease within 3-5 business days.
reliance matrix	New and existing business. Must be approved by RSLI. RSLI connection is for self- billed products, simplifying the experience by not having to truly manage eligibility. Ease is the system of record. Dental and vision are supported through the Ameritas connection, though the products are labeled RSLI Dental and Vision.	All lines are self- billed and do not feed enrollment aside from dental and vision. Dental and vision will follow the Ameritas file schedule.	Basic Life and AD&D Short Term Disability Long Term Disability Accident Critical Illness Voluntary Hospital Indemnity Dental Vision	Anytime	<sup>1</sup> Effective dates after 5/1/2021 only. Not in states CT, ID, NY, OR, and WA) — Effective dates older than 5/1/2021 are on a legacy platform that is not supported.  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.
The Standard of RESOURCE	New business only; all requests must be first communicated with The Standard sales reps. The Standard will control who can connect and when they can connect. After the broker lets The Standard know they are going to connect, The Standard will provide the structure to Ease via task. Residential build - business as usual during set up. All plans, rates, eligibility, and documents are maintained in Ease.	Weekly on Mondays	<ul> <li>Dental<sup>2</sup></li> <li>Vision<sup>2</sup></li> <li>Life and AD&amp;D</li> <li>Short Term Disability</li> <li>Long Term Disability</li> <li>Accident</li> <li>Critical Illness</li> <li>Hospital Indemnity</li> </ul>	Existing Business Connection Requests: This connection currently supports new business only.  A transition plan for existing business will be communicated when available.  New Business Connection Requests: Brokers need to notify The Standard they will be using the Ease connection during the sold case process and roughly 45 days prior to the effective date in order to produce the account structure in time for submission. The Standard will notify Ease when groups are ready to begin the connection process.	<sup>2</sup> Dental/vision coverage is handled through The Standard (Ameritas).  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner.  Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: The Standard will process changes on the file from Ease or provide errors to Ease within 3-5 business days.



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Sun Life  RESOURCE	Submit enrollments manually during set up. All plans, rates, eligibility, and documents are maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Thursdays	All products also include voluntary options.  • Dental³  • Vision  • Life and AD&D  • Short Term Disability  • Long Term Disability  • Accident  • Cancer (Composite Rated)⁴  • Critical Illness (Attained Age)⁴	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: New business initial enrollment is not currently supported via the Sun Life Ease connection. You may connect as existing business after your plan effective date. You may request your connection ahead of this date, but it will pend until after the effective date.	Clients with policies starting with a 9 (like 924782 and 919209) are current clients on SunLife's COMPASS platform and should mostly be eligible for files. There are some older 9XXXXX policies that are still on OASIS though that would not be eligible, however they would be rare.  **Not Supported:**  Clients on the OASIS platform (policy numbers starting with a 2)  Assurant contracts on the COMPASS platform (policy numbers starting with a 5)  STD & LTD Buy Up (in progress to offer in the future)  ASO/Self-Funded Dental  Policy numbers starting with a K are linked to ASO Self Funded dental and are not supported  Policy "stacking" (i.e. issue age) is not supported. Brokers should be offering "attained age" plans and should work with their carrier sales rep or EBR contact at Sunlife. They can tell if their plan has this by looking at their sold case proposal/rating structure  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  **Carrier SLA:* Transactions without errors process immediately. Transactions with errors are provided to Ease within 2-3 business days.
United <b>Concordia</b> dental		Weekly on Tuesdays	• Dental • Vision	Type of integration: File-based - Partner Portal  Data Communicated: Ease > UCD: Election and demographic data.  • The data received by the carrier is based on what fields they select under "Custom Reporting."	Carrier Support Contact: Maggie Byerly Maggie.Byerly@ucci.com
<b>Unum</b>	Submit enrollments manually during set up. All plans, rates, eligibility, and documents are maintained in Ease.  Setup is supported by the EaseConnect+ team. Once set up, a test file is sent to the carrier. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Fridays	All products listed below also include voluntary options.  • Dental  • Vision  • Life and AD&D  • Short Term Disability  • Long Term Disability  • Paid Family Leave  • Hospital Indemnity  • Accident  • Critical Illness	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: Ease can submit new business initial enrollments to Unum Group when the following process is followed: Complete sold case paperwork and submit to your Unum Group sales representative at least 25 days prior to the open enrollment start date to bypass the forms process, use the EOI API for initial elections, and send initial enrollment via this feed. If you cannot do this, submit enrollment manually and begin an existing business connection after your effective date.  Unum Group will alert Ease when new business groups are ready for set up, and Ease will begin your connection process. A test file will be sent on your open enrollment end date in Ease, and initial enrollment will be processed via the first production file. You will receive an automated email from Ease when your connection is live. Please do not assume data is feeding before receiving this message.	Worksite VB products are supported by the Unum Group WVB EaseConnect connection (Group Accident, Group Critical Illness, Individual Short Term Disability, Group Hospital Indemnity, Whole Life).  Unum Worksite VB products are also handled, but through a separate connection (EaseConnect direct connect model).  Note: Policy numbers starting with an R0 are not supported under Unum Group as they are for worksite products. Unum Group has a 10 enrolled employee minimum requirement for a connection.  EOI is handled through this connection via a single sign on experience to Unum Group's EOI app. 90% of applicants will know immediately if they are approved. Pending decisions will automatically be returned to Ease and updated to the member's profile.  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Unum Group will process changes on the file from Ease within 3-5 business days.



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vsp. vision care	Submit enrollments manually during set up. All plans, rates, eligibility, and documents are controlled by Ease.  Setup is supported by the EaseConnect+ team. Once approved, all adds, changes, and terminations are supported through the connection.	Weekly on Thursdays	• Vision	Existing Business Connection Requests: Existing business can be connected at any time; however, the connection must be fully live before OE begins or the case will pend until after the renewal date. Submit cases at least 30 days prior to OE start date. Once the connection is in an approved status, all open enrollment changes will flow through the connection for improved accuracy and expedited processing. If the connection is not approved in time for OE, it is the broker's responsibility to submit enrollments to the carrier manually.  New Business Connection Requests: New business initial enrollment is not currently supported via the VSP Ease connection. You may connect as existing business after your plan effective date. You may request your connection ahead of this date, but it will pend until after the effective date	We cannot accommodate a client that is part of another VSP relationship – such as if they are part of an Association, or are contracted with VSP under one of our Alliance partners (Guardian, Principle, MetLife, etc.) where these clients should be sent by the Alliance partners relationship.  VSP will leave access as-is where changes can be made knowing that if Ease's enrollment system does not reflect the same changes, their VSP online updates will be overridden by the next EDI file. Eligibility access can be changed while billing access can remain intact.  Make all adds, terminations, and changes within the Ease system; these will feed directly to the carrier partner. Please avoid making changes in the carrier portal as these will cause discrepancies between Ease and the partner.  Carrier SLA: Transactions without errors process immediately. Transactions with errors are provided to Ease within 2-3 business days.

Create a support ticket at <u>help.ease.com</u> if a group's connection needs to be removed.

