

READY TO MAKE YOUR  
ENROLLMENT EXPERIENCE EVEN SMOOTHER?

## Let's connect on Ease!

It takes a few simple steps...

- ▶ Connect with us in the Marketplace
- ▶ Go through the Setup Wizard for each group you want to connect to E.D.I.S.
- ▶ Input Group Code, Admin Plan Name and EIN
- ▶ We'll review your setup and put you in active status

Now when you add, term or make changes to your group's enrollment in Ease, we will receive the enrollment information automatically and process all of your changes on our end!

Here's a sample of  
additional guidance you  
will receive from our  
underwriting team:

# E.D.I.S.

EMPLOYER DRIVEN INSURANCE SERVICES

**CUSTOMER SERVICE INFO.**

Mon.-Fri. | 8a-5p

888-886-7973

www.employerdriven.com

**E.D.I.S.**  
EMPLOYER DRIVEN INSURANCE SERVICES

SAMPLE BROKER NAME

### TAKE ACTION: Set Up Your EDIS Group in Ease

To properly process your group's adds, terms and changes, we will need you to set up the group code, EIN and plan admin names precisely as listed below in the Ease system. If you have any questions, please feel free to contact us at: [underwriting@employerdriven.com](mailto:underwriting@employerdriven.com) or 888-886-7973.

- 1 Enter Your Group's Client Id in the Setup Wizard**
- 2 Enter Your Group's Federal Tax ID (EIN) under: Company > Profile > Details**
- 3 Plan Admin Names**  

Plan Description	Plan Name
HRA Blue Shield 4500	HRA Plan 1
HRA Aetna 10000 Ded	HRA Plan 2
Freedom Dental 1500	Dental Plan 1
Western Dental HMO	Dental Plan 2
Group Term Life	Life Plan 1
EDIS Self Funded Vision	Vision Plan 1

# Need some help navigating the setup? Here's a closer look!

## CONNECT WITH E.D.I.S.

- Once you're logged into your Ease Account, go to account menu (top right of screen) and click on "My Agency" in the drop down menu.
- Click on the "Marketplace" tab.
- Find the E.D.I.S. tile, click and enable, confirm "Yes Enable." The E.D.I.S. tile will now be highlighted in green.
- Go back to the E.D.I.S. tile and click "Get Started."

## CONNECT YOUR GROUPS WITH E.D.I.S.

- You will now be directed through the E.D.I.S. TPA Setup Wizard. *(You can also enter the setup wizard by selecting the "Companies" tab and selecting the group you'd like to connect to E.D.I.S. Under the Connected Partners section, select the "Manage" button next to EDIS.)*
- Specify your group's Client ID (provided by E.D.I.S. Please see your EDIS NEW GROUP EASE ENROLLMENT sheet.)
- Under the section "Manage COBRA Files," Add "General Initial Notice (GIN)," and "Qualifying Event (QE)."
- Under the section "Manage Flex Files," add "Annual Open Enrollment (ENR)" and "Ongoing Eligibility (ELI)"
- Now, scroll to the plans section below.
- For COBRA Plans, get each E.D.I.S.-administered plan marked with the green connected status by selecting:
  - Edit
  - Under COBRA Eligible, select the appropriate COBRA percentage for the plan.
  - Under connection status, select "Connected."
  - If "Connected" is not an option, you will have to go back to the benefits tab, select the plan and select the appropriate COBRA percentage for the plan under the "Advanced Settings" section.
  - Once you've selected "Connected," you should now see a green bar under the connection status of the E.D.I.S.-administered plan.
- For Flex Plans:
  - Edit
  - Under connection status, select connected.
  - Once you've selected "Connected," you should now see a green bar under the connection status of the E.D.I.S.-administered plan.

## ADDITIONAL INFO. ABOUT SETTING UP YOUR GROUPS TO PARTNER WITH E.D.I.S. IN EASE.

### EIN -

- For reporting accuracy, we ask that you enter an accurate EIN for each of your connected groups.
  - Go to "Companies" tab
  - Select the E.D.I.S.-connected group
  - Under the Profile Tab, select details and enter the group's EIN.

### Creating a New Plan From the E.D.I.S. Library

- When creating plans for your new groups or renewals, we ask that you start building the plan in Ease using one of the E.D.I.S. Plan Templates. This will ensure that we receive all necessary data to enroll the members in our system.
- ADMIN NAME - Please be sure to enter the Admin Name for each E.D.I.S.-administered plan as described in your E.D.I.S. NEW GROUP EASE ENROLLMENT sheet.
- If you are enrolling a group on our EDHP Buy Up Plan with an HRA, please be sure to bundle the plans.
  - Select the HRA / MERP Plan
  - Click Eligibility Tab
  - Under Employee Eligibility section:
    - Contingency Type: Enrolled Bundle
    - Contingency Plans: Select the EDHP Plan you have created for the group.
  - This will automatically enroll your EDHP members in your wrapped HRA and save members time when enrolling.

