

Connecting Ease to Beam

Your path to a powerful connection.

Starting your NEW business Beam connection in Ease:

Add your new Beam group to the **Group Build Queue**.* 2

Ease builds your plans and alerts you via the **Group Build Request** to start open enrollment (OE).

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Start OE in the Ease system. That's it! 4

When OE closes, the connection will be tested, which takes about two business days.

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Ease moves your group to the **Approved** status in Ease.

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Initial enrollment automatically sends after your group is in an **Approved** status. - 7

Ongoing enrollments (new hires, QLEs, terminations) automatically send daily. *If you don't use the **Group Build Queue**, you must tell your

you must tell your Ease CSM this is a new business connection or Ease will treat it as existing business, and it will pend until after the effective date.

Starting your **EXISTING** Beam group connection in Ease:

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Add your existing Beam group to the **Group Build Queue**.

That's it!

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Ease builds your plans. Watch your **Group Build Request** and **Tasks** in Ease to see if any additional actions are needed.

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The connection will be tested, which takes about two business days.

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Ease moves your group to **Approved** status in Ease.



Ongoing enrollments (new hires, QLEs, terminations) automatically send daily. **PRO TIP:** Doing your first group build request? Simply navigate to **To-Dos** > **Group Builds** > **Actions** > **Add Group**. **Get more details**.

Already built your group's plans in Ease? No problem.

To submit your existing business connection request, use the **Ease Readiness Tool**, and go to **ToDos > Connections > Readiness**. Make sure to watch for **Tasks** as Ease audits your plans and membership during setup.

- Existing business can be connected at any time, but the connection must be fully live before OE begins or it won't be connected until after the renewal date.
- Submit existing business connection requests to the Group Build Queue or Ease Readiness Tool at least 15 days prior to the OE start date to guarantee your group will be connected in time for OE.
- If the connection isn't approved in Ease in time for OE, it's your responsibility to submit enrollments to Beam directly at <u>adminsupport@</u> beambenefits.com.
- If you're uncertain if you will have your group connected in time for OE, contact your Ease CSM.

PRO TIP: To view the status of a new or existing business connection, navigate to **ToDos > Connections > Status**. Don't see your group's status? Contact your Ease CSM.

Not sure who your Ease CSM is? Navigate to **Profile** > **Overview** where you'll find your CSM name and email address.

Ease + Beam

Ease will build your plans for free if you use the **Group Build** feature, saving you time and increasing your efficiency!

- Direct electronic data interchange (EDI) connection sends enrollments from Ease to Beam daily.
- Application programming interface (API)
 connectivity exchanges group structure and
 census data to make connection setup faster
 and easier than ever!
- Initial and ongoing enrollments can be sent through the connection.



Questions?

Submit a support request at help.ease.com.

