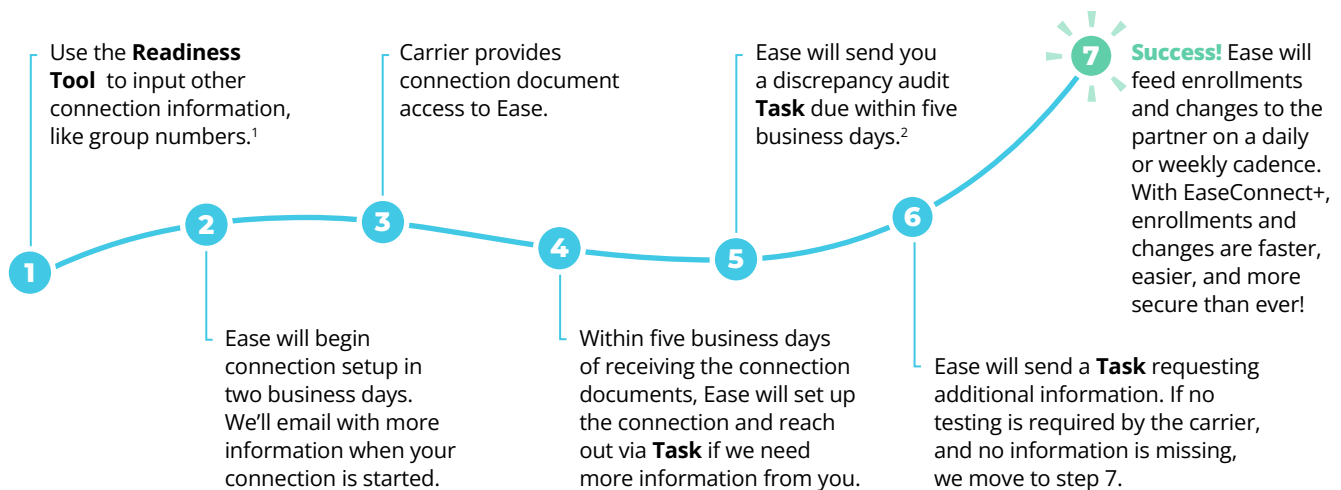# ease

Ready, Set, EaseConnect!

Streamline your new and existing groups' enrollments with EaseConnect+.

Connecting new business with EaseConnect+

When connecting new business via EaseConnect+, some partners can accept initial enrollment via the Ease connection while other partners don't have this ability yet. Please make sure to visit the Help Center to find carrier-specific information by searching for each partner's article.

Connecting existing business with EaseConnect+

To view the status of your connection at any time, navigate to **ToDos > Connections > Status** within Ease. For existing business, the **Readiness Tool** easily identifies connection-eligible groups and helps you populate the needed information. This will eliminate delays in the setup process.

1 Use the **Readiness Tool** to input other connection information, like group numbers.[1]

2 Ease will begin connection setup in two business days. We'll email with more information when your connection is started.

3 Carrier provides connection document access to Ease.

4 Within five business days of receiving the connection documents, Ease will set up the connection and reach out via **Task** if we need more information from you.

5 Ease will send you a discrepancy audit **Task** due within five business days.[2]

6 Ease will send a **Task** requesting additional information. If no testing is required by the carrier, and no information is missing, we move to step 7.

7 **Success!** Ease will feed enrollments and changes to the partner on a daily or weekly cadence. With EaseConnect+, enrollments and changes are faster, easier, and more secure than ever!

1 Some partnerships may require authorization forms.
2 If no notes are added and the discrepancy task is not completed, we now stop the connections process due to lack of response.

EaseConnect+ Readiness Tool

Log in to your Ease portal, then navigate to **ToDos > Connections > Readiness**.

Managing Your EaseConnect+ Connections

Adds, terms & changes

Every EaseConnect+ feeds data one way, from Ease to the carrier. All changes must be made in Ease. If the carrier system is updated instead of Ease, this will cause discrepancies and billing issues. All changes are sent to the partner on a daily or weekly basis.

Connection tasks

If Ease needs your assistance with a connection at any time, we will use **Tasks** to contact you. Make sure you are navigating to **ToDos** > **Tasks** often to ensure a smooth connection. Read more for instructions on Task Management and Discrepancy Audits.

Connection activity

Follow **ToDos** > **Connection** > **Activity** in Ease to see exactly what was sent to a partner on both a company and an employee level. This view serves as an audit trail, too, to stay informed about what was sent to a partner and when. **VIEW VIDEO:** How to manage your connections activity.

Connection status

Follow **ToDos** > **Connection** > **Status** in Ease to monitor the status of connections. Statuses will be one of the following:

Pending displays immediately when enabled in the Marketplace and will continue to show while Discrepancy Audits are completed.

Testing displays while the Ease team is sending test files and completing any other required testing.

Approved displays when the Ease team successfully completes connection testing.

Note: When a connection is declined, it is disabled in the Marketplace and does not appear in **ToDos** > **Connection** > **Status**.

Renew plans for open enrollment

Select the **Renew Plans** button to renew your plans prior to open enrollment (OE) to keep the existing EaseConnect+ connection in place. Once open enrollment is complete, click **Actions** > **Ready to Submit** on the group's Plans tab. Ease will send your OE changes to the partner, and you will receive an email notification when it is complete. If Ease needs your assistance, we will reach out via **Task**. Please reply to any outreach within five business days to ensure a smooth connection. **READ MORE: Open enrollment best practices for connections**.

Adding new lines to live connections

If your connected group has a new line of coverage with the partner, simply add the new plan to Ease using the **Actions** > **Add Plan** button on the group's **Benefits** tab. Ease will be notified, and you will be sent instructions via **Task**. You will receive an email notification when the new line of coverage is added to the connection.

Reconcile Ease with carrier invoices

To ensure enrollments are correct, we recommend reconciling Ease data with carrier data on a monthly basis. **READ MORE: Reconcile Ease with carrier invoice**.

EaseConnect+ connection support

Questions about your connections? Need to remove a live connection? Submit a support request at **help.ease.com** to reach your dedicated Ease team.

ease

Because benefits matter.