

Your Guide to Success With Ease Carrier Connections

We're excited to offer you an elevated benefits process for your new and existing groups' enrollments with EaseConnect and EaseConnect+. With Ease's carrier connections, you will:

- **Elevate Your Offerings** – Securely enroll employees, speed up ID card delivery, and get closer with your clients using the time you'll save.
- **Expand Your Service** – Confidently manage mid-year changes for businesses of all sizes.
- **Increase Commissions** – Add coverage and increase participation with online enrollment and direct carrier connections.

EaseConnect helps agencies offer businesses of all sizes better service through direct carrier connections.

	EaseConnect	EaseConnect+
Simple connection setup	✓	✓
Enrollment submitted directly to carriers	✓	✓
Groups down to 2 employees	✓	✓
Easily add new lines of coverage	✓	✓
Connection setup and maintenance is led by Ease with support from your agency		✓
Set up and use carrier connections for clients of all sizes	✓	✓
After setup is complete, adds, terms, and changes are sent directly from Ease to the carrier		✓

Check That The Data Matches

In order to experience the true value of these connections, it's important to verify that the information the carrier has on file matches the information in Ease. Making sure that the data matches in advance of setting up your carrier connections ensures that your connection set up process will run much more quickly and smoothly, and you won't have to go back and fix data discrepancies throughout the process.

Following are a few tips on how to optimize your data in Ease to streamline the connection process:



- To audit your data, download a census file from both Ease and the carrier(s) that you plan to use the connection for. If any discrepancies are found, now is the time to make those updates so that both files match.
- Make sure the fields in the following sections are accurate for each employee:
 - **Personal Profile** - Every field on each employee's Personal Profile tab will need to be filled out accurately, and match what the carrier has in their system.

Example: If the employee's name is Chris in Ease and Christopher in the carrier's system, you'll need to update Ease to Christopher.

- **Employment** - All fields in the Employment Profile section must be filled out accurately for each employee, except for HR Manager and Sick Hours. Those fields are not required for a carrier connection.
- **Benefits** - In order to take full advantage of these connections, make sure that all carrier plans for your groups are entered into Ease. Employees will need to be enrolled in the carrier plan in Ease in order to use the connection.
- When you have new business with a carrier and would like to use our connection during open enrollment, the account structure will need to be built prior to open enrollment*. If the account structure is not built prior to open enrollment, you will need to export the open enrollment information and send it to the carrier.

➤ [Click Here For More Information on Census Reports](#)

*Exceptions may vary per carrier.

Understanding Your Ease Workflows

Below are some Ease features and functions to keep in mind to help ensure that your connections are properly maintained so they run smoothly, indefinitely, and make your workflows even better.

Ease Features

These features are important to understand and implement throughout the lifecycle of a group to provide better service, reduce errors, and increase client satisfaction.

Company To-Dos Overview – View outstanding connection action items for each of your groups.


Qualifying Events – Ability to add life events such as marriage, divorce, and birth of a child to allow employees to make election changes outside new hire or open enrollment.

Manage Changes – Process and track employee adds, changes, and terms seamlessly with more details & filters.

Renew Plans – Copy plan details from the previous open enrollment period to quickly and easily renew plans year to year.

Connection Renewal Reminders – Ease will automatically remind you when an EaseConnect+ plan is ready for renewal.

Connected Plan Continuance – Ease will automatically keep any EaseConnect+ plans connected even if they were not renewed by the policy end date.



Red City School District

Profile

Employees

Benefits

Documents

ACA

EaseHR

Payroll

Logins

Marketplace

Settings

Overview

Details

Access

Organization

Company Overview

Account Type **Client** System Id **1a12345bc-a1b2-6c7d-e8f9-12g3h456i789j**
Agency **General Agency** Agent **Nina Zhen ninazhen@genagency.com** Active Employees **44**

Action Items

4 employees are missing information

[View](#)

Company is missing information

[View](#)

2 plans due to renew within 30 days

[View](#)

2 tasks need to be completed; 1 is overdue

[View](#)

7 employees have made changes in the last 14 days that have yet to be processed

[View](#)

Open Enrollment (Sep 4th - Mar 3rd)

[View](#)

Enrollment Progress is 80% complete (8 Not Started, 4 In Progress, 34 Finished)

[View](#)

Connected Partners

Status & information on partners connected in the marketplace.

Name	Status	Status Detail
Hickory Financial	<div><div></div>Approved (3/16/2021 - 28 days ago)</div>	Activity, Submissions, Manage
Howard Term Life	<div><div></div>Testing (3/12/2021 - 32 days ago)</div>	Activity, Manage
Junem Health	<div><div></div>Approved (3/11/2021 - 33 days ago)</div>	Submissions, Manage

Client Administrators

Name	Phone	Email	Location
Paul Grunyan	(777) 123-4567	PaulG@redcitysd.edu	(Scranton) PA
James Andonia	(777) 555-3333	JimAndonia@redcitysd.edu	(Scranton) PA
Katrina Anderson	(777) 456-7890	KatA@redcitysd.edu	(Scranton) PA

Ease Functions

These functions will guide you to help make sure the Ease features mentioned above are properly maintained.


Plan Eligibility – Determine which employees qualify for plans and when.

Salary Updates – Collect and/or generate required employee information from company's HR or payroll system reports.

Employee Fields – Store and manage employee personal, employment, benefits, and compliance information.

Lock Enrollment – Ability to lock and unlock enrollment for the employee during specific time periods.

Ready to Submit – Review the employee/group data in Ease and approve when it is ready to be sent to the carrier.



2021 Junem Health HMO Gold
Smith & Johnson LLC > Plans

< Switch to... >

Profile Eligibility Rates Contributions Forms Documents

Details

My Filters Actions

Policy number, waiting period, and tax information.

Policy Number
PN-12345

Waiting Period ⓘ
0

Tax Determination ⓘ
Pre-Tax

Subgroup Number
SG-12345

Waiting Period Type ⓘ
Days

Domestic Partner Tax Determination ⓘ
Post-Tax

Entry Date ⓘ
First of the Month

Employee Eligibility

Specify which employees are eligible for the plan. Leave fields blank to indicate that all employees are eligible.

Contingency Type ⓘ
Select

Type ⓘ
Select

Contingency Plans ⓘ
Select

Min Scheduled Hours Per Week ⓘ
35

Ineligible Employees ⓘ
Select

Max Scheduled Hour Per Week ⓘ

Employee Eligibility

Specify which employees are eligible for the plan. Leave fields blank to indicate that all employees are eligible.

☒ Spouse

☒ Domestic Partner (opposite-gender)

☒ Children

☒ Domestic Partner (same-gender)

☒ Other

☒ Other


EaseConnect+ Tools To Help You

With EaseConnect+, the Ease team works with your agency to manage the setup and maintenance of the carrier connections. The result is secure, direct submission of enrollment and change data from Ease to carriers. Below are a few tools to set you up for success with EaseConnect+.

EaseConnect Readiness

With EaseConnect Readiness, you can quickly and easily identify groups that are eligible for EaseConnect+ connections. With this tool, you can view eligibility snapshots, find missing information, and eliminate delays in the setup process.

> [Learn More](#)

 **To-Dos**

Changes Tasks **2** Connections Renewals

Missing Information Status Activity Readiness

Readiness [Generate Report](#)

Pre-connection, displays details of companies' readiness for using EaseConnect & EaseConnect+

Carrier All Company All


Company	Employees	Carrier	Effective Date	Plan Types	
Center City Urgent Care	45	Akarsban Financial	1/22/2021	Voluntary Life/AD&D	Details
Red City School District	44	Howard Life	3/16/2020	Life/AD&D	Details
MachineLearning Co	44	Harney Financial	8/30/2019	Term Life	Details

Tasks

As our team works with you to set up the carrier connection, there may be a few steps we need your help with to complete the connection process. Often these steps will be assigned to you via "Tasks" which you can access in your Ease account.

You can leverage Automatic Task Assignee to assign tasks to specific agency users for each group. Ease admins at the Agency level can choose which Ease user will receive task assignments for a specific company or set of companies.

> [Learn More](#)

 **To-Dos**

Changes Tasks **2** Connections Renewals

Manage Settings

Tasks [My Filters](#) [Actions](#)

Search by Title or Id Status Open

Partner [Howard Life](#) Company All Watcher All

Type Select Creator All Assignee Me

Due Date Overdue Updated All Created All

Title ↑	Type ↑	Partner ↑	Company ↑	Assignee ↑	Due ↑	Created ↑
Add DOB	General	Howard Life	Red City School District	You	3/31/21	3/18/21
Update Address	General	Howard Life	Red City School District	You	3/29/21	3/17/21
Confirm Age Bands	General	Howard Life	Red City School District	You	3/26/21	3/16/21

Missing Information


If Ease finds that there is any information missing when setting up the connection process for a group or employee, we will create a task for the assigned Agency User. These tasks will highlight what information needs to be collected for a successful employee enrollment.

> [Learn More](#)

EaseConnect Review

When using EaseConnect+, you and your company administrators may need to verify information that does not match between Ease and the connection partner before the connection is established. With EaseConnect Review (previously known as Discrepancy Audit), you can identify which system (Ease or the carrier) has the correct information. This will decrease the time it takes to set up a connection and ensure both systems (Ease and the carrier) have the same information.

> [Learn More](#)

 **To-Dos**

Changes Tasks **Connections 60** Renewals


[Missing Information \(60\)](#) Status Activity Readiness

Missing Information

For EaseConnect & EaseConnect+ connections in a testing or approved status, provides details of missing company and/or employee information required for successful data transfer.

Carrier All Company All Missing Type All

Company	Carrier	Impacted Plans	Impacted Employees	
1 - Red City School District	Howard Life	1	3	Details
1 - Eastern Shore Restaurant	Junem Health	1	1	Details
1 - Smith & Johnson LLC	Junem Health	0	1	Details

 **The Company Site**

Profile **Employees** Benefits Documents ACA HRIS Payroll Logins Marketplace Settings

EaseConnect Review

Complete Review View Task

There's a discrepancy between Ease and your carrier partner. Review the summary of changes below.
Please **click on the Partner or Ease value** to indicate which value is correct.
After "Task" disappears from the Action column, you're all set to review all changes by selecting 'Summary of Changes' in the Review drop down.
Once you've reviewed the summary, click 'Complete Review' to enable the connection.

Audit Date **3/25/2021 3:00 PM**

Review Tasks


Summary of Changes

Company	Partner	Ease	Action	
Alex Santos	Employee Type	Part-Time	Full-Time	Ease → Partner
Lisa Parker	Job Class	Sales	Customer-Service	Partner → Ease
Roseann Alvarez	Last Name	Alvarez	Alvarez	Ease → Partner
Garett Swanson	First Name	Garrett	Garett	Partner → Ease

EaseConnect Status

EaseConnect Status provides you with enhanced visibility when using EaseConnect+ connections to see where groups' plans are in the connection setup process.

> [Learn More](#)

**To-Dos**

Changes Tasks **Connections** Renewals

Missing Information **Status** Activity Readiness

Status

Provides connection status details.

Partner All

Company All


Status All

Company	Partner	Status	Status Details	
Red City School District	Howard Life	<div></div> Approved (3/16/2021 - 17 days ago)		Activity
Smith & Johnson LLC	Junem Health	<div></div> Pending (3/16/2021 - 17 days ago)		Activity
Machine Learning Co	Harney Financial	<div></div> Testing (3/10/2021 - 23 days ago)		Activity

EaseConnect Activity

EaseConnect Activity allows you to see exactly what was sent to a partner on both a company and employee level. This tool serves as an audit trail so you stay in the know about what information was sent to a partner and when.

> [Learn More](#)

**To-Dos**

Changes Tasks **Connections** Renewals

Missing Information Status **Activity** Readiness

Activity

Provides an audit trail of data transfers via connections.

Partner All

Company All

Status All

Date Range All Time

Date	Partner	Company	Employee	Details	Status
2/28/2021 10:31 AM 33 days ago	Howard Life	Red City School District	Devina McFarland	Voluntary Life/AD&D Devina McFarland: Enrolled (5/1/2018) - \$50,000	<div></div> Sent
2/22/2021 2:18 PM 39 days ago	Junem Health	Smith & Johnson LLC	Lisa Parker	Life Lisa Parker: Enrolled (3/1/2020) - \$10,000	<div></div> Sent

For Any Additional Questions

We're here to help you with any questions you may have throughout the connection process. If you have any additional questions, contact our support team at help.ease.com.