

# The Benefits Administration Toolkit

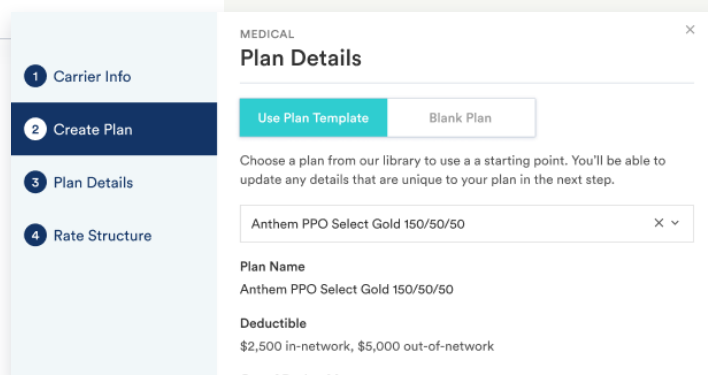
The Benefits Administration app gives admins or brokers the tools they need to administer your group benefits. This makes it possible for you to work with any broker and use Zenefits as your system of record, allowing you to utilize Zenefits to its fullest potential.

Each of the following tools are designed for admins or brokers so that they can: create and download benefits proposals, load custom benefits plans, launch and monitor open enrollment, and submit enrollments to insurance carriers.

1

## Load custom benefits plans

Zenefits offers the flexibility to create a custom plan, or you can use our Plan Library with over 8,000 plans to choose from. While you load your plan information, the rest of your team will be able to track your progress from their dashboard.



The screenshot shows the 'Plan Details' form in the Zenefits application. On the left is a sidebar with four steps: 1. Carrier Info, 2. Create Plan (highlighted in dark blue), 3. Plan Details, and 4. Rate Structure. The main form area is titled 'MEDICAL Plan Details' and includes a close button (X) in the top right corner. Below the title are two buttons: 'Use Plan Template' (highlighted in teal) and 'Blank Plan'. A text prompt reads: 'Choose a plan from our library to use a starting point. You'll be able to update any details that are unique to your plan in the next step.' Below this is a search bar containing the text 'Anthem PPO Select Gold 150/50/50' with a clear (X) and dropdown (v) icon. Further down, the 'Plan Name' is listed as 'Anthem PPO Select Gold 150/50/50'. The 'Deductible' section shows '\$2,500 in-network, \$5,000 out-of-network'. The bottom of the form is partially cut off, showing 'Out of Pocket Max'.

2

## Launch Open Enrollment

Once renewal information is loaded, you can send automated email invitations to employees. This email includes all the information and deadlines that employees need to participate in open enrollment.

### Open Enrollment Period

We'll invite your employees to enroll once your open enrollment period starts, and let them know the deadline for choosing plans.

#### Open Enrollment Dates

08 / 15 / 2018



to

08 / 31 / 2018



3

## Monitor Open Enrollment

During open enrollment you can monitor employee progress, edit dates for open enrollment, or send email reminders for your employees.

### Track your employees' enrollment progress.

Your employees have been invited to enroll in your company's health benefits. They have until the following end dates to choose their plans.



Medical

Ends Jun 27



Dental

Ends Jun 27

View Progress

Manage Employees

4

## Submit enrollments to insurance carriers

After employees enroll in benefits or open enrollment ends, Zenefits will automatically generate tasks and email reminders that include the information you need to send to carriers. Depending on your Zenefits package, company size, and carrier, you may also have access to EDI and form automation.

### 5 Open Tasks

Search Employees 1-5 (of 5)

<input type="checkbox"/>	Name/Event	Carrier	Group	Effective	
<input type="checkbox"/>	Brittany Long New Hire	Guardian AZ Dental, Vision	Ben Connect Demo - Renewals Management	03/01/2018	BC
<input type="checkbox"/>	Lisa Park New Hire	Blue Cross Blue Shield of Arizona AZ Medical	Ben Connect Demo - Renewals Management	04/01/2018	BC
<input type="checkbox"/>	Lisa Park New Hire	Guardian AZ Dental, Vision	Ben Connect Demo - Renewals Management	04/01/2018	BC
<input type="checkbox"/>	Derrick Jones New Hire	Guardian AZ Dental, Vision	Ben Connect Demo - Renewals Management	11/01/2018	BC
<input type="checkbox"/>	Derrick Jones New Hire	Blue Cross Blue Shield of Arizona AZ Medical	Ben Connect Demo - Renewals Management	11/01/2018	BC

## Ongoing maintenance is simple in Zenefits

Zenefits will automatically invite new hires to enroll in coverage. Employees have year round access to Zenefits and can make changes as they need. Each time, our system auto generates enrollment tasks and syncs with your payroll to automatically update employee deductions.