

Benefit Enrollment Dashboard

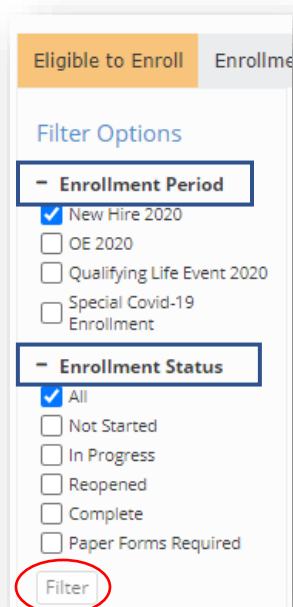
The Benefit Enrollment Dashboard is used to review, approve, and reject enrollment information in iSolved. This document will review the functionality of each tab listed on the Benefit Enrollment Dashboard.

Step 1: Access the Benefit Enrollment Dashboard

Employee Management > Employee Management Tools > Benefit Enrollment Dashboard

Step 2: Review 'Eligible to Enroll' Tab

- This tab will show all employees currently eligible to enroll.
- The left-side of the screen will show 'Filter Options.' If you have multiple wizards built in iSolved, all wizards will populate under 'Enrollment Period.' You will then need to select the checkbox of the Enrollment Wizard you wish to review. You can also decide if you would like to look at eligibility based on a specific 'Enrollment Status.' Once all filter options are selected, click 'Filter.'



The screenshot shows the 'Eligible to Enroll' tab selected. Below the tab name is a 'Filter Options' section. It contains two expandable sections: 'Enrollment Period' and 'Enrollment Status'. Under 'Enrollment Period', the 'New Hire 2020' checkbox is checked, while 'OE 2020', 'Qualifying Life Event 2020', and 'Special Covid-19 Enrollment' are unchecked. Under 'Enrollment Status', the 'All' checkbox is checked, while 'Not Started', 'In Progress', 'Reopened', 'Complete', and 'Paper Forms Required' are unchecked. A 'Filter' button is located at the bottom of the filter options, circled in red.

- Once you select 'Filter,' iSolved will populate the following information:
 - Employee Number and Name
 - Life Event Date and Type (if applicable – New Hire & Qualifying Life Event wizards)
 - Enrollment Status (In Progress, Complete, etc.)
 - Number of Days Left to Enroll
 - Wizard Completion Date (if applicable)

Company Name	EE Number	Name	Life Event Date	Life Event Type	Enrollment Status	Days Left to Enroll	Completed Date/Time
Skyla Morgan Unicorns and Drea...	1236	Johnson, Ashley	08/25/2020	New Hire	Complete	30	8/25/2020 2:38 PM

Step 3: Review 'Enrollments – In Progress' Tab

- This tab will show enrollments for employees who started their wizard, but did not complete their wizard.
- The left-side of the screen will show 'Filter Options.' If you have multiple wizards built in iSolved, all wizards will populate under 'Enrollment Period.' You will then need to select the checkbox of the Enrollment Wizard you wish to review. You can also decide if you would like to review based on specific plan types under 'Benefit Plan Type.' Once all filter options are selected, click 'Filter.'

Filter Options

Enrollment Period

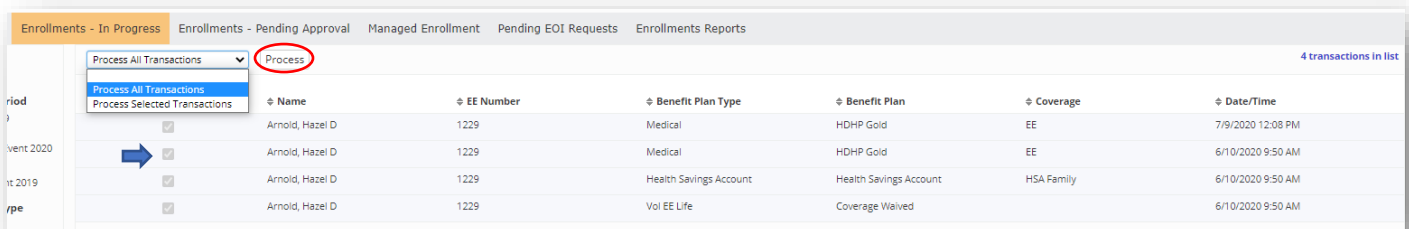
- Special Covid-19 Enrollment
- Qualifying Life Event 2020
- New Hire Test
- Open Enrollment 2019

Benefit Plan Type

- All
- Health Savings Account
- Medical
- Vol EE Life

Filter

- Once you select 'Filter,' iSolved will populate the following information:
 - Employee Number and Name
 - Benefit Plan Type, Benefit Plan Name, and Coverage Level
 - Date and Time that Employee Selected Benefit
- You will have the opportunity to either 'Process All Transactions' or 'Process Selected Transactions.' If you select 'Process All Transactions' the system will automatically check the box to the left of each enrollment listed. If you select 'Process Selected Transactions,' you will need to check the box next to the rows you would like to process and then Process.
- **IMPORTANT:** The Enrollments – In Progress tab is not used to approve enrollments. This tab will only show you the enrollments that have been selected, but not submitted for approval. 'Processing' these transactions means clearing them off of this tab so that they no longer exist.
 - If you process a transaction for an employee whose wizard is still open, the wizard will go back to its initial settings, meaning the employee will have to make all selections again.
 - If you process a transaction for an employee whose wizard is no longer open, it will simply remove the election as an In-Progress enrollment.



Step 4: Review 'Enrollments – Pending Approval' Tab

- This tab will show enrollments for employees who completed their enrollment wizard by submitting their selected benefits.
- The left-side of the screen will show the same Filter options as the Enrollments – Pending Approval tab.
- Once you select 'Filter,' iSolved will populate the following information:
 - Employee Number and Name
 - Benefit Plan Type, Benefit Plan Name, and Coverage Level

- Date and Time that Employee Submitted Benefit

- You will have the ability to Approve or Reject per enrollment by selecting the corresponding check-box next to the plan and selecting 'Process Selected Transactions.'
- If you would like to Approve or Reject all enrollments at once, you can select either 'Approve All Transactions' or 'Reject All Transactions.' For these options, iSolved will automatically check every enrollment box without you selecting them beforehand.
- Once you have selected one of the options listed above from the drop-down menu, click 'Process.'
- All approved enrollments will automatically transfer to the employees benefit plan screen under Employee Management > Employee Benefits > Benefit Plans.

ts - In Progress | Enrollments - Pending Approval | Managed Enrollment | Pending EOI Requests | Enrollments Reports

Process | 11 transactions in list

Approve	Reject	Name	EE Number	Benefit Plan Type	Benefit Plan	Coverage	Date/Time
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Medical	HDHP Gold	EE	8/25/2020 2:36 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Dental	PPO	EE+1	8/25/2020 2:36 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vision	Vision	EE+1	8/25/2020 2:37 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Health Savings Account	Health Savings Account	HSA Single	8/25/2020 2:37 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	FSA Medical	Coverage Waived		8/25/2020 2:37 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Long Term Disability	Long Term Disability	EE	8/25/2020 2:38 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	LTD Buy-Up	LTD Buy-Up	EE	8/25/2020 2:38 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Basic Life/AD&D	Basic Life/AD&D- Class 2	EE	8/25/2020 2:37 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vol EE Life	Guardian Vol EE Life/AD&D	EE	8/25/2020 2:37 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vol SP Life	Guardian Vol SP Life/AD&D	Spouse Only	8/25/2020 2:38 PM
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vol CH Life	Coverage Waived		8/25/2020 2:38 PM



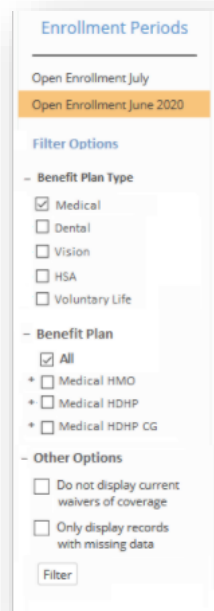
ts - In Progress | Enrollments - Pending Approval | Managed Enrollment | Pending EOI Requests | Enrollments Reports

Approve All Transactions | Process | 11 transactions in list

Approve All Transactions	Reject	Name	EE Number	Benefit Plan Type	Benefit Plan	Coverage	Date/Time
<input type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Medical	HDHP Gold	EE	8/25/2020 2:36 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Dental	PPO	EE+1	8/25/2020 2:36 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vision	Vision	EE+1	8/25/2020 2:37 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Health Savings Account	Health Savings Account	HSA Single	8/25/2020 2:37 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	FSA Medical	Coverage Waived		8/25/2020 2:37 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Long Term Disability	Long Term Disability	EE	8/25/2020 2:38 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	LTD Buy-Up	LTD Buy-Up	EE	8/25/2020 2:38 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Basic Life/AD&D	Basic Life/AD&D- Class 2	EE	8/25/2020 2:37 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vol EE Life	Guardian Vol EE Life/AD&D	EE	8/25/2020 2:37 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vol SP Life	Guardian Vol SP Life/AD&D	Spouse Only	8/25/2020 2:38 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Johnson, Ashley	1236	Vol CH Life	Coverage Waived		8/25/2020 2:38 PM

Step 4: Review 'Managed Enrollment' Tab (if applicable)

- This tab is only used if you have worked with a Benefit Consultant to set up default enrollment assignments for employees who do not complete their enrollment wizards.
- The left-side of the screen will show 'Filter Options.' You will have the ability to Filter by Enrollment Period, Benefit Plan Type, Benefit Plan, and Other Options, such as waived enrollments. Once all filter options are selected, click 'Filter.'



The screenshot shows a mobile application interface for 'Enrollment Periods'. At the top, there are two options: 'Open Enrollment July' and 'Open Enrollment June 2020', with the latter highlighted in orange. Below this is a 'Filter Options' section with three expandable categories: 'Benefit Plan Type', 'Benefit Plan', and 'Other Options'. Under 'Benefit Plan Type', there are checkboxes for Medical (checked), Dental, Vision, HSA, and Voluntary Life. Under 'Benefit Plan', there are checkboxes for All (checked), Medical HMO, Medical HDHP, and Medical HDHP CG. Under 'Other Options', there are checkboxes for 'Do not display current waivers of coverage' and 'Only display records with missing data'. A 'Filter' button is located at the bottom of the filter options.

- Once you select 'Filter,' iSolved will populate the following information:
 - Employee Number and Name
 - Current Benefit Plan and Coverage Level
 - Start and Stop Date of Current Enrollment
 - New Benefit Plan Name and Coverage Level
 - Start Date of New Enrollment
- Like the Pending Approval & In Progress tabs, you will have the opportunity to 'Process All Transactions' or select certain enrollments and 'Process Selected Transactions.' You will also have the opportunity to change the New Benefit Plan and New Coverage code prior to processing the enrollment.

- All approved enrollments will automatically transfer to the employees benefit plan screen under Employee Management > Employee Benefits > Benefit Plans.
- **Important:** All enrollments in the Pending Approval & In Progress tabs must be processed in order for the Managed Enrollments tab to populate.
- **Important:** The Managed Enrollments tab will display for an enrollment that stems from a wizard with a close date prior to today's date but is within 30 days after the plan year benefit start date.

In Progress Enrollments - Pending Approval **Managed Enrollment** Pending EOI Requests Enrollments Reports

4534 transactions in list Page 1 of 10 Next >

	Name	EE Number	Current Benefit Plan	Current Coverage	Start Date	Stop Date	New Benefit Plan	New Coverage	New Start Date
<input type="checkbox"/>	1, Employee	1000	Medical HMO CG	FAM	01/13/2020	05/31/2020			
<input type="checkbox"/>	10, Employee	1009	Medical HMO CG	FAM	02/01/2020	05/31/2020			
<input type="checkbox"/>	16, Employee	1015	Medical HDHP	FAM	01/01/2020	05/31/2020	Medical HDHP	FAM	06/01/2020
<input type="checkbox"/>	21, Employee	1020	Medical HMO	EE Only	11/01/2019	05/31/2020			
<input type="checkbox"/>	23, Employee	1022	Medical HDHP	EE Only	01/01/2019	05/31/2020	Medical HDHP	EE Only	06/01/2020
<input type="checkbox"/>	29, Employee	1028	Medical HMO	EE+CH	01/01/2019	05/31/2020	Medical HMO	EE+CH	06/01/2020
<input type="checkbox"/>	43, Employee	1042	Medical HMO	EE+CH	01/01/2019	05/31/2020	Medical HMO	EE+CH	06/01/2020
<input type="checkbox"/>	44, Employee	1043	Medical HMO	EE Only	01/01/2020	05/31/2020	Medical HMO	EE Only	06/01/2020
<input type="checkbox"/>	47, Employee	1046	Medical HDHP	EE Only	12/01/2019	05/31/2020	Medical HDHP	EE Only	06/01/2020
<input type="checkbox"/>	51, Employee	1050	Medical HMO	EE Only	01/01/2019	05/31/2020	Medical HMO	EE Only	06/01/2020
<input type="checkbox"/>	52, Employee	1051	Medical HDHP	EE Only	01/02/2020	05/31/2020	Medical HDHP	EE Only	06/01/2020
<input type="checkbox"/>	56, Employee	1055	Coverage Waived		01/01/2019	05/31/2020	Medical HDHP	EE Only	06/01/2020
<input type="checkbox"/>	61, Employee	1060	Medical HMO	EE Only	01/01/2019	05/31/2020	Medical HMO	EE Only	06/01/2020
<input type="checkbox"/>	66, Employee	1065	Medical HDHP	EE Only	01/01/2019	05/31/2020	Medical HDHP	EE Only	06/01/2020
<input type="checkbox"/>	68, Employee	1067	Medical HDHP	EE Only	01/01/2019	05/31/2020	Medical HDHP	EE Only	06/01/2020

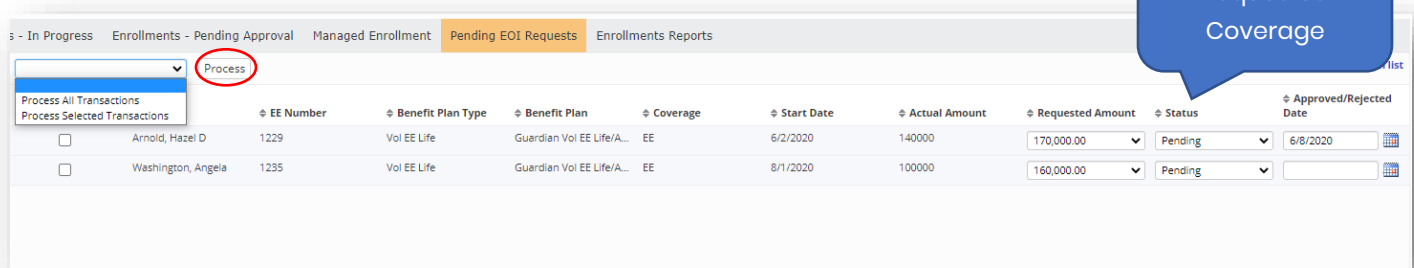


Process

- Process All Transactions
- Process Selected Transactions

Step 5: Review 'Pending EOI Request' Tab (if applicable)

- This tab is used to approve enrollment amounts for plans that allow requested coverages (Example – Voluntary Life and AD&D).
- The left-side of the screen will show 'Filter Options.' You will have the ability to Filter by Enrollment Period, Benefit Plan Type, and Benefit Plan. Once all filter options are selected, click 'Filter.'
- If you are approving or rejecting a requested amount, you will then process the transaction in the same manner as the Pending Approval & In Progress tabs.
- For an in-depth review of Pending EOI approval, please refer to the 'Benefit Enrollment Dashboard – Pending EOI Approval' document.



Approve/Reject Requested Coverage

	EE Number	Benefit Plan Type	Benefit Plan	Coverage	Start Date	Actual Amount	Requested Amount	Status	Approved/Rejected Date
<input type="checkbox"/>	Arnold, Hazel D	Vol EE Life	Guardian Vol EE Life/A...	EE	6/2/2020	140000	170,000.00	Pending	6/8/2020
<input type="checkbox"/>	Washington, Angela	Vol EE Life	Guardian Vol EE Life/A...	EE	8/1/2020	100000	160,000.00	Pending	

Step 6: Review 'Enrollments Reports' Tab

- This tab is used to pull Enrollment Period specific reports.
- Reports available:
 - Approval Status: Shows approval status (Pending Approval/Approved) and who approved the enrollment
 - Approval Status – Life Events: Same as above, except includes life event and life event date
 - Benefit Enrollment E-Signature Acknowledgement: Shows enrollment status and date/time of employee e-signature
 - Election Summary by Employee: Shows enrollments per employee
 - Election Summary by Plan: Shows enrollments per plan
 - Enrollment Status: Shows employee enrollment status (Complete/Incomplete/In Progress)

- Enrollment Status – Life Events: Same as above, except includes life event and life event date
 - Managed Enrollment: Shows managed enrollments if applicable
- Note: All reports can be pulled in either PDF or Excel

The screenshot shows a web interface for generating enrollment reports. At the top, there are navigation tabs: "Enroll", "Enrollments - In Progress", "Enrollments - Pending Approval", "Ma", and "Enrollments Reports". Below the tabs, there are three dropdown menus: "Enrollment Period:" with "OE 2020" selected, "Enrollment Report:" with "Approval Status" selected, and "Output Type:" with "PDF" selected. A blue callout box with a pointer to the dropdowns contains the text "Select Enrollment Period, Enrollment Report, and Output Type". A red circle highlights the "Generate Report" button at the bottom of the form.