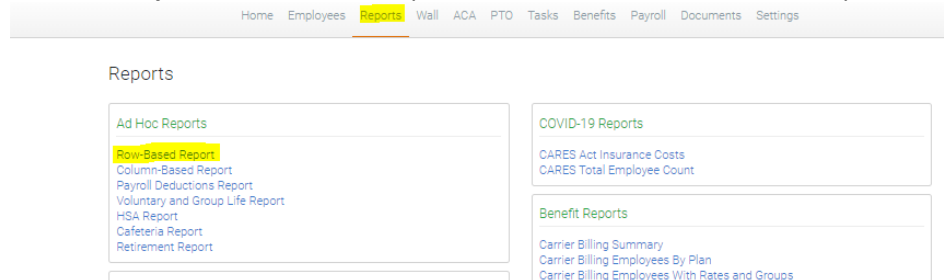


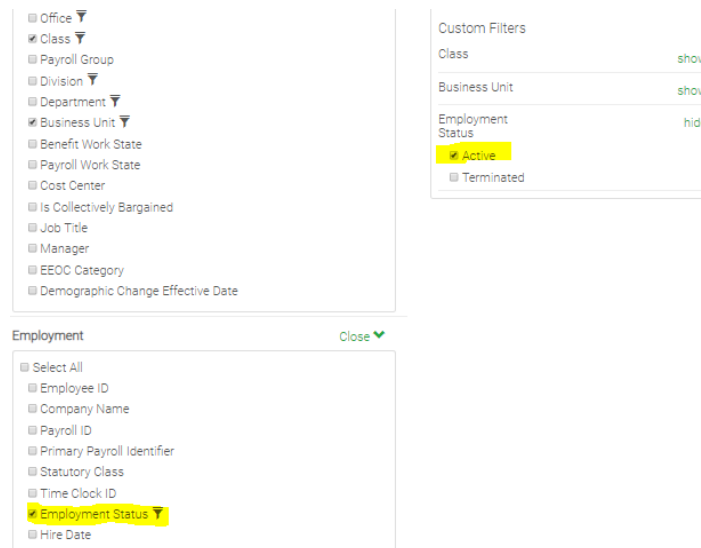
Pre-Renewal Check List

- 1. Review Your Active Employee List** – a simple Row-Based Report in Employee Navigator will help you create a list of all active employees that should be included in the next open enrollment.

To Run a Report – Click on the Reports Tab, then select Row Based Report:



You can include any fields that might be helpful by checking the box. Remember to filter by employment status if you only want to include Active employees:



We suggest at a minimum to review for the following changes/updates:

- Recent Terminations
- Recent New Hires
- Salary Changes *important if you are offering life and disability products*
- Email Address Updates

If you are an employer utilizing the ACA reporting feature, it is also important to review all ACA statuses and update hours for variable hour employees. If you need assistance with this, please contact our office for additional guidance.

2. Confirm Payroll Schedule –

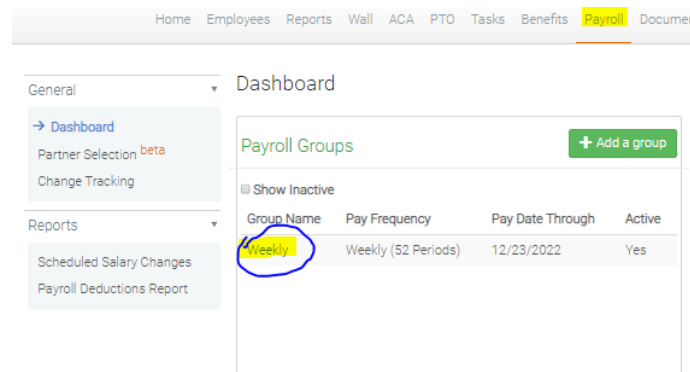
Employee Navigator is a rules-based system that calculates deductions using the following parameters:

- Plan Start and End date
- Payroll frequency (assigned to specific employees)
- Actual payroll dates

The payroll calendar has been populated using your general payroll frequency rules (weekly, bi-weekly, monthly, etc.). Since our office is not involved in your payroll process, it is important that you confirm these payroll dates are correct so we can ensure the correct deduction amount will be calculated.

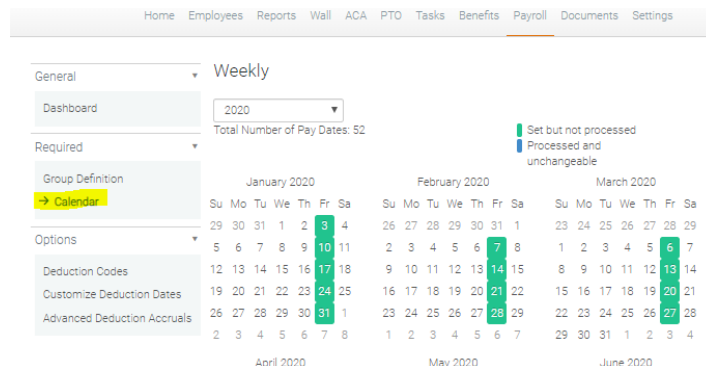
NOTE*** Based on payroll frequency/dates and rolling calendars, there MAY BE times that the number of payroll cycles between a plan start date and end date does not equal a full (12, 26, or 52) pay cycles. Employee Navigator makes us aware when this may occur, and we can determine the best approach for updating accordingly.

To View Current Payroll Calendar: select Payroll tab then click on the group name link (circled below)



The screenshot shows the 'Payroll' tab selected in the top navigation bar. On the left, the 'General' sidebar has 'Dashboard' selected. The main area displays 'Payroll Groups' with a table containing one entry: 'Weekly' (circled in blue), 'Weekly (52 Periods)', '12/23/2022', and 'Yes'.

To see actual payroll dates, click Calendar on the left-hand side:



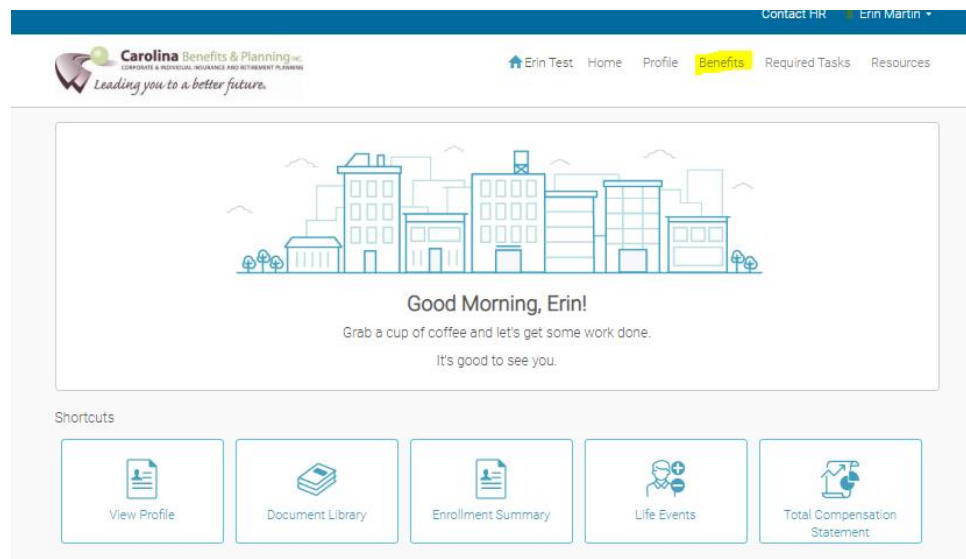
The screenshot shows the 'Calendar' view for the 'Weekly' group. The left sidebar has 'Calendar' highlighted. The main area displays a calendar for 2020, showing payroll dates for January, February, March, April, May, and June. A legend indicates that green numbers represent 'Set but not processed' and blue numbers represent 'Processed and unchangeable'.

*You do not have permissions to make changes to these dates, as to avoid any unintended consequences. If you see that dates need to be updated, please contact our office.

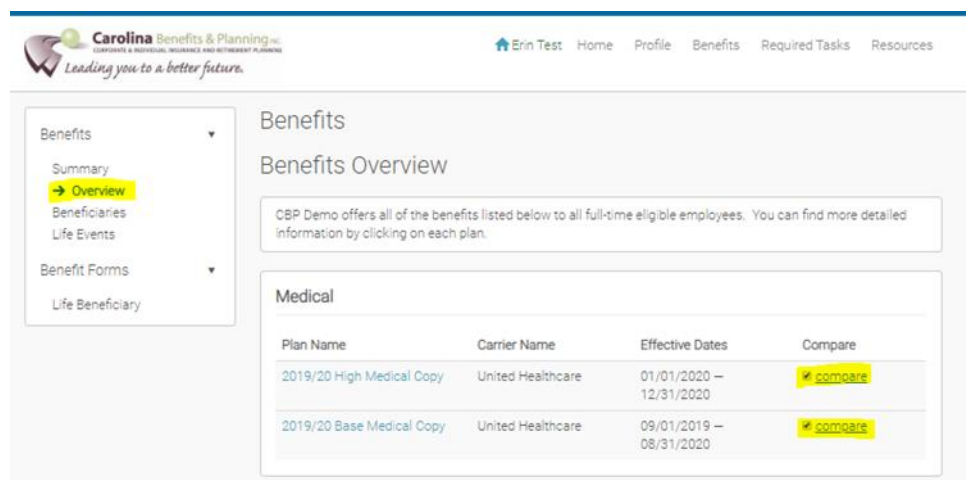
3. Confirm Deduction Amounts-

Deduction amounts can only be confirmed once all decisions have been made and the new plans have been renewed in Employee Navigator. Our office will notify you when this has been completed so that you can review for accuracy.

To view Deduction Amounts: toggle to your employee homepage and click the Benefits Tab



Then click Overview on the left-hand side of the page. You can select plans to display rates.



When more than one plan is available, you can see a side-by-side comparison. Please note it will show rates on YOUR payroll frequency and age band.

Pay Period Costs		
	2019/20 High Medical Copy	2019/20 Base Medical Copy
Coverage Level		
Employee	\$57.95	\$0
Employee + Spouse	\$369.74	\$199.05
Employee + Child(ren)	\$322.97	\$169.20
Employee + Family	\$712.71	\$418.01
Employee + Domestic Partner	\$369.74	\$199.05