Welcome Kit

BENEFITFOCUS HR INTOUCH™

About Benefitfocus®:

Benefitfocus is the largest healthcare benefits software provider in the U.S., streamlining electronic benefits enrollment and communication for millions of employees annually. Our solutions help employers and their employees simplify the enrollment process while managing complex decisions in the ever-changing benefits landscape.

About HR InTouch™:

The Benefitfocus Platform, in combination with the HR InTouch Application, provides employers with a comprehensive and powerful online portal that supports benefit enrollment, employee communication, HR efficiency, and health and wellness promotion. It can be customized to reflect your company's unique brand and content. The HR InTouch App helps your HR department become more efficient while promoting a healthy, engaged and empowered workforce.

 As an HR administrator, HR InTouch allows you to be in complete control of your company's site. You can easily manage the content, branding and messaging within the portal so that it accurately reflects your organization's culture and objectives. As corporate initiatives evolve, the application's user-friendly editing tools enable you to conveniently make changes to your site at any time – without the assistance of your IT department.
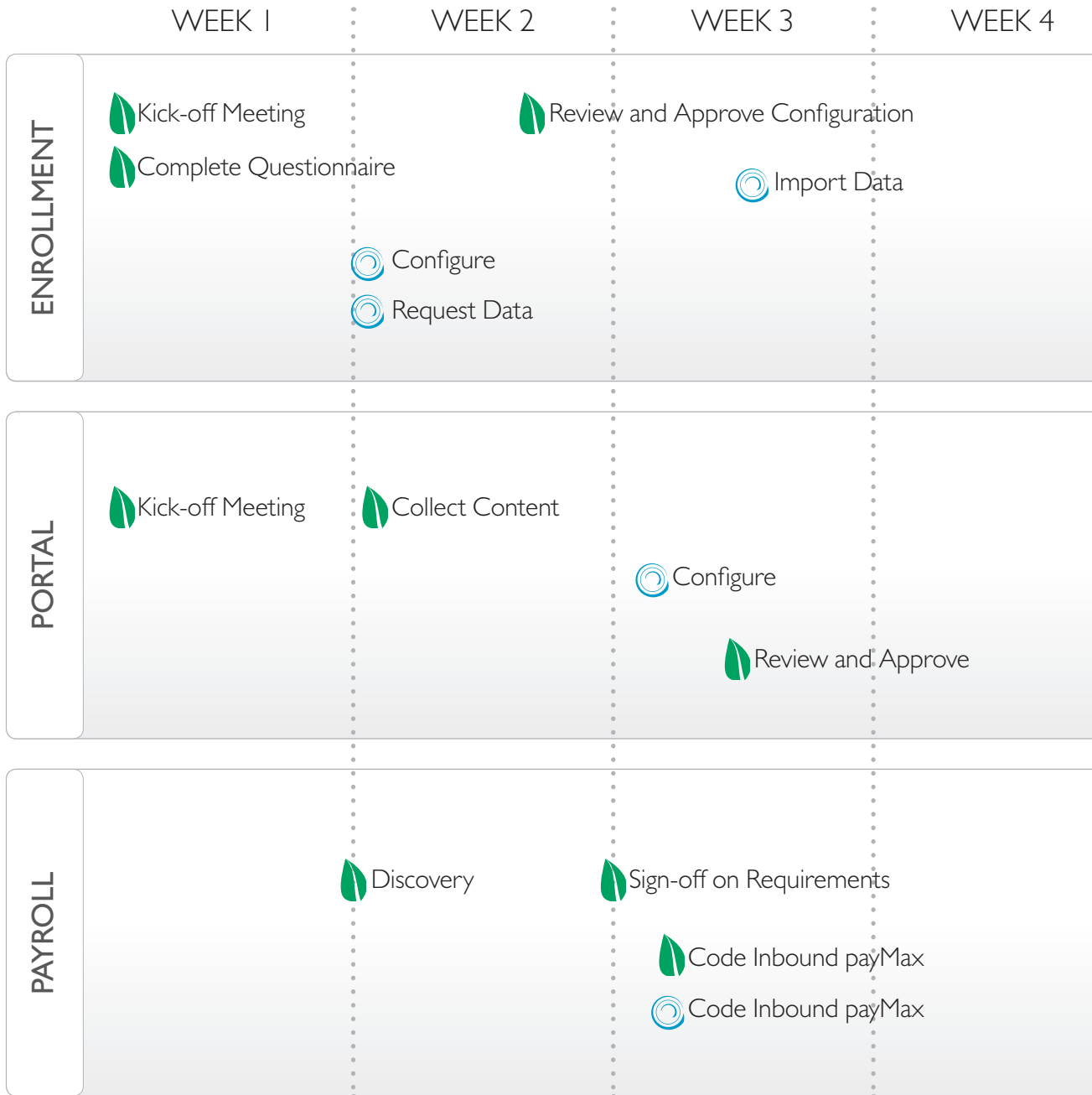
HR InTouch™ WELCOME KIT

ONLINE ENROLLMENT & EMPLOYEE PORTAL

As we start working together to implement your HR InTouch site, here is what you can expect:

1. **Sign Up** – Done! You're ready to start

2. **Kick-off Call** – We collect your company's information and requirements

3. **Set up / Configure**

   - **Brand & Build: We design the site to reflect your unique brand.**
   - **Data Links: We gather benefit plan and carrier information for the online enrollment system.**
   - **Census Load: We load your employee data including current benefit elections (Benefitfocus will notify your carriers to request this data from them).**

4. **Review and Approve** – You review and approve your custom site.

5. **Training** – We will train your HR staff on how to use the HR InTouch administrator tools.

6. **Testing, Resolve and Sign Off** – You review exceptions, test files, and provide final approval.

7. **Rollout** – You provide login information to your employees.

HR InTouch Implementation Timeline

	WEEK 1	WEEK 2	WEEK 3	WEEK 4

ENROLLMENT

Kick-off Meeting

Complete Questionnaire

Review and Approve Configuration

Import Data

Configure

Request Data

PORTAL

Kick-off Meeting

Collect Content

Configure

Review and Approve

PAYROLL

Discovery

Sign-off on Requirements

Code Inbound payMax

Code Inbound payMax

	WEEK 5	WEEK 6 - 11	WEEK 12 - 16
	Resolve Exceptions		
	Internal Testing		
		Go Live!	
	Go Live!		
		User Acceptance Testing	Go Live!
	Internal Testing payMax		
		Set Up Secure File Transfer	

Benefitfocus   Client

Online Enrollment

We will need about one hour for a kick-off call. We will be scheduling this with you shortly.

Here is a list of suggested individuals we will need on the kick-off call:

- Benefits Manager

- Human Resources Administrator

- Marketing or Corporate Communications representative

Here is a list of things you will need to have ready for the call:

- Benefit Summaries or Plan Documents for each product you offer

- On the enclosed USB jump drive, you will find a benefit questionnaire, change reason profile and authorization form. Please have these documents completed in preparation for the call.

- Web site address you will use for your HR InTouch site, such as https://<yourcompanyname>.hrintouch.com (consult your IT department for assistance)

- Web-ready logo in high resolution .jpeg or .png format

- A copy of your company's corporate style guide, if available

- Electronic documents such as handbooks, policy manuals and benefit summary plans

- Links to other resources you plan to provide, such as: insurance carrier websites, internal company websites, etc.

- Images from your corporate library

Questionnaire

Prior to the kick-off call, please complete the online enrollment questionnaire that provides us with your company's benefit offerings, business rules and structure. This is what we'll use to set-up your benefits. Take a look at the example questions below.

- *What is the group number?*
- *What is the name of the plan/ type?*
- *Who is eligible for Life and AD&D?*
- *When are employees eligible for this benefit?*
- *What termination rules apply to this plan?*
- *Is the plan salary based or is there a flat rate?*
- *What are the coverage levels?*
- *What are the effective dates of salary changes?*
- *What is the Guaranteed Issued Amount?*

Change Reason Profile

You can define one or more "change profiles" that specify your unique business rules for each life event or qualified change. You can define events that are used for off-cycle, initial and open enrollment or both.

The first step in defining a change reason profile is to determine which "events" (such as birth, divorce or adoption) apply. Second, you will define several other rules for each event, such as:

- The applicability of the event (off-cycle, initial and open enrollment, or both)
- The period of time that the member must notify the carrier/employer of the event
- The types of changes permitted (plan change, dependent additions, drops, etc.)
- Effective and/or end date rules
- The status (timely, late or special) of any added members

When a change reason is used for initial or open enrollment, it is only applicable when the user wants to change his election after it was initially saved. For example, when an employee makes an election during his initial enrollment, he will not be prompted for a change reason. However, if he later attempts to change the saved election, he will be prompted for a change reason.

Payroll Integration

We will need two to four hours for the payroll integration discovery. During this session, we will cover the implementation process and the information needed to complete your payroll integration.

Here is a list of suggested individuals we will need on the call:

- Human Resources Administrator
- Payroll Manager
- HRIS or IT Representative
- External Payroll Representative

Here is a list of things you will need to have ready for the kick-off call:

- A list of deduction codes from your Payroll system which reflect plan and coverage levels
- A copy of our Standard Payroll Implementation Guide can be found on the enclosed USB jump drive.

Video Libraries

HR InTouch video libraries allow you to deliver clear and consistent information to employees in the medium they prefer: online, on-demand video. HR InTouch is equipped with hundreds of ready-to-go videos covering various topics in the following categories:

- Benefits
- Human Resources
- Health and Wellness
- Productivity

Video is the fastest and most efficient way to communicate with your employees, and with HR InTouch, they can access hundreds of informative videos online 24/7. With new videos added every month, you will always offer a comprehensive range of on-demand information to your workforce.

BENEFITF⊙CUS®

All Your Benefits. One Place.™