

ease



DICKERSON
INSURANCE SERVICES
AN **ALERA GROUP** COMPANY

Beyond Online Enrollment

The collage displays four overlapping screenshots of a web application interface, all featuring a blue and white color scheme and a profile icon placeholder labeled "San Francisco, CA".

- Top Left Screenshot: Company Directory**
Shows a grid of employee initials: BJ, KK, RS, ES, OJ, LK. A sidebar menu includes "Directory".
- Top Middle Screenshot: Performance Review**
Features a "Performance Review" title, a progress bar, and radio button options: "Single Answer" (selected), "Multiple Answer", "Star Rating", and "Rating Scale". An "EMPLOYEE COUNT" indicator shows 8/24.
- Top Right Screenshot: Survey Preview**
Includes a "Survey Preview" title, a progress bar, radio button options for "Yes" and "No", and a numerical scale from 1 to 10.
- Bottom Right Screenshot: Company Growth**
Shows a "Company Growth" title, three data cards: "COMPANIES" (12), "EMPLOYEES" (88), and "COMPANY CHANGES" (121). Below is a bar chart with a line graph overlay, showing data from April 1st to June 1st.

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Introduction

As your broker, we're always looking for ways to save time and increase employee engagement.

Ease, the technology behind your online enrollment solution, does more than just benefits. They have several year-round capabilities to help you build a custom HR and benefits path.

With our input, they wrote this guide to help businesses learn more about the full potential of their platform.



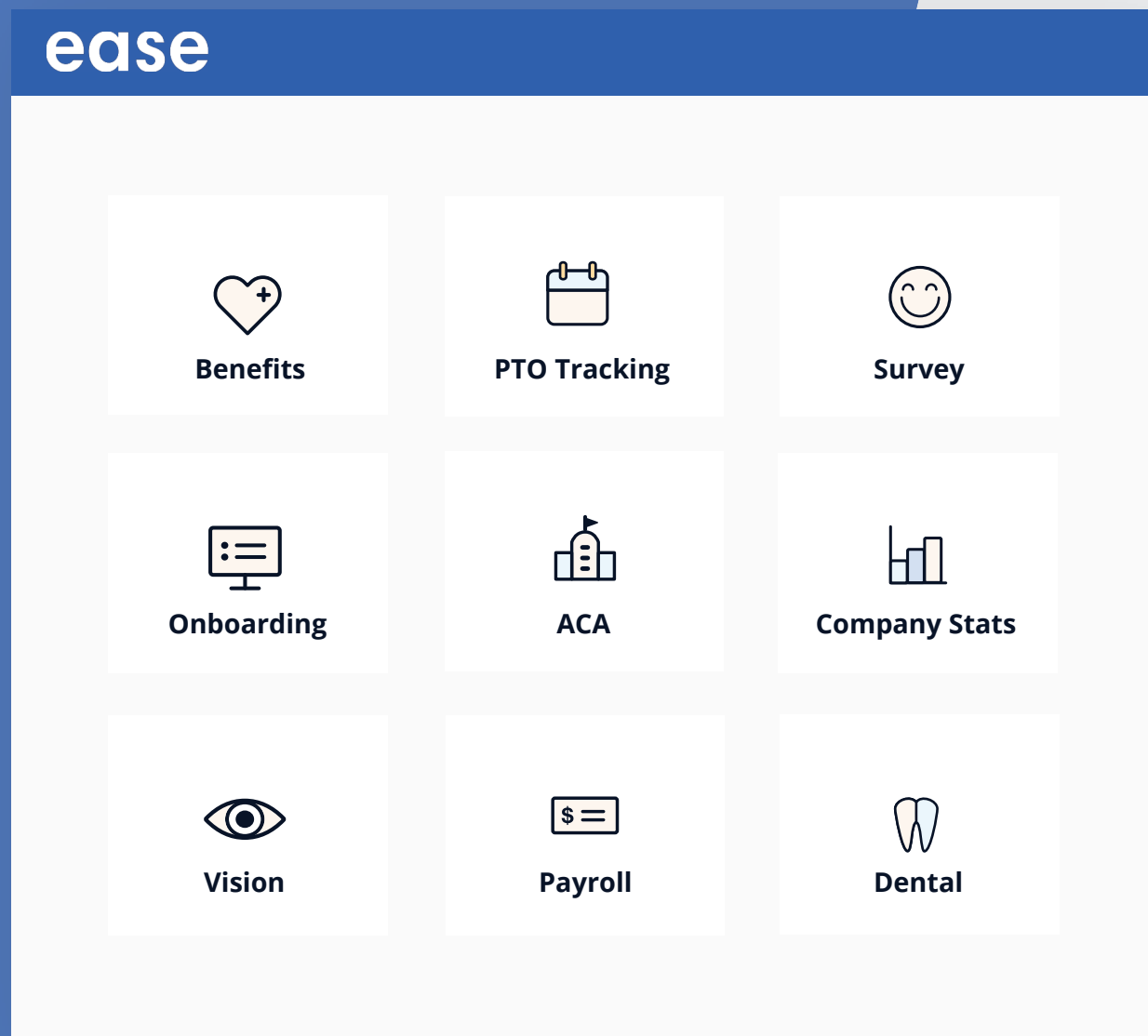
Enrollment is complete, now what?

Thanks for using Ease, the technology behind your online enrollment solution.

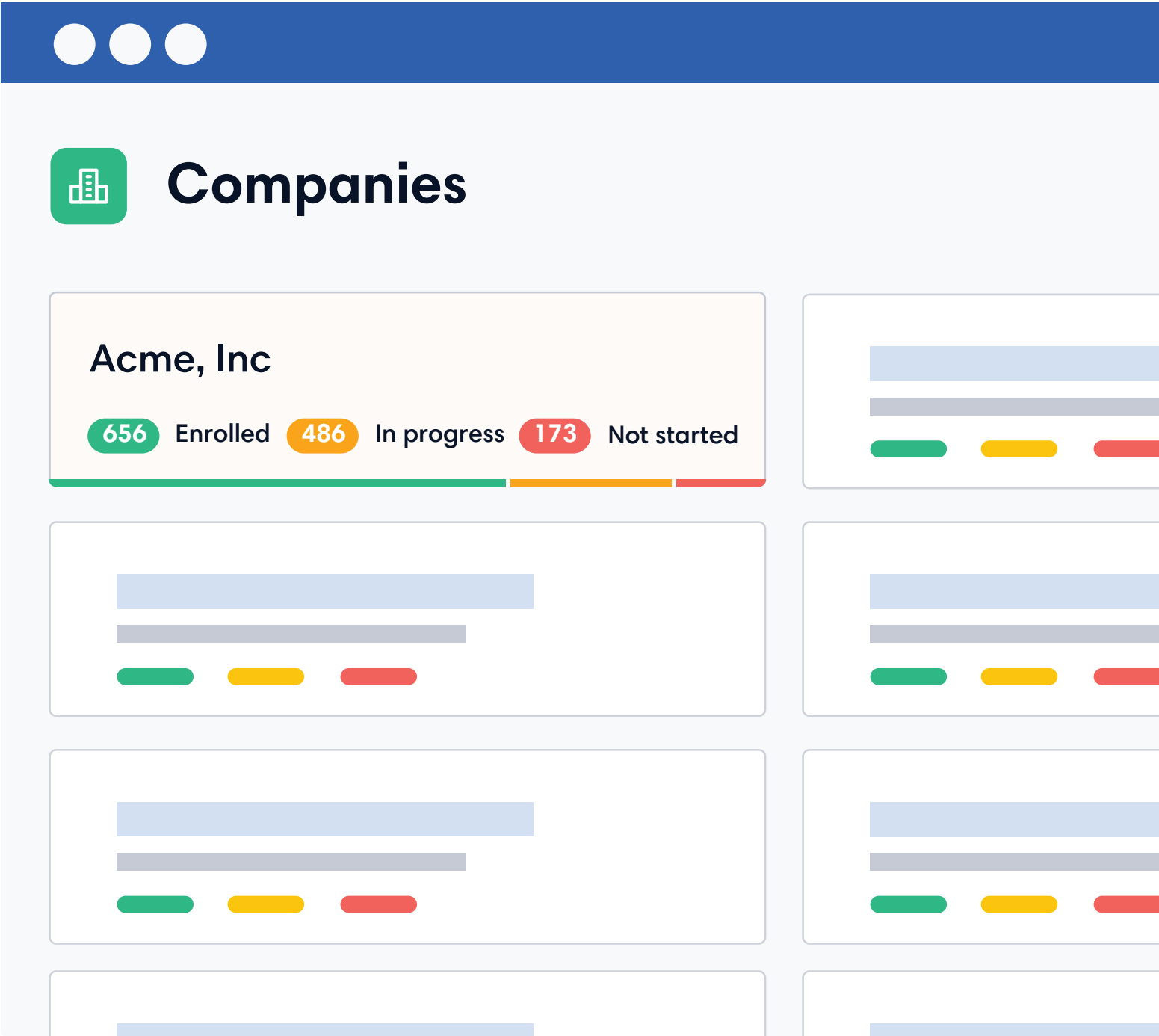
We think businesses should ask more of their benefits software. Whether it's software we've built, or integrations with the best-in-class partners, Ease offers a lot more than online enrollment.

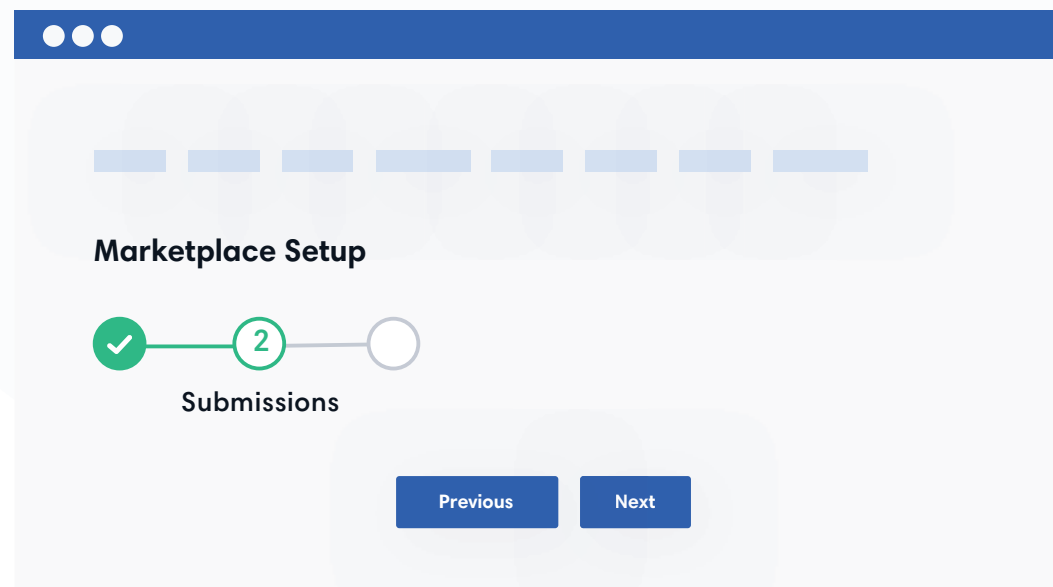
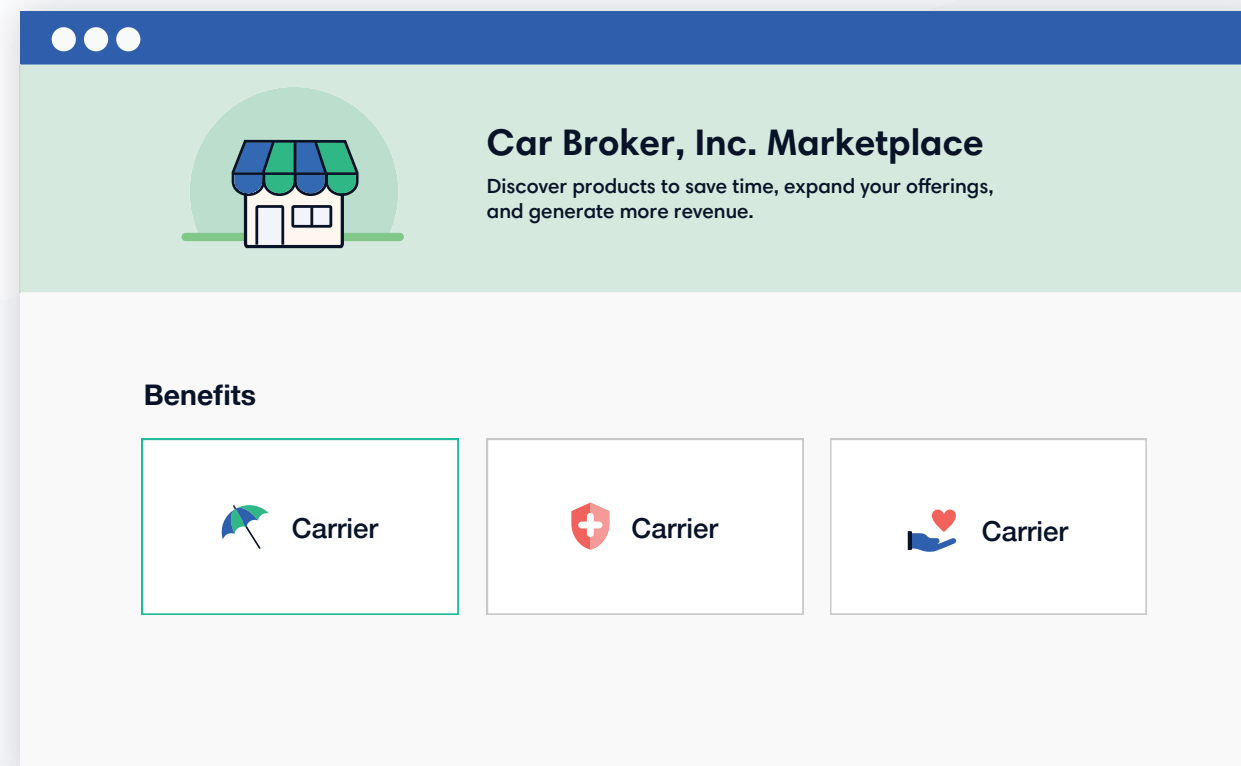
You've already worked with your broker to set up Ease and roll it out to your employees, your staff have logins, and they are familiar with using Ease. This makes it easier to offer your employees and HR team one system for several HR functions. As an added bonus, your broker and their staff are Ease pros and can help you do more.

We recognize that no business is exactly alike and that each may be looking for different resources and solutions, and that is why we have built an all-encompassing Marketplace for all employers. The Ease Marketplace is where you will find the additional tools Ease offers, which give you the ability to create a custom and diverse benefits and HR technology offering. Some of these tools we built ourselves and others are the result of trusted partnerships.



Every feature we discuss in the guide is available in Ease. We recommend starting by checking your Marketplace inside Ease. If you don't see an add-on or partner integration you'd like to learn more about, contact your broker and ask them to make it available in your Marketplace.





Marketplace

It's easy to learn how to use and navigate your Marketplace. When you click enable for any of our Marketplace partners, you will be taken to the Setup Wizard. No matter which partner you're interested in working with, the Setup Wizard will guide you through all of the steps you need to take to get started and start utilizing the partner's plans and resources.

How to get the most from your online enrollment system

In this section, we'll dive deep into how you can begin to go beyond online enrollment and build your company's custom HR and benefits path with Ease. We'll discuss numerous features including how they each work, how to get started, and the advantages they will bring for you and your employees.



Simplify Administration

- Create and Send Offer Letters
- Complete Required Documents for Employees
- Track Time-Off
- Integrate Payroll
- Track Enrollment Progress



Increase Employee Engagement and Happiness

- Identify Benefits Eligibility
- Measure Employee Performance
- Collect Employee Feedback
- HR and Benefits on the Go



Expand Your Benefits Offering

- Telemedicine
- HSAs, HRAs, FSAs



Stay Compliant

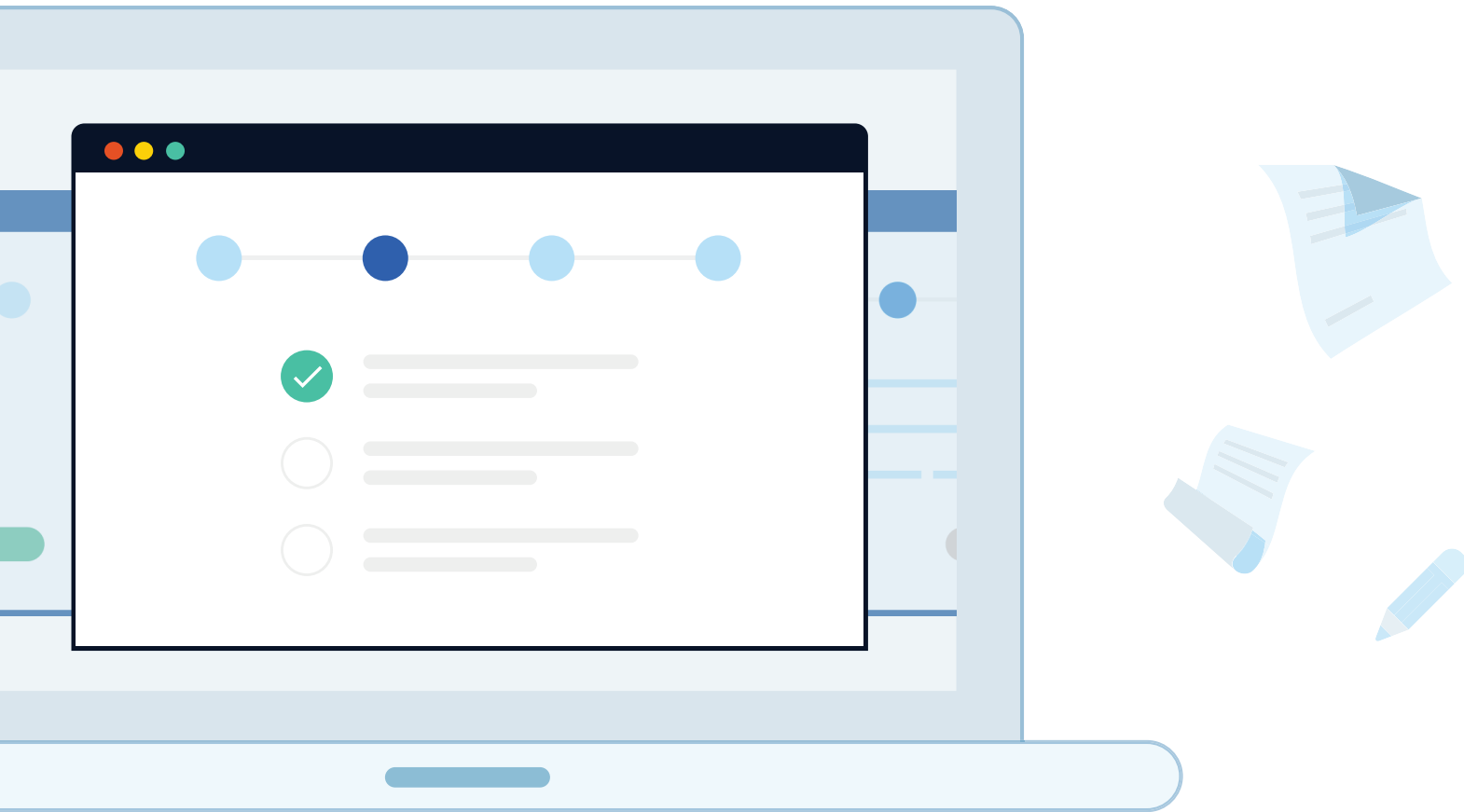
- ACA Reporting and Tracking
- HR Support



Manage Company Growth

- Employee Contact Information
- Company KPI Tracking and Reporting
- Communicate with Employees





Simplify Administration

Simplifying administration is the top reason businesses adopt Ease. It's a theme that applies to the entire Ease system, not just online enrollment.



Creating and Sending Offer Letters

Onboarding & Hiring

There are many moving parts with onboarding and hiring, but with Ease you can bring almost everything online, which will help to reduce errors and speed up the hiring process, similar to online enrollment.



Onboarding & Hiring

Onboarding & Hiring syncs with benefits so employees only have to enter their information once. Create and send offer letters, complete and e-sign W-4 and I-9 forms, and collect direct deposit information.

Extend an offer



Ease gives you the ability to create and send offer letters. First, add the individual in Ease as an employee, but mark their status as applicant. You can then add information that needs to appear in the offer letter, like the hiring date and compensation.

You have a choice to send the offer letter through Ease, or to use a unique URL link generated by Ease to send it through another medium, like email. You can also create offer letter templates with fields that you can change from one letter to another, such as salary, start date, and name.

If the applicant accepts your offer, you won't have to create another employee profile for them again in Ease, whether it's for benefits enrollment, payroll, or HRIS services. Additionally, any changes made in one of these services will flow to the others.

Accept an offer



With the Offer Letter Flow, employees do not have to print out the offer letter, sign it, and send it back, and you don't have to worry about storing the offer letter away in a filing cabinet. Instead, you can securely store hiring information with benefits information in Ease.

The Offer Letter Flow allows employees to electronically sign and accept offers. Once they accept an offer, you can choose to prompt the employee to begin the onboarding process.

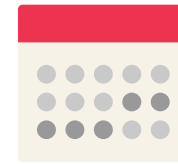


Completing Required Documents

Onboarding & Hiring

You've experienced that a rules-based system is a major time-saver for benefits enrollment. Required Documents with Onboarding & Hiring works the same way.

Ease uses a rules-based system to ensure completed and signed W-4 forms, I-9 forms, and direct deposit information. This means information you're collecting won't be left incomplete. You can also send and upload any onboarding documents required for new hires to review such as company handbooks and conduct code policies. This process eliminates duplicate data entry because the system will use information from Onboarding & Hiring and carry it over to online enrollment.



Tracking Time-Off

HRIS by Ease

Time-Off tracking with HRIS by Ease benefits all parties involved.



HRIS by Ease

We know benefits and HR processes go hand in hand, which is why we've built a powerful HR system. HRIS by Ease includes PTO Tracking, Performance Reviews, Surveys, Company Stats, and a Company Directory.



HR admins and employers

Tracking time-off for multiple employees can be difficult.

Calculating how much PTO they have, how much they've used, and even how much they're allowed to carry over is a lot to keep up with, especially when the process is managed manually, like in an excel spreadsheet.

You can set up your company's PTO policy no matter how complex the policy is. For example, if you have employees who qualify for different amounts of PTO depending on their tenure, job class, or full-time versus part-time status.

You also have access to a time-off calendar that allows you to see all employee time-off requests in a monthly-view. Filter by employee and see the balance of hours each specific employee has remaining in accordance with the company's policy



Employees

Employees can simply request time off by clicking “Time-Off”, which they see as soon as they log in to Ease. Their Time-Off page in Ease includes an dashboard with hours remaining per policy such as PTO, sick leave, and FMLA.

Employees can also subscribe to their team calendar through calendar apps for Outlook, Google/Android, and mac/iOS.

Managers can see all PTO requests by their direct reports in Ease, and easily approve or deny the request.



Integrating Payroll

Ease currently has payroll integrations with ADP Workforce Now, TRAXPayroll, and Paylocity. If you don't work with any of these providers, you can still use our payroll API to integrate with any other provider.

When asked about Ease's payroll integrations, existing users noted the following benefits on the right as their favorites.

- One central, integrated system of record, so all of your HR services are in sync, including benefits, online enrollment, and onboarding.
 - Any benefit changes are automatically communicated to your payroll providers. Changes also can be processed at any time, and in the appropriate pay period.
 - Eliminate duplicate data entry. Depending on the integration, new employees setup with payroll providers will automatically flow to Ease or new employees set up in Ease will automatically flow to the payroll provider.
- With TRAXPayroll, employees can view their paystubs straight
- from their Ease account.

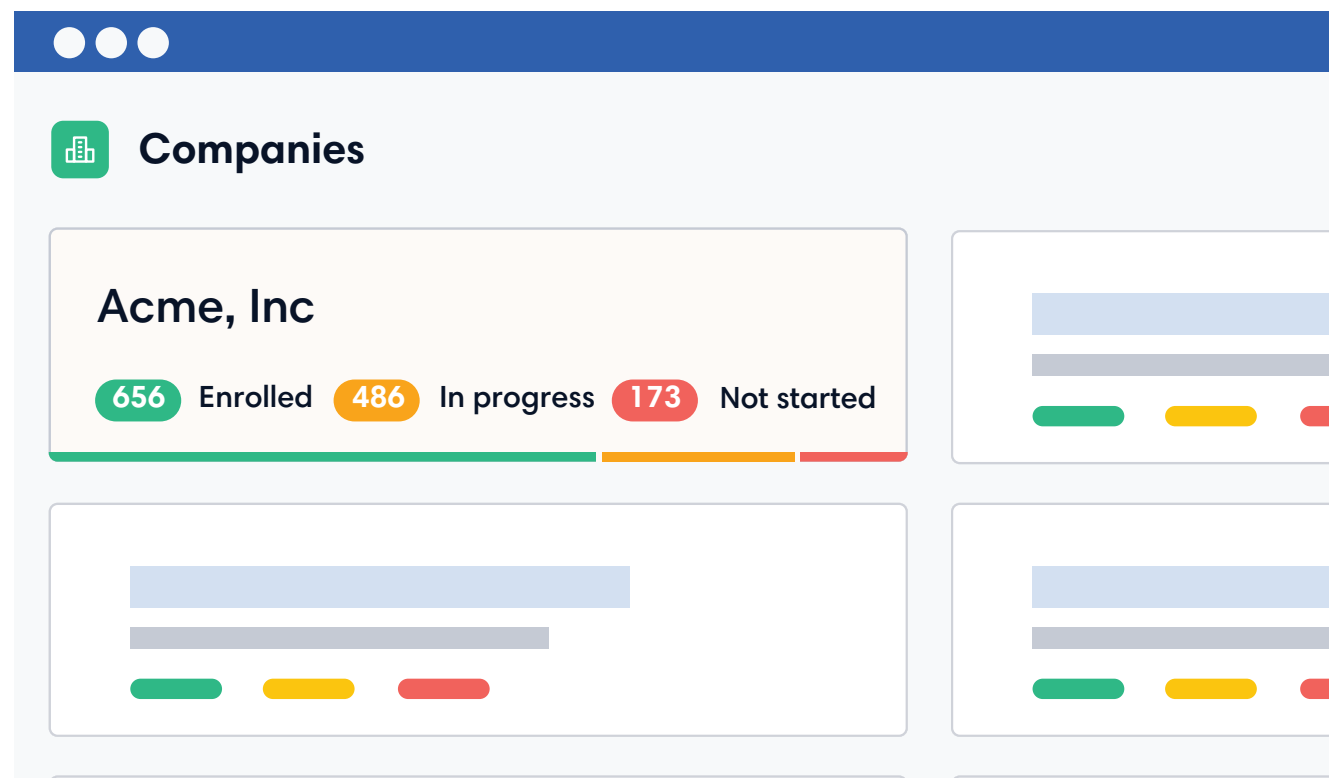




Tracking Enrollment Progress Online Enrollment

We're ecstatic that online enrollment is a core part of your benefits processes. It's why we work hard to build tools to help you take that experience even further.

Queue the enrollment progress dashboard, the perfect way for you to keep track of open enrollment status for all of your employees. View which employees have finished enrollment, are in the process, or yet to begin with an easy to read dashboard.



RESOURCE CENTRAL

- **Onboarding & Hiring Fact Sheet**
- **Online Enrollment & Onboarding Video**
- **ADP Workforce Now Product Document**
- **TRAXPayroll Product Document**
- **Paylocity Product Document**
- **Payroll Fact Sheet**
- **HRIS Fact Sheet**
- **HRIS Overview Brochure**

You can also set up open enrollment details like start and end date for the most accurate status updates. Just remember to ask your broker to “Reset Progress” under the “Actions” button to view progress specifically for the open enrollment time period.



Increase Employee Engagement and Happiness

HR technology isn't just about saving you time, it can also have a significant impact on employee engagement and happiness. Ease can help increase both for your company through identifying benefits eligibility, collecting employee feedback, measuring employee performance, accessing benefits and HR information on the go, and communicating with employees.

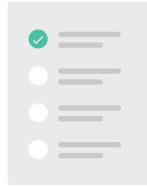


Identifying Benefits Eligibility Onboarding & Hiring

Anthem Gold PPO	Anthem Platinum PPO	Anthem Silver Select HMO
\$214.63	\$252.45	\$214.63

Earlier, we discussed the Offer Letter Flow. What we didn't mention is that when presenting an offer letter, you can communicate all compensation information with the candidate, including benefits. Instead of sending applicants a separate email or document, applicants can access their benefits offering from the offer letter you send them via Ease.

Applicants no longer have to sort through multiple documents or contact several different people to understand what the complete offer is. They are able to view their entire offer package, including both benefits and salary, all at once.



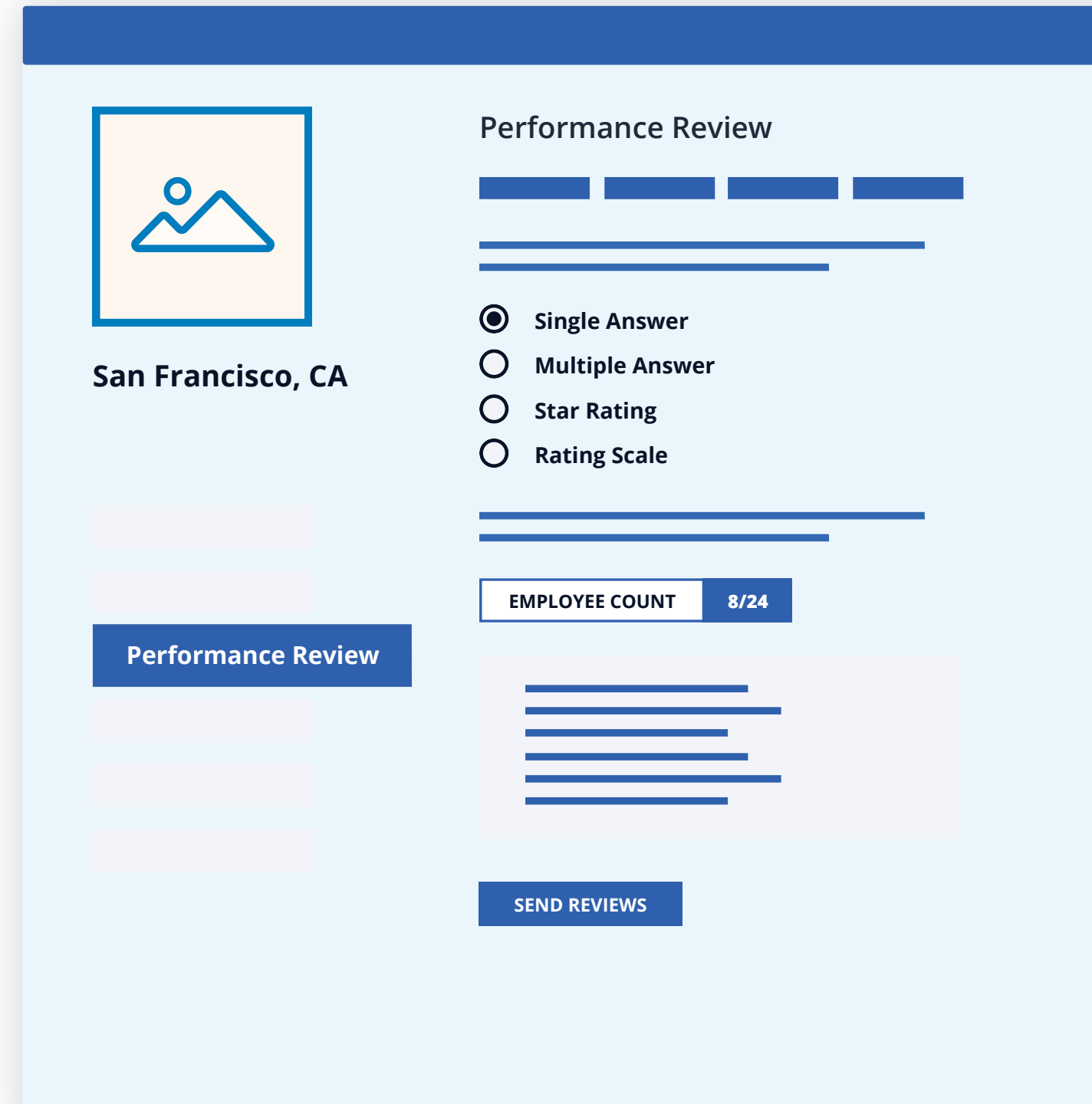
Measuring Employee Performance

HRIS by Ease

If your company already has a review program, our Performance Reviews feature makes it easy to track all the results in one system. If reviews are something you're looking to implement, getting started is easier with Ease.

Performance Reviews allows you to create performance review templates to share with managers in your company. These templates will help create a streamlined performance review process for every member of your staff, no matter what team they are on.

Each performance review is customizable and includes the option to use several question formats including single answer, multiple answer, star ratings, and rating scales. Once the review questions are created, you can send the review through Ease to a specific employee, all managers, or employees in certain organization groups, like company divisions or job titles. Employees will then see a notification in the Ease dashboard when they log in. After the review is complete, managers can view performance review results in Ease.





Collecting Employee Feedback

HRIS by Ease

Engaged employees are 87% less likely to leave their jobs, and surveys are a great tool to increase employee engagement.¹ This is because even though the majority of employees won't tell their manager that they're "unhappy," they will likely display their true feelings in an anonymous survey.

With Ease, you can survey employees about anything, any time of the year. Learn whether they're happy with the snacks in the office, what t-shirt size they need for a tradeshow, or what benefits they'd like to see in the future. You can use the survey feature to take a quick poll too, like where to have your company holiday party.

This is how it works in Ease:

1. Create the survey and determine a due date in Ease.
2. When you're ready to send the survey, Ease will prompt you to add a custom message for employees.
The message will automatically generate a unique URL link for each employee.
3. An employee will receive an email asking them to log in and complete the survey.
4. Once they login and click on the Surveys icon, all survey questions will display. They will have until the due date to submit responses.
5. You'll then be able to view answers to your survey per employee. Details and statistics from the combined response of all employees can also be viewed in formats like pie charts and bar graphs in Ease or exported into a spreadsheet.

The screenshot displays a user interface for creating a survey. On the left, there is a placeholder for a profile picture and the text "San Francisco, CA" below it. A blue "Survey" button is positioned at the bottom left. On the right, a "Survey Preview" section shows a progress bar at the top, followed by a question with two radio button options: "Yes" and "No". Below this is a 10-point scale with numbers 1 through 10. At the bottom right, there is a large, empty rectangular box for additional content or a message.



HR & Benefits on the Go

The Ease iOS mobile app gives employees 24/7 access to some of their most important HR and benefits information.

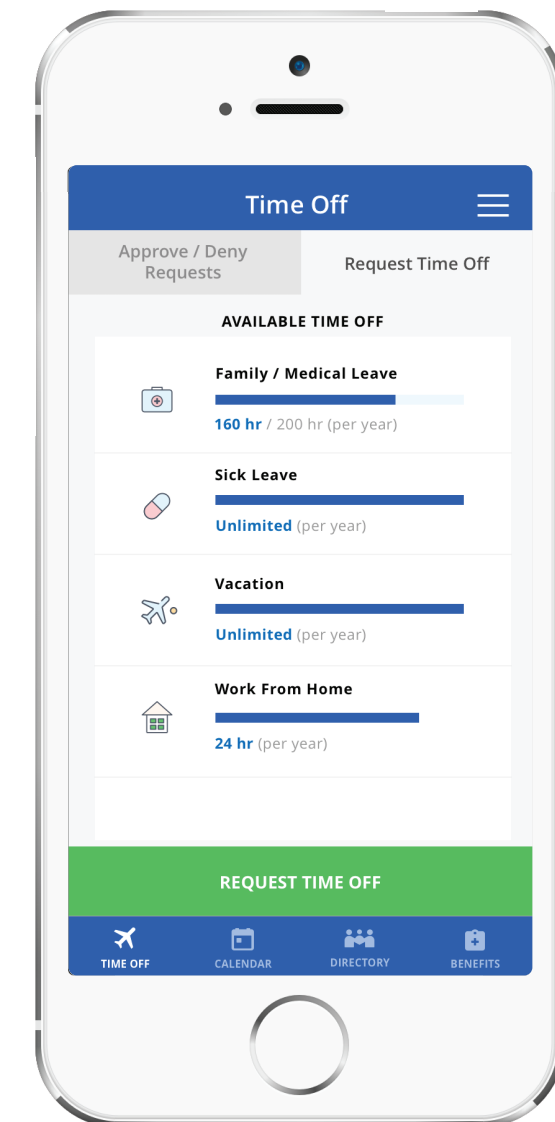
- ✓ Benefits anywhere, at any time: Sometimes, life is unpredictable and we don't always know when we'll need to visit the doctor. Our mobile app allows employees to securely review a quick summary of their benefits, read plan information, and access policy numbers from any location.
- ✓ Time-off: For HRIS by Ease users, employees can review their available time off, request time-off, and access a full calendar view that includes upcoming time-off and national holidays. Managers can even approve time-off on the go.
- ✓ Directory: Also for HRIS by Ease users, employees can connect with coworkers from anywhere with access to colleagues' profiles, email addresses, and phone numbers.

The Ease iOS mobile app is available in the App Store.



RESOURCE CENTRAL

- **Ease iOS Mobile App Flyer**
- **HR with Ease Webinar**





Expand Your Benefits Offering

Employees are increasingly looking for benefits outside the scope of an annual visit to their primary care physician. They want benefit options that will provide them and their dependents with safety and security, no matter the time or location. In fact, 78% of employees want a greater variety of benefits to choose from and 80% would value benefits customized to individual circumstances and age.²

With Ease, you have access to a large, diverse library of services and integrations that make it easy to expand your benefit offering, and customize it to your employees' needs. You and your company can choose from both employer-sponsored and entirely voluntary health benefits. These options allow you to work with your broker to create a well-balanced benefit package that suits both you and your employees

We have several partners in the Marketplace that you can use to tailor your benefits offering.





Telemedicine

Did you know that U.S. employers could save up to **\$6 billion** per year by providing telemedicine technologies to their employees? ³ As one of the fastest growing types of benefit in the United States, telemedicine helps companies increase employee productivity, reduce healthcare spending, recruit new employees, and boost company morale.

There are currently four telemedicine providers in the Marketplace:

- **MDLive**
- **Plushcare**
- **freshbenies**
- **Alliance Direct Benefits**



Each of these telemedicine providers offer plans that save time and money for entire families. They offer utilization tools such as marketing materials and events, which are often overlooked by traditional medical carriers who offer telemedicine. These utilization tools are key to helping you talk to your employees about optimizing telemedicine coverage.



HSAs, HRAs, FSAs

Offering plans like health savings accounts (HSA), health reimbursement accounts (HRAs), and flexible spending accounts (FSA) give employees an opportunity to prepare for future health care expenses. These deductible-based health plans encourage employees to become more involved in their own health care decisions by giving them more control over how and when they spend their healthcare dollars.

These types of plans are currently accessible in the Ease Marketplace thanks to partnerships with:



And because a lot these plans are entirely voluntary, they can decrease tax burdens and eliminate the need to manually file claims.

We also have partners you can work with to offer services like COBRA, loan repayment programs, prescription savings, legal counsel, scholarship programs, and roadside emergency assistance. You can even find tools like Amino, which helps employees research healthcare providers and prices before they make an appointment.

For more information on these Marketplace partners, or any others, just visit the Marketplace and click on the service you'd like to learn about. There, you can read short descriptions, access marketing materials, and find contact information to learn more before you get started.



RESOURCE CENTRAL

- **Happy Employees Have Telemedicine**
- **Marketplace Webpage**

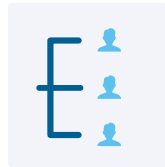


Manage Company Growth

You know better than anyone that companies change all the time. There are often spurts of growth, times of restructuring, and periods of evaluation. Keeping up with all of this can seem impossible.

Fortunately for you, HRIS by Ease has a few features that will help you and your employees stay organized and on track, even when everything else around you is spinning too fast.



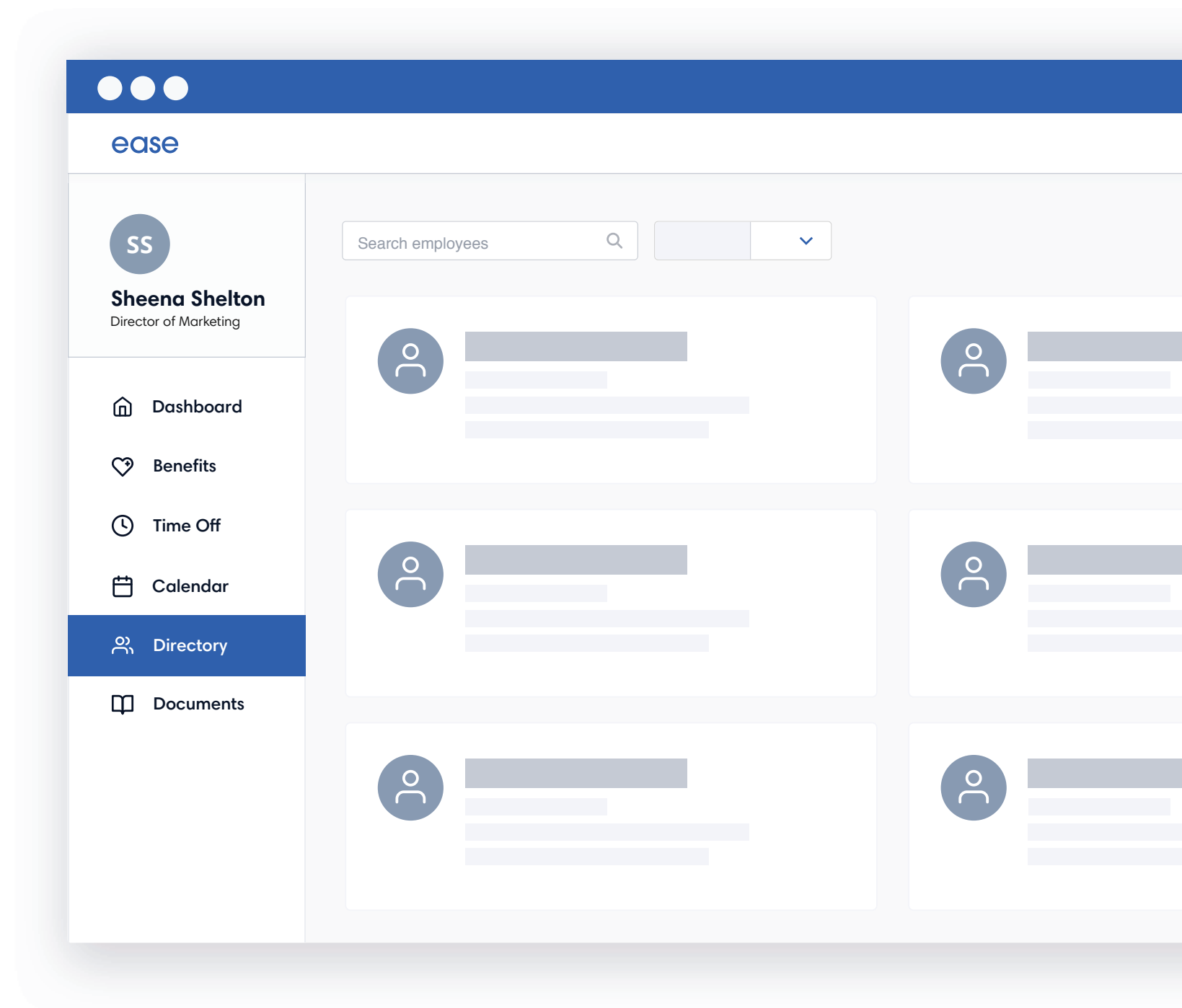


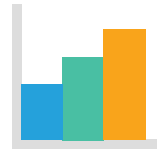
Employee Contact Information

HRIS by Ease

You and your employees can access one complete directory for employee contact information, including full name, email address, and phone number all in Ease. Contact information is searchable by name, locations, and department.

Additionally, our Events feature allows you to see a quick view of employee events such as birthdays and work anniversaries within 28 days from the current date.



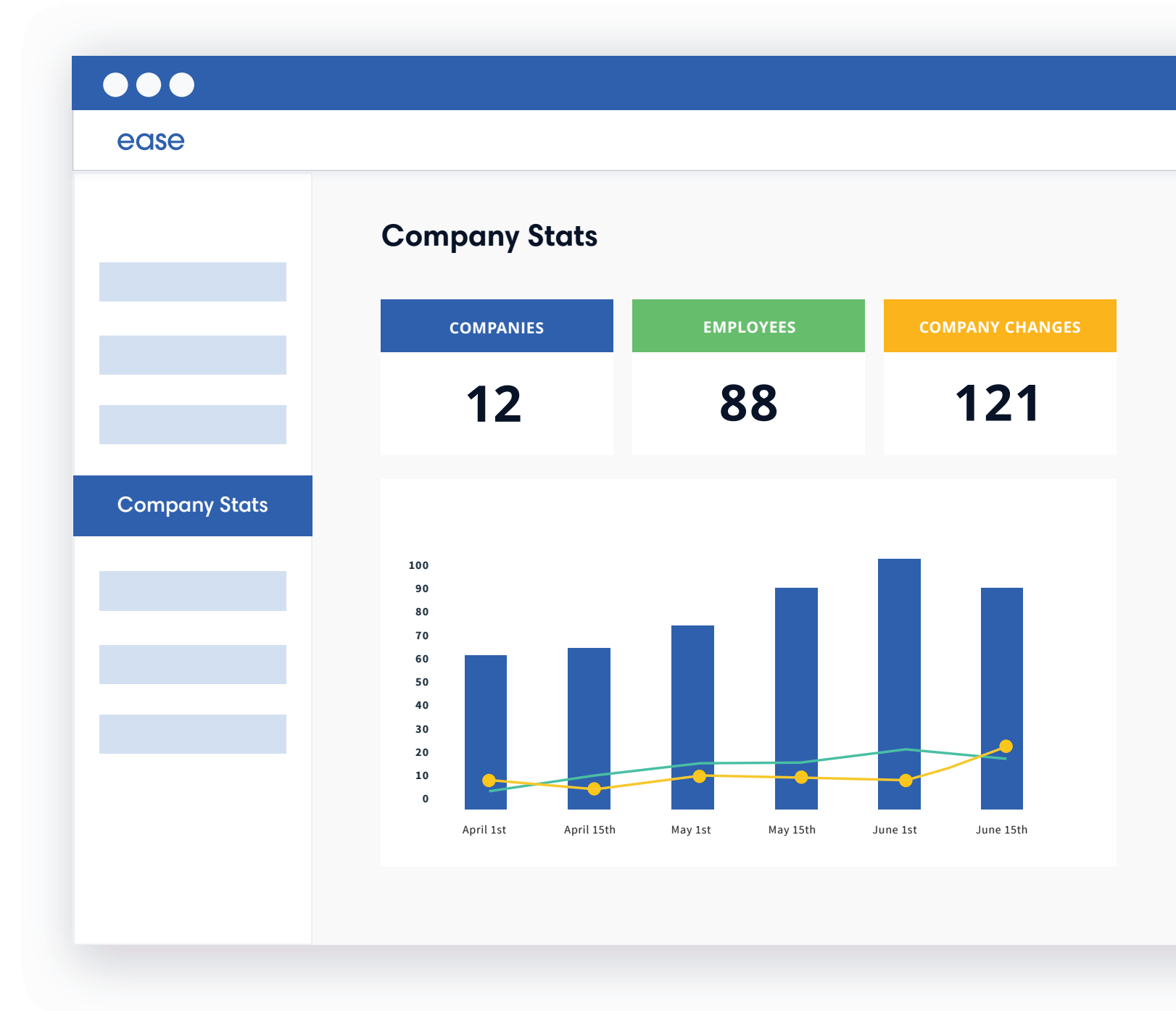


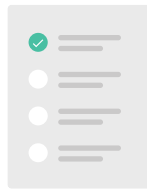
Company KPI Tracking and Reporting

HRIS by Ease

Company Stats can help you and your company's leadership make better informed decisions. Access a suite of visualized HR data, including employee growth, company diversity, and more.

Many of the employers already using this feature find the the visualized data organization structure extremely useful, especially when presenting how teams and divisions are structured.





Communicating with Employees

Online Enrollment

Communicating the right benefits information, following strict timelines, and staying in touch with employees throughout open enrollment can be very time-consuming, especially when dealing with multiple employees.

That's why we're recommending that you take full advantage of Ease's Employee Communication tool. This tool automatically recognizes where employees are in the enrollment process, and allows you to email them directly from the system at any time during the open enrollment period. You can use the tool to remind employees about matters that impact open enrollment like upcoming deadlines or new benefit options.



RESOURCE CENTRAL

- **How to use the Company Directory**
- **How to use Company Stats**

Message Employees

To: Not Started In Progress

From:

Hello, {name}

We wanted to inform you that you have yet to complete enrollment in your company's ...

Here's how it works:

1. Enter an employee's email address or filter by enrollment progress status.
2. Add your custom message.
3. Click Send.

Each message even includes the appropriate login URL link for each employee. It's that easy. Never lose track of where your employees are in the enrollment process again.



Stay Compliant

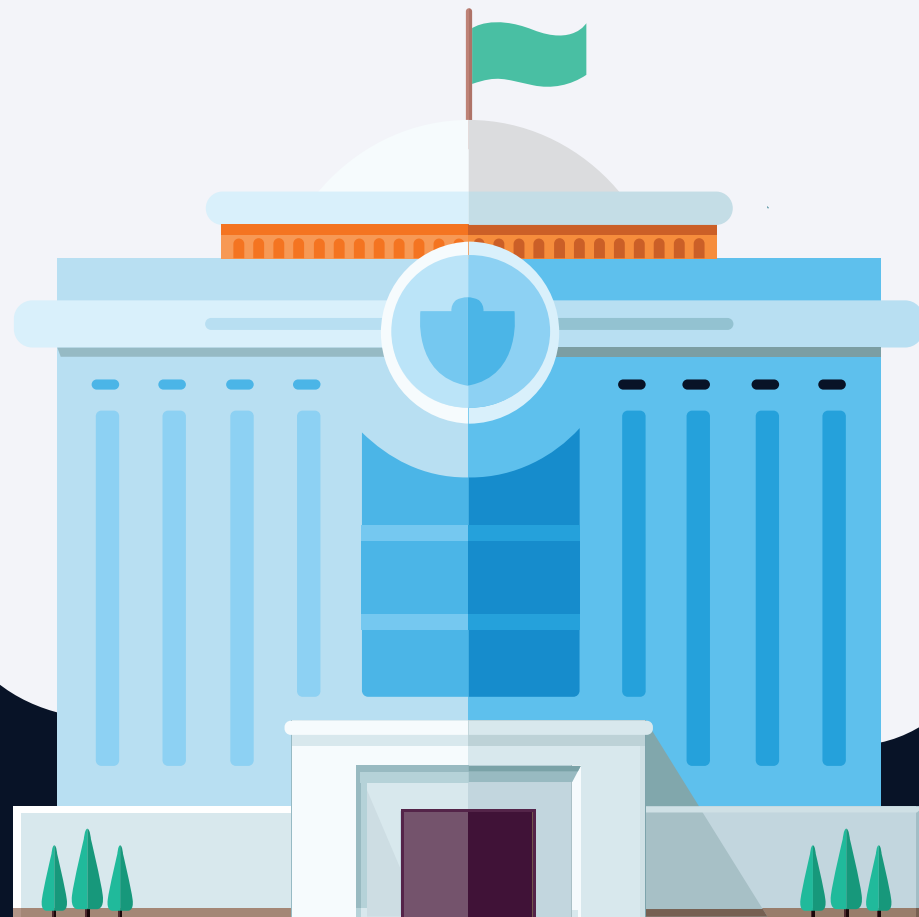
Today, staying compliant can be difficult, especially when dealing with fast changing government regulations, laws, and even penalties. We offer you the compliance support you need.



ACA Reporting and Tracking

ACA with Ease is a robust solution for electronic tracking and reporting that helps you stay compliant and avoid penalties. And, since most of your employee data is already in Ease, the process is easier than if you were doing it with a party that had no history of your employee data.

The ACA module, included in your broker's Ease subscription, has everything you need for ACA compliance.





ALE Calculation

Ease's Applicable Large Employer (ALE) calculation informs whether you have to participate in 1094/1095 ACA reporting.



Track Current & Historical Employee Data

Import employee hours worked as well as current and historic demographics and benefits data using Ease-built templates. Eligibility for variable hour workers can be tracked and measured monthly, or by implementing look-back measurement and stability periods.



Measure Affordability, Avoid Penalties

We offer three options to measure if your coverage meets affordability standards, using the plan data you already have in Ease: W-2, Rate of Pay, and the Federal Poverty Line. You can also see if your coverage met the ACA's Minimum Essential Coverage standard.



IRS ready 1094 and 1095 Forms

For an additional fee, you can download completed, signature-ready 1094-B/1094-C and 1095-B/1095-C Forms for your employees and the IRS. We also have partnerships with third parties that can help you electronically submit the forms.



HR Support

We already talked about ACA Compliance, but with ever-changing federal rules and regulations, it's important for you and your team to have resources to keep up with policies like FMLA. At the very least, a resource you can turn to when you have time-sensitive questions about handling HR issues.

Our partnership with HRAnswerLink offers you access to two different services that provide resources to turn to in the instance of complicated situations such as an employee showing up to work intoxicated or an employee violating a time-off policy. The two different services, HR Support Center and HR On-Demand are available in your Marketplace. Both services offer critical HR tools, like an employee handbook, job descriptions, new hire documents, and employee relations solutions.

Those with HR On-Demand will also receive access to unlimited, live HR consulting to help you manage compliance and employee relations issues no matter the time, situation, or location.



RESOURCE CENTRAL

- **ACA for Employers Flyer**
- **ACA with Ease Video**
- **HR Support Center and HR On-Demand**

Conclusion

Now you know exactly how to work with us and your broker to build the year-round benefits and HR program your company deserves.

The tools and services mentioned in this guide like time-off tracking, employee communications, and HR support were all designed to help you simplify administration, increase employee engagement and happiness, expand your benefits offering, manage company growth, and stay compliant. No matter which path or paths you choose, we are certain that you have the technology to make it easy to build a diverse and customized benefits and HR program.

If you have any questions about how to get started with one of the features mentioned in this guide, please don't hesitate to contact us.

If you have any questions about how to get started with one of the features mentioned in this guide, please contact your broker.



References

¹ <https://www.tinypulse.com/blog/the-pros-and-cons-of-employee-feedback-surveys>

² <https://www.zanebenefits.com/blog/the-most-important-benefits-to-employees>

³ <https://www.fiercehealthcare.com/it/telemedicine-could-save-us-employers-6-billion-annually>

ease



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INSURANCE SERVICES
AN **ALERA GROUP** COMPANY

Thank you!

www.ease.com