

Benefits Advisor

CLIENT TRANSITION JOURNEY

ABOUT THIS GUIDE

Your organization will be fully transitioning to Benefits Advisor, Paycor's new benefits enrollment and administration technology platform. Benefits Advisor will offer your organization immediate and long-term wins. But first, you need to transition to the new system. Please know, Paycor is committed to making the transition process as easy and convenient for you as possible, however, your participation is critical to the success.

To ensure your readiness and prevent any interruptions of service, this guide outlines communications, tools and instructions that will guide you step by step through the process. In fact, Customers with the highest level of satisfaction with the transition relied on the Client Transition Journey to keep them on pace and informed. We hope you find this to be a valuable tool as well.

Thank you for your continued trust in us. For questions or concerns, please contact BenefitsTransitionTeam@paycor.com.

TRANSITION CHECKLIST

90-100 Days Prior to Transition

- Review Benefits Advisor Client Microsite
- !!** Attend kickoff call with Transition Consultant (Duration: 30 mins)
- !!** Review benefit class matrix and assign employees to appropriate benefit class
- Audit employees for dependent accuracy Review and update missing/invalid demographic information (if applicable)

60 Days Prior to Transition

- View Benefits Advisor: Full Product Overview (Duration: 10 mins)
- View Benefits Advisor: Navigation (Duration: 10 mins)
- Begin adding Benefits Advisor Classification for all New Hires

45 Days Prior to Transition

- !!** Attend a call with transition consultant and receive your user credentials (Duration: 1 hour)
- !!** Complete new hire testing in Benefits Advisor and audit plan information

30 Days Prior to Transition

- !!** Provide sign off on database configuration
- Complete Benefits Advisor: Plan Selection webinar (Duration: 4 mins)

21 Days Prior to Transition

- Complete Benefits Advisor: Special Enrollment webinar (Duration: 5 mins)
- Complete Benefits Advisor: Uploading Documents to and Managing the Library webinar (Duration: 5 mins)
- Close any open enrollment events, including new hire events, in Perform Benefits (if applicable)
- Begin making enrollment changes for new hires or life events in both Perform Benefits and Benefits Advisor

14 Days Prior to Transition

- !!** Review and update missing/invalid demographic information (if applicable)
- !!** Review and provide feedback on any EDI discrepancies (EDI clients only)
- Send email to employees notifying them of the change to Benefits Advisor

Go Live

- !!** Complete Go Live call with Transition Consultant (Duration: 30 mins)
- Review FAQs and Benefits Advisor help resources

90-100 DAYS PRIOR TO TRANSITION

REVIEW BENEFITS ADVISOR MICROSITE

Everything you need to get your started on your Benefits Advisor Transition, can be found on our [microsite](#). Here you can find product information, helpful videos and webinars, training materials, FAQs and more.

ATTEND KICKOFF CALL WITH TRANSITION CONSULTANT

!! Duration: 30 mins

In order to make your transition as seamless as possible, we have assigned a dedicated Transition Consultant who will guide you throughout the entire process. You'll receive an email to schedule a kickoff call with your Transition Consultant about 100 days prior to your transition.

During that call, your Transition Consultant will work with you on the date for your transition. Paycor highly recommends allowing 30 days prior to your Open Enrollment launch, so that you can prepare and review your plans. We recommend this even if you have minimum changes. We also suggest with this first Open Enrollment on the new platform be an active enrollment to allow employees to view coverage and update any additional missing information.

Additionally during this call your consultant will provide all the details needed for organizational readiness. If you have questions prior to this call or haven't received a communication from your Transition Consultant, please email BenefitsTransitionTeam@paycor.com or call us at 855.551.2032.

Want to meet the team? Check out our [quick video](#).

REVIEW BENEFIT CLASS MATRIX AND ASSIGN EMPLOYEES TO APPROPRIATE BENEFIT CLASS

Benefits Advisor is a modern rules-based tool that unlike Perform Benefits, determines eligibility by using Benefit Classifications. Benefits Classes are rules that influence how benefits are distributed. Factors include, rates (including employee and employer contribution), eligibility waiting period and offered plans.

To ensure you have a smooth transition it is critical that we review and get sign off on the Benefit Class Mapping for your employees. Here are the steps to Benefit Class Mapping.

Step 1: Review and Approve Benefit Class Matrix

Your assigned associate will start by analyzing your current plans and eligibility in Perform Benefits then map this data into Benefits Advisor by creating a Benefit Class Matrix. Your role will be to review and validate the Benefit Class Matrix to ensure accuracy. You will receive the Benefit Class Matrix prior to your kickoff call.

Step 2: Assign employees to appropriate benefit class

Once the Benefit Class Matrix has been validated and approved, you will need to assign your employees to the correct Benefit Class. Your Transition Consultant will send you a report that will need to be completed so that your employees have the correct benefits offered to them.

In order to stay on track, and ensure there are no interruptions of service, you are required to review and provide feedback on the Benefit Class Matrix. This information will be used to setup benefits in the new system. The details of this will be addressed by your dedicated Transition Consultant on your upcoming kick-off call.

AUDIT EMPLOYEES FOR DEPENDENT ACCURACY

Dependent information will need to be added to Benefits Advisor to ensure employees are offered the correct plans. You will need to perform an audit of your employees and add any missing dependent information for employees that are in a plan other than single.

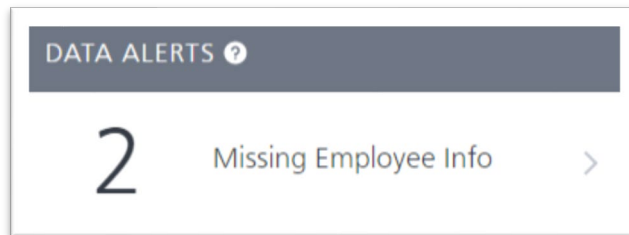
Below are the steps for Managing Dependents.

1. Select Employees > Manage Employees.
2. Select the employee record you wish to view.
3. From the Company menu, select Benefit Elections. All current benefit types for the employee will display
4. Clicking “Manage Dependents” will take you to the Family Information page where you may edit or add dependents.
5. If you click “Add Dependent Coverage” you may add a dependent if they are already on your Family Information page.

REVIEW AND UPDATE MISSING/INVALID DEMOGRAPHIC INFORMATION (IF APPLICABLE)

In Perform within each employees' profile, enter any missing data for SSN, DOB, and gender as these are required fields within Benefits Advisor. Benefits Advisor is a rules-based system and can calculate elections based on age, gender, etc. Even if your company does not use this information it is required to be in Benefits Advisor.

You can see which employees have missing information by navigating to your dashboard and reviewing the data alerts. You can click into the errors to update the missing information.



60 DAYS PRIOR TO TRANSITION

VIEW BENEFITS ADVISOR: FULL PRODUCT OVERVIEW

Duration: 10 mins

Review the [Benefits Advisor: Full Product Overview](#) video which walks you through the new system and prepares you for completing upcoming actions. It is approximately 12 minutes in length.

VIEW BENEFITS ADVISOR: NAVIGATION

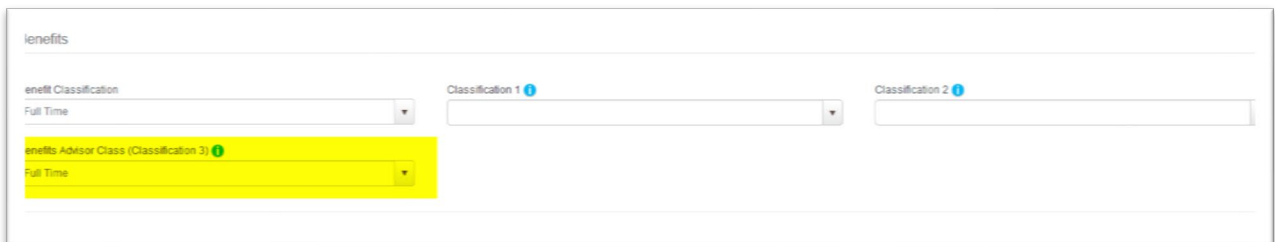
Duration: 10 mins

Review the [Benefits Advisor: Navigation](#) video which demonstrates how to navigate within Benefits Advisor. It is approximately 5 minutes in length.

BEGIN ADDING BENEFITS ADVISOR CLASSIFICATION FOR ALL NEW HIRES

While your Transition Consultant is configuring Benefits Advisor, please ensure all new hires are assigned a Benefit Class so there are no errors when moving to the new system.

In order to assign a Benefit Class, populate the “Benefit Advisor Class (Classification 3)” field in the New Hire Wizard for each new employee. It is marked required in the New Hire Wizard and located within the employee profile under the position tab. You will use one of the classifications you approved during the Benefit Classification Matrix Call. If the classification type you want to enter is not available please reach out to your Transition Consultant for assistance.



The screenshot shows a web form titled "Benefits" with several dropdown menus. The first dropdown is labeled "Benefit Classification" and has "Full Time" selected. To its right are two more dropdowns labeled "Classification 1" and "Classification 2", both with empty text boxes. Below these is a dropdown labeled "Benefits Advisor Class (Classification 3)" which is highlighted in yellow and has "Full Time" selected. Each dropdown menu has a small blue information icon to its right.

45 DAYS PRIOR TO TRANSITION

ATTEND A CALL WITH TRANSITION CONSULTANT AND RECEIVE YOUR USER CREDENTIALS

!! Duration: 1 hour

To ensure organizational readiness for the Benefits Advisor transition, Paycor has provided full demo access to you and your team along with instructions to test and complete the full New Hire experience. During the call with your Transition Consultant, they will walk you through the experience and expectations.

COMPLETE NEW HIRE TESTING IN BENEFITS ADVISOR AND AUDIT PLAN INFORMATION

!! Critical Task

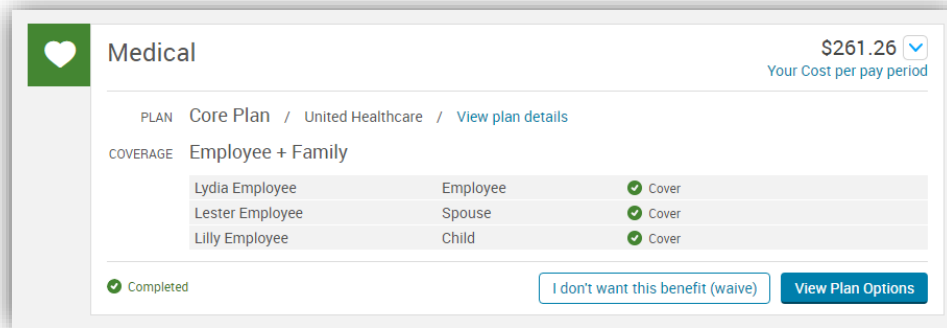
Benefits Advisor is both far more powerful and easier to use than Perform Benefits and while we mirror your current Perform Benefits set-up, these new feature enhancements will require an audit of the configuration to ensure a smooth transition.

The audit will consist of two activities, New Hire Testing and Audit of Plan Information. Here's how you can get started.

Activity 1: New Hire Testing

1. Log into Benefits Advisor
2. Select Start Your Enrollment
3. Verify Your Information: including address, dob, etc.
4. Verify Your Family Information and add all dependents. When all your family information has been entered click Continue.
 - a. To add dependents:
 - i. Click the Add Dependents card.
 - ii. Click the Edit link on the dependent's name and make the corrections or additions.

5. Select a plan by clicking View Plan Options.



**When auto-enrolled or employer-paid plans without a waive option are offered, they'll appear in their own pod.*

6. Enroll in a Plan

Please note:

- The Plan Brochure link, if available, will download the summary of benefits and the View Plan Details shows more details.
- Life Insurance: If you elect more than the Guaranteed Coverage amount you will be presented with a message notifying the employee that they will need to complete an evidence of insurability form.
- Beneficiaries: Your Totals for each plan must equal 100% in order to continue.

Activity 2: Review and Audit Plan Information

1. Navigate to Admin -> Benefit Admin -> Benefit Plans
2. Confirm accuracy of the below:
 - a. Plan Name
 - b. Effective/Expiration Date (for plans that require a new enrollment each year (e.g. FSA,) the effective/Expiration Date should be the plan year dates. For plans that do not require a new enrollment each year, we suggest 01/01/1901 thru 12/31/9999)

- c. Vendor (carrier name)
- d. Deduction information under Additional Coding-confirm that the deduction code matches what is currently being used in Payroll for employee Deductions. For Employer deductions review Group/Suffix

1

Additional Coding

- Plan Number
- Drug Search Number
- Other Plan Number
- COBRA Plan Number
- Rx Plan Number
- Policy Number
- Discount Eligible
- Deduction Code 1
- Deduction Code 2
- Deduction Code 3
- Deduction Code 4
- Deduction Code 5
- Deduction Code 6
- Deduction Code 7
- Deduction Code 8
- Deduction Code 9
- Deduction Code 10
- Group/Suffix 1

3. Click Plan Rules on the right navigation bar. Review the below fields under enrollment rules to verify accuracy

Benefit Plan Rules

Plan Name: HMO

Enrollment Rules

- * Enrollment Type:
- Waive Contingency: Available for enrollment only when the above benefit type is waived
- Qualified Plans: Employee eligibility contingent upon the enrollment in the above benefit type
- Waive Plan:
- Hide Plan if Contingency Isn't Met:
- Exclude from Benefit Calculator:
- Pend Enrollment Until End Of Window: Option to pend enrollment dates until end of enrollment, when they will be automatically approved.

Enrollment Lock Rules

- Period Rule:
- X =
- Lock Coverage Choices:

Payroll & Billing Information

**For Life, AD&D, Critical Illness Plans, STD and LTD review Coverage Option, Calculate Rate Per Unit, Calculate Rates On, Factors, Minimum Amounts and Maximum Amount Fields*

4. Click Eligibility Rules on the right navigation bar. Review the below field to verify accuracy

Eligibility Rules

Employee Minimum Age

Employee Maximum Age

* Dependent Child Minimum Age

* Dependent Child Maximum Age

* Full-Time Student Maximum Age

Disability Overrides Age Rules

5. Review Plan Rates/Costs: To Review click on Benefit Administration -> Benefit Class – Assign Cost -> Benefit Class Name. Except for Life AD&D, Disability and FSA plan types Rates and costs are stored at the benefit class level.

Once you have chosen the benefit class you want to review click choose the plan name from the drop-down list.

Contribution Maintenance

Class Name: FULL-TIME SALARY

Plan Name: Choice HMO (Choice HMO)

Displaying tier costs effective: 01/01/2014

[Add new tier costs >>](#)
[Copy tier costs to Benefit Classes >>](#)

* Fields are required

* Tier

* Employee Cost

* Employer Cost

Net COBRA Cost

| Tier | Employee Cost | Employer Cost | Total Cost | Net COBRA Cost |
|--|---------------|---------------|------------|----------------|
| <input type="checkbox"/> Employee | \$40.00 | \$200.00 | \$240.00 | \$0.00 |
| <input type="checkbox"/> Employee + Spouse | \$65.00 | \$225.00 | \$290.00 | \$0.00 |
| <input type="checkbox"/> Employee + Family | \$80.00 | \$275.00 | \$355.00 | \$0.00 |

Amounts and Costs

Effective Date:

[Update Amounts and Costs for Users >>](#)

**If your plan has rate bands, you would choose Assign Rates rather than Assign Costs.*

The information you are testing reflects your organizations new system set-up. If we do not complete the testing, we will assume the information is correct and it will be published into Benefits Advisor. All changes will then be the responsibility of you and your organization to address.

30 DAYS PRIOR TO TRANSITION

PROVIDE APPROVAL ON DATABASE CONFIGURATION

!! Critical Task

Once you've completed the new hire test and audited the plan data, any feedback or changes need to be sent to your Transition Consultant. After the changes are made, you will need to review and approve the site setup. If there are no changes, you will need to send approval of your site setup to your Transition Consultant via email after completing the testing.

This step is required in order to load elections and dependents into Benefits Advisor. Customer sign-off is required on the database configuration. If we do not receive customer sign-off in a timely manner, we will assume the information is correct and it will be published into Benefits Advisor. All changes will then be the responsibility of you and your organization to address.

COMPLETE BENEFITS ADVISOR: PLAN SELECTION WEBINAR

Duration: 4 mins

Review the [Benefits Advisor: Plan Selection](#) video to provide information on how to correct employee's benefit selections to ensure you are prepared for your transition to Benefits Advisor. It is approximately 4 minutes in length.

21 DAYS PRIOR TO TRANSITION

COMPLETE BENEFITS ADVISOR: SPECIAL ENROLLMENT WEBINAR

Duration: 5 mins

Review the [Benefits Advisor: Special Enrollment](#) video for information on creating an open enrollment event for individuals under exception circumstances and steps on how to perform the action. It is approximately 5 minutes in length.

COMPLETE BENEFITS ADVISOR: UPLOADING DOCUMENTS TO AND MANAGING THE LIBRARY WEBINAR

Duration: 5 mins

Review the [Benefits Advisor: Uploading Documents to and Managing the Library](#) video for direction on how to upload and manage content using the library. It is approximately 5 minutes in length.

CLOSE ANY OPEN ENROLLMENT EVENTS, INCLUDING NEW HIRE EVENTS, IN PERFORM BENEFITS

Paycor will be extracting your employees' enrollment information and if there is an open enrollment in progress, this will cause your employees' data to not be converted to the Benefit Advisor system.

If new hires need elections, then you will need to manually add these into Perform by:

1. Select Employees > Manage Employees. Select the employee record you wish to view.
2. From the Company menu, select Benefit Elections.
3. All current benefit types for the employee will display. Click Add New Coverage.
4. Input necessary information for the new coverage (Plan, Reason for Change, Coverage Level, etc.). The fields available will depend on the plan configuration.
5. Click Save.

BEGIN MAKING ENROLLMENT CHANGES FOR NEW HIRES OR LIFE EVENTS IN BOTH PERFORM BENEFITS AND BENEFITS ADVISOR

Doing this will keep the databases in sync and the employee enrollment information current. If your company has an EDI connection, this will help keep it on track to be moved into Production for the Benefit Advisor platform. Please reference [Benefits Advisor: Plan Selection](#) on how to make changes in Benefit Advisor.

14 DAYS PRIOR TO TRANSITION

REVIEW AND UPDATE MISSING/INVALID DEMOGRAPHIC INFORMATION IF APPLICABLE WITHIN THE EMPLOYEES' PROFILES.

!! Critical Task

Reference detail provided under [90 -100 day section](#)

REVIEW AND PROVIDE FEEDBACK ON ANY EDI DISCREPANCIES.

!! Critical Task

As we relocate your EDI connections into Benefit Advisor, the carriers will provide discrepancies if any data for the employees is out of sync between the carrier's site and Paycor's database. Any discrepancies found need to be addressed as soon as possible otherwise it could cause delays with the production on your file.

It is critically important that you review and update any missing or invalid demographic information or EDI discrepancies in a timely manner. Failure to provide feedback could result in the information being published in Benefit Advisor incorrectly. All changes would then be the responsibility of you and your organization to address.

SEND EMAIL TO EMPLOYEES NOTIFYING THEM OF THE CHANGE TO BENEFITS ADVISOR

Below is an email template that can be used to prepare your employees for the Go Live of Benefits Advisor. The template can also be download from our [microsite](#).

Subject Line: Exciting Benefits Announcement

Body Copy: I'm excited to inform you that Paycor, our HR & Payroll partner, is offering an amazing new benefits platform that will make choosing and managing your benefits easier than ever. Benefits Advisor is the industry-leading benefits administration solution, and I'm confident you will enjoy the ease of use and convenience of the new platform.

Here are the advantages you can expect:

- Update and change benefits information quickly and easily with employee self-service
- Manage, shop and enroll in benefits via Paycor's mobile app, anywhere, anytime
- Experience a simpler open enrollment process

I encourage you to read through the [training guide](#) to get the most out of Benefits Advisor. As always, if you have any questions or feedback, please contact me at XXXX.

GO LIVE

COMPLETE GO LIVE CALL WITH TRANSITION CONSULTANT

!! Duration: 30 mins

Your Transition Consultant will schedule a Go Live call with you on the day of your transition. On this call your Transition Consultant will work with you to:

- Confirm that SSO is working correctly
- Explain the different roles (Employee vs. Manager) and how to navigate between them
- Set up preferences for Alerts Email
- Review the Landing Page
- Walk through any benefit changes that have not yet been added to Benefits Advisor.
- Review the Reports section and highlight a few of the more useful reports.
- Review any questions or concerns that might arise from training.
- Review how to pull perform benefit history

REVIEW FAQs AND BENEFITS ADVISOR HELP RESOURCES

We know there's a lot to take in, so we've built a full library of learning resources to help as you get used to Benefits Advisor. See the [Resources & Training](#) section for more information.

As a reminder, below are the standard timelines for any plan and benefits changes where Paycor needs to be involved in the configuration or change:

- Single Plan/Rate changes: 7 to 10 business days
- Multiple Plans/Rate changes: 4 weeks
- Building Open Enrollment (plan information needs to be updated): 60 days prior to Renewal Date
- Launching Open Enrollment: 30 days prior to launch of the Open Enrollment
- Changes to EDI files or New EDI Files: 90 days to make changes and test with the carriers.

RESOURCES AND TRAINING

Below are links to our full training catalog along with additional resources for you and your team.

PREPARING FOR OPEN ENROLLMENT

Paycor highly recommends allowing 30 days prior to your Open Enrollment launch, so that you can prepare and review your plans. We recommend this even if you have minimum changes. We also suggest with this first Open Enrollment on the new platform be an active enrollment to allow employees to view coverage and update any additional missing information.

- Open Enrollment Wizard: Self-guided wizard
 - Begin building out your Open Enrollment, 30 days prior to company's launch date
 - Allow for 2 weeks for your company to test Open Enrollment setup.
 - Changes to EDI files must be provided 60 days prior to the close of the Open Enrollment.
- Complete [Benefits Advisor: Open Enrollment Wizard](#) webinar
- View additional Open Enrollment help guides on [Get Help](#)

TRANSITION COMMUNICATION HUB

- [Microsite](#)

TRAINING COURSES

- [Benefits Advisor Navigation](#)
- [Benefits Advisor Report Center](#)
- [Benefits Advisor: Reports](#)
- [Benefits Advisor: Plan Selection](#)
- [Benefits Advisor: Special Enrollment](#)
- [Benefits Advisor: Uploading Documents to and Managing the Library](#)

JOB AIDS

- Product Overview
- Creating a Special Enrollment
- Plan Selection
- Reports
- Commonly Used Reports
- Navigation
- Pending Enrollments
- [Review How to Pull Perform Benefit History](#)