Open Enrollment Wizard FAQs for Paycor's Broker Partners

How do I (a broker) access the OE Wizard?

For a broker admin to access the OE Wizard:

- Complete the required training to gain access.
- Login to **Benefits Advisor** >> **Select "Role" and select the applicable client** >> **Select "Go to Annual Open Enrollment Wizard"** link in the center of your Benefits Advisor home screen.
- A helpful introduction video is presented after entering the OE Wizard.
- Once you're ready to use the OE Wizard, **it will guide you through the necessary steps** to capture all changes for the upcoming plan year, allow you to thoroughly test in our Sandbox environment with real employees, and launch your open enrollment; all on your own timeline.
- We recommend you set aside 1-2 hours for this and have all necessary plan documents, rates and information readily available.

How does my client access the OE Wizard?

- Complete the required training to gain access.
- Login to **Paycor** >> **Search "Benefits Advisor" in the search navigation field** >> **Select "Benefits Advisor"** >> **"Go to Annual Open Enrollment Wizard"** link in the center of your Benefits Advisor home screen.
- A helpful introduction video is presented after entering the OE Wizard.
- Once you are ready to use the OE Wizard, **it will guide you through the necessary steps** to capture all changes for the upcoming plan year, allow you to thoroughly test in our Sandbox environment with real employees, and launch your open enrollment; all on your own timeline.

I'm used to Paycor building my OE for me, why should I use the OE Wizard?

We want you to have the flexibility and control to prepare your Open Enrollment on your schedule, not ours. Once all completed plan change documents are received, Paycor requires two weeks (excluding holidays and weekends) to complete an OE Plan Build and we strongly recommend an additional week for testing. By using the OE Wizard, you can complete the setup, test your changes, and launch your OE at any time, 24/7, and you do not have to rely on Paycor's standard Service Level Agreement (SLA).

What should I do if I run into a question or get stuck in the OE Wizard outside of Paycor's business hours?

We have built in a **wide variety of in-app assistance.** You can reference the tutorial videos in the upper right of many pages, or the extensive "How-To" PDF guide that's available in the lower left throughout the tool.

What if I'm unable to complete my updates on my own within the OE Wizard?

Your Paycor OE Consultant will remain with you every step of the way. In the event they need to step in and take over, you will be required to complete the monthly **rate sheet** (for plans with rate changes only) and **business requirement** document (if adding new plans) to ensure Paycor has the information needed. For Wizard eligible customers, there is a cost associated with Paycor building their open enrollment. A 4-week timeline is required for build after receiving all necessary documentation.

Have other Paycor customers used the OE Wizard for their renewal?

Many customers have already successfully completed their OE with the OE Wizard and were incredibly pleased with the experience. **Paycor and bswift have completed significant development and testing to ensure a seamless user experience.**

Are there Training Resources for my clients?

Yes! We offer an on-demand webinar training presented by Paycor's OE experts, as well as comprehensive online eLearning.

OE Wizard Resources:

- **Getting Started**
- **Adding New Plans**
- **Updated Rates**
- **Updating FSA Plans & Limits**
- **Setting Up Enrollment Rules**

Questions?

Contact your Paycor OE Consultant.

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