



Open Enrollment Wizard FAQs

How does my broker access the OE Wizard?

- Select “Go to Annual Open Enrollment Wizard” link in the center of the Benefits Advisor home screen.
- Once your broker is ready to use the OE Wizard, **it will guide them through the necessary steps** to capture all changes for the upcoming plan year, allow them to thoroughly test in our Sandbox environment with real employees and launch Open Enrollment, all on the broker’s timeline.
- Verify your broker’s access to Benefits Advisor by following [these instructions](#).
- If your broker does not have access, you can grant it by completing [this form](#).

How can I access the OE Wizard?

- Login to Paycor >> Search “Benefits Advisor” in the search navigation field >> Select “Configure Your Open Enrollment” link the center of the 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. Since you are eligible for the Wizard, fees are associated with Paycor building this for you. Once we receive all required documentation, a 4-week timeline is required before you can launch Open Enrollment.

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](#)
- [Updating FSA Plans & Limits](#)
- [Adding New Plans](#)
- [Setting Up Enrollment Rules](#)
- [Updated Rates](#)



Questions?



Contact your Paycor OE Consultant.