



Resource Guide & FAQ for Paycor Customers

Technology-Enabled Open Enrollment, *Powered by the OE Wizard.*

The OE Wizard is now Technology-Enabled Open Enrollment, powered by the OE Wizard. The new name better reflects the full range of enrollment experiences available through Benefits Advisor. The tool you know, the Benefits Consultant support you count on, and the established timelines and testing capabilities all stay the same.

This year, more Benefits Advisor and Benefits Advisor Pro customers can use it. During the enrollment experience assessment, we'll gain a better understanding of organizational goals, planned changes, and desired level of support. With the right experience in place, clients can confidently manage their enrollment strategy while leveraging Paycor expertise as needed.

Why Customers Choose It



Control

Manage enrollment activities on your own schedule while keeping full visibility into the process.



Flexibility

Work at your own pace with consultative guidance from your Benefits Consultant.



Testing

Validate plan setup and employee elections before launch.



Less Manual Work

Guided workflows cut down on manual setup and prep time.

What's Changing

- More customers can use Technology-Enabled Open Enrollment.
- Paycor can now complete select complex changes without taking over the entire project.
- Additional enrollment options are available, including Guided Enrollment and Expedited Enrollment.

What's Not Changing

- Required timelines and project milestones.
- Testing and validation requirements.
- Dedicated Benefits Consultant support and guidance.

Getting Started

- 1 Log in to Paycor.
- 2 Search Benefits Advisor and select it.
- 3 Select Go to Annual Open Enrollment Wizard.



Common Questions:

Will I still manage my own Open Enrollment?

In most cases, yes. Technology-Enabled Open Enrollment lets you keep ownership of your enrollment activities. If specific changes need Paycor's help, Paycor may complete those components while you keep managing the rest.

What if I need help during the process?

Your Benefits Consultant stays with you throughout. Guided Enrollment is also available if you want more hands-on support.

Does this remove timeline requirements?

No. Every enrollment experience stays subject to required project timelines, documentation, testing, and launch milestones.

Why is final renewal information required before getting started?

Finalized plans, rates, carrier decisions, and contribution information help prevent project delays and avoid rework once enrollment activities begin.

Where can I find more resources?

Training videos, job aids, your **Open Enrollment Playbook**, and more are all available in the **OE microsite** (Paycor.com/open-enrollment).



Questions?



Your Paycor Benefits Consultant is here to help.