



## Resource Guide & FAQ for Paycor Broker Partners

# 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 to your clients through Benefits Advisor. The tool you know, the Benefits Consultant support your clients 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 of your clients can use Technology-Enabled Open Enrollment.
- Paycor can now complete select complex changes for a client without taking over the entire project.
- Additional enrollment options are available for your clients, 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 for every client.

## Getting Started (Broker Access)

If you need access to a client's Benefits Advisor account, submit the **Broker Admin Access Form**.

- 1 Log in to **Benefits Advisor**.
- 2 Select your role and the applicable client.
- 3 Select Go to Annual Open Enrollment Wizard.



## FAQs:

### Will my client still manage their own Open Enrollment?

In most cases, yes. Technology-Enabled Open Enrollment lets clients keep ownership of their enrollment activities. If specific changes need Paycor's help, Paycor may complete those components while the client keeps managing the rest, and you stay in the loop throughout.

### What if a client needs more help during the process?

Their Benefits Consultant stays with them throughout. Guided Enrollment is also available for clients who want more hands-on support.

### Does this remove timeline requirements for my clients?

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

### Why is final renewal information required before a client gets started?

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

### Where can I find resources to share with clients?

Training videos, job aids, eLearning courses, webinars, and the **Open Enrollment Playbook** are all available in the **OE microsite** ([Paycor.com/open-enrollment](https://paycor.com/open-enrollment)). Help your clients complete training, gather plan details, test in Sandbox, and launch OE on their own timeline.



## Questions?

Paycor Partner Care is here to help you support your clients.