

# AutoEnroll

# Upload & Email Documents

A valid email address must be on file for the employee in AE. Client administrators must initiate the email contact.

1. From the AE administrator home page, select “Message Center” from the Administration drop down menu

2. Click on “New Message”

3. Select “Select Employee(s) from the “To” drop down menu and click the “Details” button

Note: If you receive an error message, close the box by clicking on the “X” in upper right hand corner and repeat Step 3 above.

4. Type in the employee's SSN and click the "Search" button
5. Highlight the employee's name in the Search Results and assign to the Selected Members box by clicking on "Assign All" or using the arrow keys. Click "Save".

Details X

**Search for an Employee**

You may search for an employee by entering the first name, last name, and/or Social Security Number of an employee. You are able to search with as little as the first letter of the employee's last name.

Search Name or SSN  Search

Search Results Selected Members

Test Testpetinsurance  
test testsampletest

Select All Clear All

Cancel Save

Close

6. Fill in the subject line and complete your email message.

7. You do not need to do anything with the effective date or check box options when sending an email to a specific employee.

8. You can upload an attachment to include with your email.

9. The system default is to send the employee a "Generic Email Notification" (i.e. the employee will receive an email message advising they have a message in the benefits center. A link to the AE login page will be included. You can change the default to "Send Message in Email" or "Message Center Only".

- **Send Message in Email** – The message you typed will be emailed to the employee. A link to AE will not be included however, the message will also be in the Message Center at the employee level.
- **\*Message Center Only** – The employee will not receive an email directly. The message you sent will only appear in the Message Center at the employee level. This option can be used if there is no email address on file for the employee. The employee will not receive notification that they have an email in the Message Center.

10. Select your messaging option and click "Send".

Subject \* Required Forms

Message Please provide the forms required for your election

Effective Date     (MM/DD/YYYY)

Exclude terminated members  Exclude members that have completed open enrollment

Send \* Generic Email Notification

\* Message will be sent to the message center and a generic email notification of will be sent to the user.

Upload a Document

Select file(s) for upload: Choose Files No file chosen Supported formats are: 'rtf', 'txt', 'doc', 'docx', 'pdf', 'jpg', 'jpeg', 'tiff', 'tif', 'bmp', 'png', 'gif'



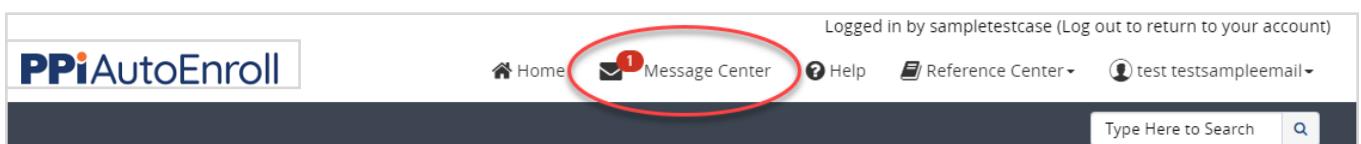
## Generic Email Notification

You have received a message in your benefits message center.  
Please click on the link below and log in to retrieve your message.

[www.ppienroll.com](http://www.ppienroll.com)

If you are unable to click on the link, please copy it into your browser.

11. After the employee logs into AE, they can click on "Message Center" to see the message from the administrator.



12. Employees can reply to email and attach necessary documents.

The screenshot shows an email inbox with two items: 'Inbox' and 'Sent Items'. The 'Inbox' item is selected. Below the inbox, there are buttons for 'Mark As Read' and 'Delete'. The list of messages includes a message from 'PPI Generic' with the subject 'Required Forms', sent on 'Sep 30, 2022 09:17 AM'. The message content is as follows:

From: PPI Generic  
Subject: Required Forms  
Date: Fri, Sep 30, 2022 9:17 AM  
To: test testsampleemail

Please provide the forms required for your election

Below the message, there is an 'Upload a Document' interface with a file input field labeled 'Select file(s) for upload:' and a 'Choose Files' button. A note says 'Supported formats are: 'rtf', 'txt', 'doc', 'docx', 'pdf', 'jpg', 'jpeg', 'tiff', 'tif', 'bmp', 'png', 'gif''. At the bottom right of the interface, there are three small red dots.

13. The administrator will be able see the employee's reply and attachments in their administrator level Message Center. Administrators do not receive notification when new emails arrive.

The screenshot shows the PPI Message Center interface. At the top, there are six categories: Action Needed (with a briefcase icon), My Inbox (with an envelope icon and a red notification dot), Pending (with a folder icon), Pending Verification (with a folder icon), No Changes (with a folder icon), and In Progress (with a folder icon). Below these are three tabs: Inbox (selected), Sent Items, and Archived Items. A toolbar below the tabs includes New Message, Mark As Read, Delete, Attach to Case, and Archive. A search bar labeled 'Show all company messages' and a 'Filter' input field are also present. The main list area shows one entry: 'test testsampleemail' from 'Required Forms' on 'Sep 30, 2022 09:34 AM' to 'Inbox - PPI Generic'. Below this, a preview window shows the email details: From: test testsampleemail, Subject: Required Forms, Date: Fri, Sep 30, 2022 9:34 AM, To: PPI Generic, and an attachment: PPI-COBRA.pdf. The email body text is: 'Please provide the forms required for your election'.

14. The uploaded document will become part of the member's record stored in their file under "Documents"

The screenshot shows the 'Employees - View' page for a member with the email 'test testsampleemail'. A dropdown menu titled 'Please select an action' is open, listing several options: Edit/Term, History, Benefit Summary, Member Plan Comparison, Payroll Summary, Reference Center, and Documents. The 'Documents' option is highlighted with a blue bar and a cursor is hovering over it. Other options visible in the dropdown include New Message and 1095 Reporting Info.