Employee Navigator
New Client Checklist

Our goal at PPI is to provide our clients and their employees with an efficient and user-friendly online solution to manage employee benefits. Using Employee Navigator, employees can make their own benefit elections while HR administrators can easily update, manage, and review their employees' benefit details. Manual updates to insurance carriers and vendors are greatly reduced, if not eliminated, with automated integrations that are established and monitored by PPI.

A successful implementation of Employee Navigator depends on complete and accurate information, so your company's rules and plan details work as expected within the platform. Once we build the platform to the specifications you provide, we will coordinate an introduction and demonstration of the Employee Navigator system for your HR staff. The following checklist will help ensure all required items are completed and submitted to PPI, so that we may begin the process. **Your prompt return of these items is a critical first step.**

- **Implementation workbook**
  - Please complete all applicable sections in their entirety
  - At renewal, the Implementation Workbook with only applicable information completed (e.g., new plans, contribution changes)
- **Benefit Summaries**
  - Please provide a benefit summary for each plan
- ***Initial* Employee Demographic Census**
  - Review Field Requirements tab on census template provided
    - Excel reports will be accepted if field requirements are met
  - Dependent information needed if applicable
- ***Final* Employee Demographic Census** to be provided 7-10 days prior to go-live
  - Client to keep track of employee changes after Final Employee Demographic Census has been submitted until official go-live date. Changes will be inputted during client administrator training
- **Benefit Enrollment Census** (from carrier if needed)

Please return this checklist and all completed documents/items to:

PPIEE-Nav@ppibenefits.com

Benefits. Technology. Heart.