

AutoEnroll

General Administration Guide

AutoEnroll gives employers a single point of entry to enroll employees and update benefit eligibility directly to carriers. Paperless, web-based processing of elections, employee changes and terminations ensure secure transmission of personal and identifiable information, immediate confirmation of changes, and better accuracy over handwritten forms.

This general navigation guide is your introduction to the AutoEnroll Administrative System, and will cover:

1. Administrator Home Page
 - Reference Center
 - Compliance Resources
 - Contact Information
2. How to Add a new employee
3. How to enroll a new employee or make a life event change
4. How to Terminate an employee
5. Processing COBRA elections
6. Reports
 - How to Run Reports
 - COBRA Premium Reports
 - Build-A-Report

Getting Started

Go to www.ppienroll.com and login using your administrator login information.

Please email clientservices@ppibenefits.com if you have forgotten your login information.

The screenshot shows the PPI AutoEnroll login interface. At the top is the 'PPIAutoEnroll' header. Below it is a 'Welcome' section. On the left, there are two input fields: 'User Name *' with the text 'KarenG' and a 'Password *' field with masked characters. Both fields are labeled 'case sensitive' below them. A blue 'Login >' button is positioned below the password field. A link for 'Forgot your user name or password?' is located at the bottom of the login area. On the right side, there is a 'First time here?' section with the text 'Register to create your user name and password.' and a 'Register' button.

Navigation Overview

The AutoEnroll Administrator Home Page provides a portal from which administrators can manage employee eligibility, and includes a number of HR and employee benefit resources.

The screenshot shows the PPI AutoEnroll Administrator Home Page. The page has a top navigation bar with links for Home, Live Chat, Help, and a user profile for Karen Greco - PPI1. Below this is a main menu bar with links for Company, Benefits, Employees, Administration, and Reports. An Advanced Search bar is located on the right side of the main menu bar.

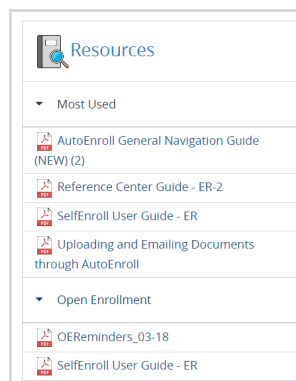
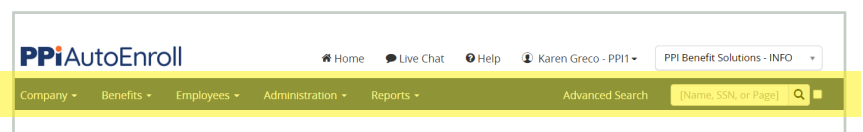
Annotations with arrows point to various features:

- Search for employees using names or SSNs:** Points to the Advanced Search bar in the top navigation bar.
- Review/Approve Pending Employee Transactions:** Points to the 'Action Needed' icon in the 'Karen's Message Center' section.
- email and phone numbers for PPI services:** Points to the 'PPI Client Services Team' section, which includes contact information for PPI.
- Reference Center for helpful how-tos:** Points to the 'Resources' section, which lists various guides and documents.
- Access to online compliance suite, Learning platform, and HR apps:** Points to the 'Compliance' section, which lists various compliance resources.
- Helpful tips and important news:** Points to the 'FEATURE FLASH' section, which provides shortcuts for using the search bar.

Administrative Functionality

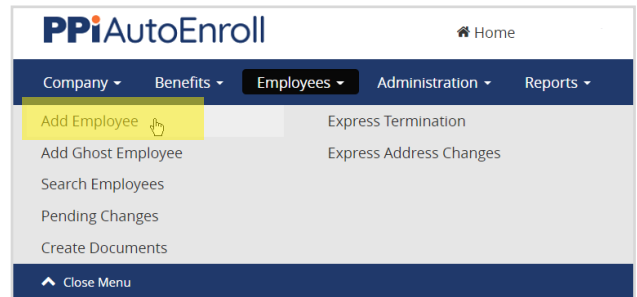
From the main menu bar, administrators can perform day-to-day tasks such as adding new hires, searching for existing employees, or searching for any pending changes on an employee's record.

The Reference Center is in the Resources section and houses administrative guidance to assist in the administration of your employee benefit plans.



Add a New Employee

1. Click on the "Employees" button in the navigation toolbar at the top of the screen.
2. Click on the "Add Employee."



Fill in all of the applicable employee information.

Required fields appear in red.

Please note: changes must be made in AutoEnroll by the 10th of the month in order to be reflected on your next PPI bill; otherwise they will first be reflected on the following month's bill.

SelfEnroll Clients – ACTION REQUIRED: Please enter your employee's email address in the fields below to trigger the new hire email notification with enrollment instructions.

Note: The Date of Eligibility field on the Employment Information page is only used if you have received confirmation from PPI that this field applies to your organization.

Annual Compensation is REQUIRED if you offer Salaried Life and/or Disability plans. Additionally, SelfEnroll clients MUST designate the benefit deduction frequency in the Payroll Frequency field. Please complete the following fields if this criteria applies to your organization.

3. Once you have filled in all of the information, scroll to the bottom of the page and click on the "Employee Data" button. This will register the employee's information in AutoEnroll, and allow you to make the employee's benefit elections.

Employees - Add An Employee

First Name: *

Middle Initial:

Last Name: *

Suffix:
 Jr., Sr., III, etc.

Social Security Number: *
 123-45-6789

Date of Birth: *
 MM/DD/YYYY

Gender: *
 Please Select One

Ethnic Identification:
 Please Select One

Address 1: *

Address 2:

City: *

State: *
 Please select one

ZIP: *

Home Phone:
 555-555-1234

Work Phone:
 555-555-1234

SelfEnroll Clients - ACTION REQUIRED: Please enter your employee's email address in the fields below to trigger the new hire email notification with enrollment instructions.

Email Address:
 user@mydomain.com

Confirm Email Address:

Alternate Email:

Marital Status: *
 Please Select One

Benefit Status: *
 Please Select One

Date of Hire: *
 MM/DD/YYYY

Date of Eligibility (DOE) - *LIMITED USE FIELD*: Please do not input date information into the DOE field unless you've received confirmation from PPI that this field applies to your organization.

Date of Eligibility:
 MM/DD/YYYY

Job Title:

EEO Classification:
 Please Select One

Employee Number:

Employment Status: *
 Please Select One

Structure: *
 Please Select One

PLEASE REVIEW: Annual Compensation is REQUIRED if you offer Salaried Life and/or Disability plans. Additionally, SelfEnroll clients **MUST** designate the benefit deduction frequency in the **Payroll Frequency field**. Please complete the following fields if this criteria applies to your organization.

Annual Compensation 1:
 0.00

Payroll Frequency:
 Please Select One

Employee Data

Enroll a New Employee or Make Life-Event Change

1. New hire Enrollments and processing any type of change begins from the Reason for Change Screen. This screen appears after entering new Employee Data, or when Edit/Term is selected from the action drop-down on a employee's record.
2. Expand the change categories by clicking the arrow in each section to reveal a list of reasons for the change, and select the one that applies. For a new hire, select "New Hire Enrollment."
3. Coverage effective dates and termination dates will automatically be calculated based on the date of event entered. If entering a coverage correction/change, enter the effective date of the change. Skip to Step 5 if you are adding a new employee.

For other changes, the Date of Event field should be populated with the actual date of the event, i.e. date of birth, date of marriage, date of termination.

Reason for Change

Karen Jones

Please select an action

Search Reasons for Change

Select the reason for change that applies and enter the date of the event. The Date of Event field should be populated with the actual date, i.e. date of birth, date of marriage, date of termination. Coverage effective dates and termination dates will automatically be calculated based on the date of event entered. If entering a coverage correction/change, enter the effective date of the change.

▼ ENROLLMENT
Examples:
New Hire Enrollment
Open Enrollment
New Hire Enrollment

► LIFE EVENT
Examples:
Marriage/Divorce
Birth/Death

► ADMINISTRATION
Examples:
Administrator Correction
Administrator Override

New Hire Enrollment

New hire eligibility will be based on the date of hire:

04/01/2022

MM/DD/YYYY

☐ Save Settings

Based on the date entered

- Coverage elected will be effective based on specific plan rule

Cancel Continue

4. If you are processing a life event or other change, clicking the Continue button will bring you to the Review Enrollment screen where you can use the Edit button to make the necessary changes, (e.g., Edit the "Your Information" section to change marital status to Married then Edit "Dependents" section to add the spouse before going through the election options). Skip to Step 7.
 5. Confirm information on the About You, Employment Information, and Compensation Information screens.
- Note:** The Date of Eligibility field on the Employment Information page is only used if you have received confirmation from PPI that this field applies to your organization.
6. Add Dependents on the Your Family page then click "Looks Good" to proceed with the election screens. Select whether to enroll or waive the coverage.

Your Family

Name	Relationship	Gender	Date of Birth
Scott Jones	Spouse	Male	04/02/1967

Edit

+ Add a New Dependent

Back Looks Good

Employment Information

Date of Hire: * 04/01/2022
MM/DD/YYYY

Date of Rehire:
MM/DD/YYYY

Date of Eligibility (DOE) - *LIMITED USE FIELD*: Please do not input date information into the DOE field unless you've received confirmation from PPI that this field applies to your organization.

Date of Eligibility:
MM/DD/YYYY

LOA Start Date:
MM/DD/YYYY

LOA Return Date:
MM/DD/YYYY

Date of Retirement:
MM/DD/YYYY

7. If the employee chooses to waive the coverage, select a reason from the Why Waive Coverage dropdown that appears.

8. Choose who will be covered from the list of eligibles.

9. Select the plan, and indicate if the member is enrolled in Medicare or other coverage, before click-ing Next.


10. Proceed similarly through all other coverages.

11. Review the information on the Review Enrollment screen, and use the Edit buttons to make any changes.

12. Scroll to the bottom of the screen and select Next to the Transaction Complete screen, where you will see a Confirmation Number.

From this screen you can print a Benefit Summary, add a note to the member's record, or search for another employee. Click on the member's name to go back to that member's record.

Medical



When most people think of benefits, they think about their medical insurance. It's by far the most popular benefit provided by employers, and it's not hard to understand why. Medical benefits are an important part of protecting you and your loved ones. By thoughtfully reviewing your options and selecting the best fit plan, you will not only have greater peace of mind, but could also reduce medical costs long term.

Would you like to enroll in Medical coverage?

☒ I Want Coverage
 ☐ Waive Coverage

Who would you like to cover with Medical coverage?

☒ Karen Jones (Required)

Effective Date	Term Date
04/01/2022	

Empire 1500/3000 Hospital Deductible - 0/50

Bi-Weekly Premium	Deductible	Out of Pocket Max
\$73.18	\$1,500	\$5,000
Employee Only	Individual	Individual

[Plan Details](#)
[Selected](#)

Question(s) regarding Karen Jones


Is the individual currently enrolled in Medicare?

☒ No
 ☐ Yes

Is the individual currently enrolled in other coverages?

☒ No
 ☐ Yes

Review Enrollment for Karen Jones



You're almost done! Please review your enrollment below.
You must click the **Approve** button before you will be enrolled in any plans.

- About You
- Employment Information
- Compensation Information
- Dependents - 1

Your Elections

[View All Details](#)

Plan	Coverage	Employee Cost Bi-Weekly	
Medical Empire 1500/3000 Hospital Deductible - 0/50 View Details	Karen Employee Only	\$73.18	Edit
Dental Coverage Waived		\$0.00	Edit
Vision Coverage Waived		\$0.00	Edit

Terminate an Employee

1. From the member's record, select "Edit/Term" from the action dropdown.
2. Expand the Administration section and select "Employment Termination."
3. Indicate if the Termination is Voluntary or Involuntary from the dropdown, and type in the last day of unemployment. Coverages will terminate based on plan rules.
4. The Review Enrollment screen will show Coverage Terminated for previously enrolled benefits.
5. Click the View Details under any coverage to see the Termination date of the plan by member.
6. Scroll down and select Approve.

Search Reasons for Change

Select the reason for change that applies and enter the date of the event. The Date of Event field should be populated with the actual date i.e. date of birth, date of marriage, date of termination. Coverage effective dates and termination dates will automatically be calculated based on the date of event entered. If entering a coverage correction/change, enter the effective date of the change.

BASIC INFO	LIFE EVENT	ADMINISTRATION
Examples: Change of Address Change of Beneficiary	Examples: Marriage/Divorce Birth/Death	Examples: Administrator Correction Administrator Override
		Add / Change Salary
		Assign/Change Department Code
		COBRA Election
		COBRA Election Event
		COBRA Termination
		Employment Termination
		Employment Transfer/Status Change

Plan

Medical

X Coverage Terminated

[View Details](#)

Medical Election Details

Enrolled in Medical?

No

Effective Date 01/01/2022

Term Date 04/30/2022

Covered Members

Members	Covered
Michael J Brown Effective Date: 01/01/2022 Term Date: 04/30/2022	No
Kathryn F Brown Effective Date: 01/01/2022 Term Date: 04/30/2022	No
John R Brown	No

COBRA Qualifying Event

Qualifying COBRA Event: **Employment Termination**

Gross Misconduct: ☐ Yes ☒ No

Date of Event: 04/12/2022
(MM/DD/YYYY)

Qualifying Event Covers:
(Select all that apply)

- ☒ Raymond L Dewley
- ☒ BENJAMIN A DEWLEY
- ☒ REBEKAH R DEWLEY
- ☒ DANIEL C DEWLEY
- ☒ BECKY J DEWLEY

COBRA Subsidy

Add New

Begin Date: (MM/DD/YYYY) End Date: (MM/DD/YYYY)

Plan Groups: ☐ dental ☐ flex ☐ legal2 ☐ medical

Employer: ☐ Monthly Percentage: % ☐ Monthly Amount: \$ ☐ Same as Employee: \$

Government: ☐ Federal: %

COBRA QE Information - 102972767			
Name Michael Brown	Event Employment Termination	Date of Event 04/12/2022	Last Day of Coverage 04/30/2022
	QE Sent Date 04/14/2022	COBRA Effective Date 05/01/2022	COBRA Exhaustion Date 10/31/2023
	Election Period End Date 06/29/2022		
Name Kathryn Brown	Event Employment Termination	Date of Event 04/12/2022	Last Day of Coverage 04/30/2022
	QE Sent Date 04/14/2022	COBRA Effective Date 05/01/2022	COBRA Exhaustion Date 10/31/2023
	Election Period End Date 06/29/2022		

7. If any of the terminated plans are eligible for COBRA, the Qualifying COBRA Event screen will appear. Indicate if the termination reason is or is not due to gross misconduct.
8. Click Next to complete the termination, print the new benefit summary, add a note to the member's record or search from a new record. Clicking the employee's name will return you to the member's record.
9. The member's record will now show COBRA QE information, including the date that notices will be sent, if PPI administers your COBRA.
10. Not sure if PPI administers your COBRA? Contact clientservices@ppibenefits.com.
11. If PPI does **not** administer your COBRA, you will need to process a COBRA election (see next page), after the member has acted on an election.

When PPI is Not Your COBRA Administrator

If you use a third party COBRA Administrator, there are some additional steps required after processing an employment termination, to ensure any participant-elected plans are reinstated.

1. Process an Employment Termination, as usual.
2. Once the Qualifying Beneficiary has paid, add COBRA by opening the member's record.

Select "COBRA Election" as the reason code, and enter the date COBRA coverage is to start (Effective Date).

Reason for Change
Susan Sample

Select a reason for change

Select the reason for change that applies and enter the date of the event. The Date of Event field should be populated with the actual date, i.e. date of birth, date of marriage, date of termination. Coverage effective dates and termination dates will automatically be calculated based on the date of event entered. If entering a coverage correction/change, enter the effective date of the change.

ADMINISTRATION
Examples:
Administrator Correction

COBRA Election

Rehire

3. Change the Benefit Status in the Personal Information section to "COBRA," and change the Structure Group in the Employment Information section to the appropriate COBRA structure group.

Benefit Status: Active

Ethnic Identification: Please Select One

Disabled: COBRA, Surviving Spouse, TEFRA

Previous Next

Available Groups (4)
Selected Groups (2)

Sample :: 12345 :: Employee :: Active
Sample :: 12345 :: Employee :: COBRA
Sample :: 12345 :: Executive :: Active
Sample :: 12345 :: Executive :: COBRA

Assign All

4. Add the elected COBRA plans by clicking Edit in the Election Information section then click Approve at the bottom of the screen. If you do not click Approve, your changes will not be processed.

Election Information Show All Details

Costs are Semi-Monthly Employee

Medical - Coverage Terminated \$0.00

Edit

Medical

Please make your medical election. Click Plan Details to view benefit amounts for that plan, or compare and click: Compare to view them side-by-side.

For more detailed information, visit the reference center to view the benefit summaries for each plan.

I Want Coverage Drop Coverage

Select your plan

Selected COBRA Medical POS OA 25/40

5. The member record should now reflect these changes.

Employees - View Susan Sample Please select an action

Personal Information - 108156201

Name	Address	Social Security Number	Date of Birth	Gender
Susan Sample	123 Anywhere Street Anytown, NJ 07024 US	999-99-9999	01/01/1980	Female

Benefit Status: COBRA

Employment Information

Date of Hire	Date of Termination	Department	Job Title	Employment Status	ACA Replying Override
01/01/2010	10/20/2016			Terminated - Involuntary	No Override

EEO Classification Employee Number Payroll Frequency Structure
Semi-Monthly Sample :: 12345 :: Employee :: COBRA

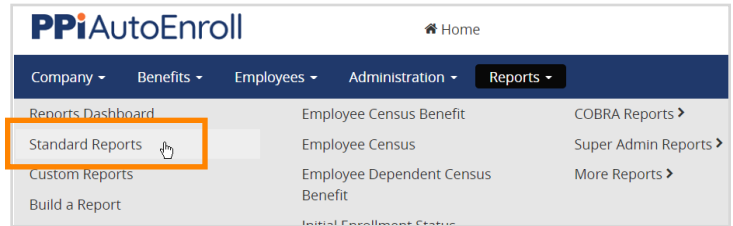
Election Information - Current

Medical Election - COBRA Medical POS OA 25/40

Coverage	Member(s)	Covered	Effective Date	Term Date
Employee Only	Susan Sample	Yes	11/01/2016	

How to Run Reports

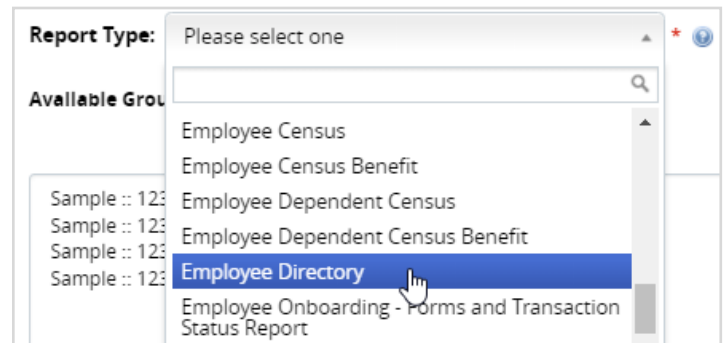
1. Click on the "Reports" button in the navigation toolbar.
2. Select a report from the options, or click on "Standard Reports."



3. Select a report from the "Report Type" dropdown menu.

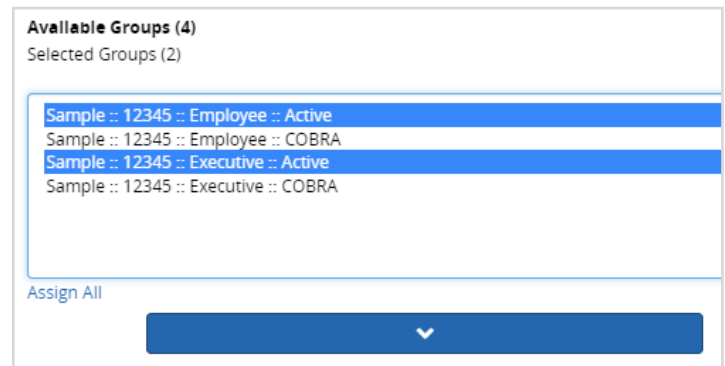
An "advanced" link is available for some reports and allows you to select fields to include in the report.

Information regarding the different types of reports is available under the "How-To" section of the PPI Client Help Center.



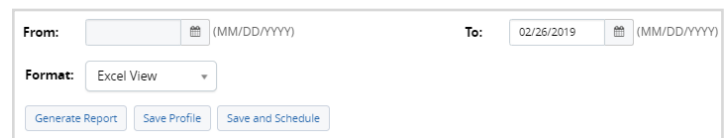
4. Select the structure groups to include in the report, and use the up and down bars to move them from the Available Groups box into the Selected Groups box.

You may select all, or use the Ctrl key to select specific structure groups. You can also use the search bar to find structure groups.



5. Fill in the "To" date, which is the point in time at which the data reported will end. The system defaults this field to the current date if nothing is entered.

The "From" date represents the point in time for which the data reported begins. This field is optional for most report types and is not available for some.



6. Once you've completed all of the required information, click the "Generate Report" button.
7. From the Reports Dashboard, click on the Dashboard tab to refresh the page. When your report is ready, the status of it will change to Completed, and you can click on the report name to open it. You will also receive an email when your report is ready, if you would rather do other things while the report generates.



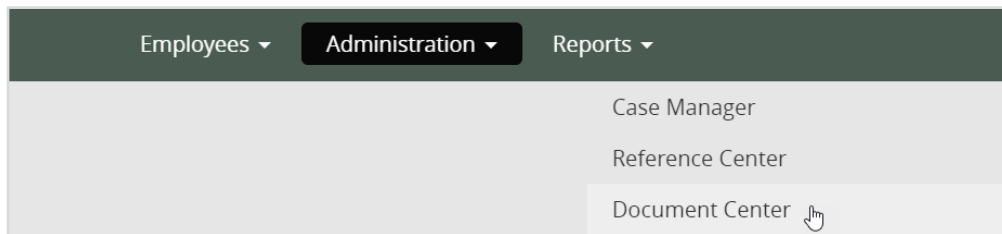
COBRA Premium Report

COBRA Premium Reports provide a detailed member-level summary of all participant COBRA premium payments paid to Businessolver. These reports can be used to validate the COBRA premiums you receive from PPI/Businessolver against those on the PPI Invoice.

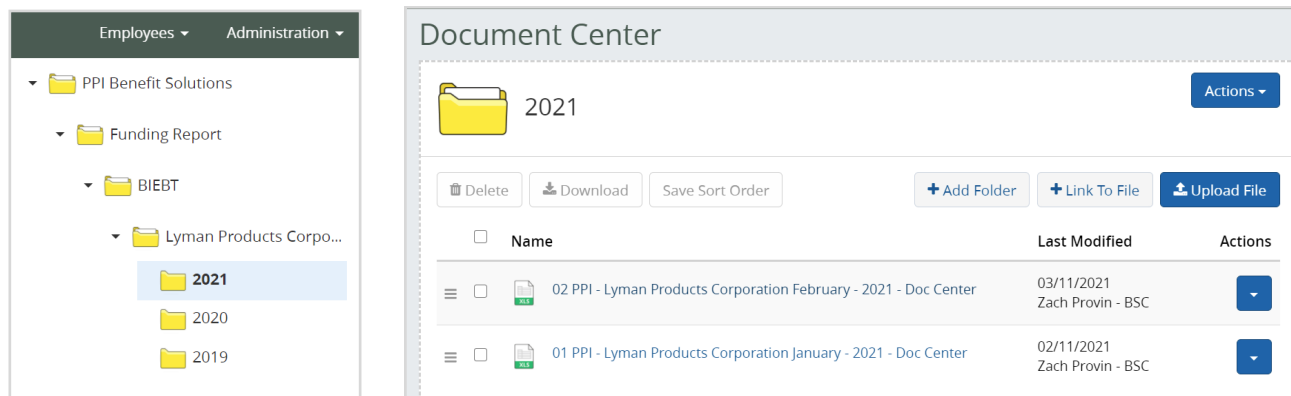
COBRA Premium Reports are available after the 10th of the month, after premium is collected from participants.

To Access the COBRA Premium Report:

1. The reports are stored in the AutoEnroll Document Center, within the “Funding Report” folder. To get there, click on “Administration” in the top menu, and select Document Center from the drop down:



2. Once you are in the Document Center, click on the “Funding Report” folder, and continue to click on the expandable folders until you find the month that you wish to review or save:



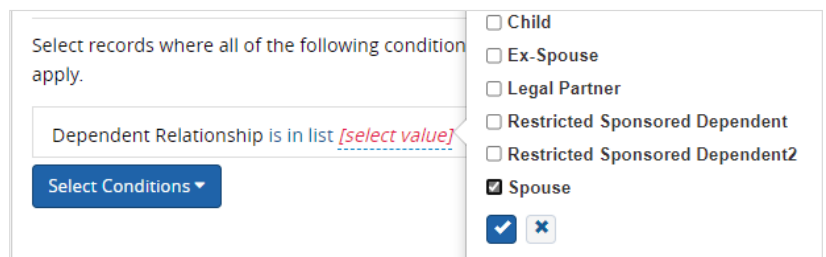
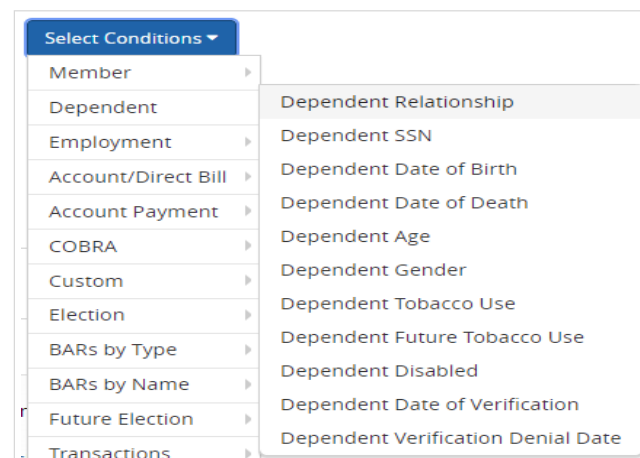
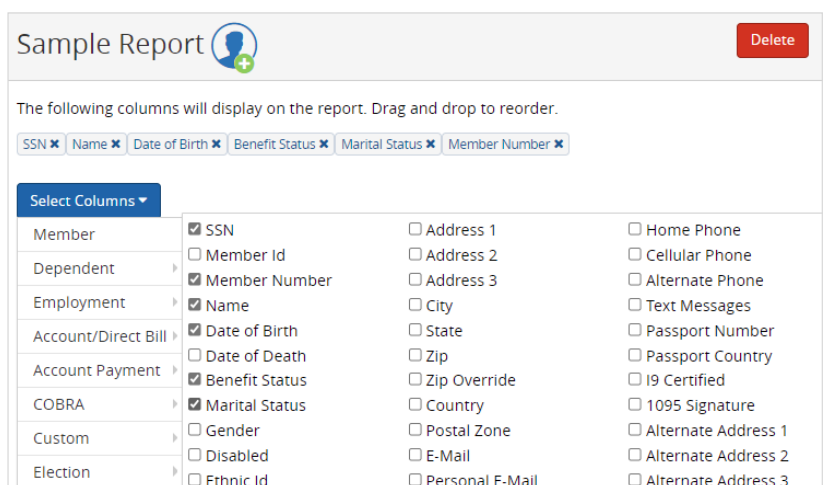
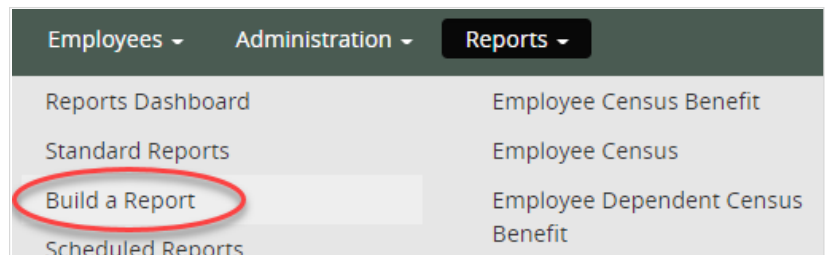
3. Click on the report name to download and open the report.

Build-A-Report

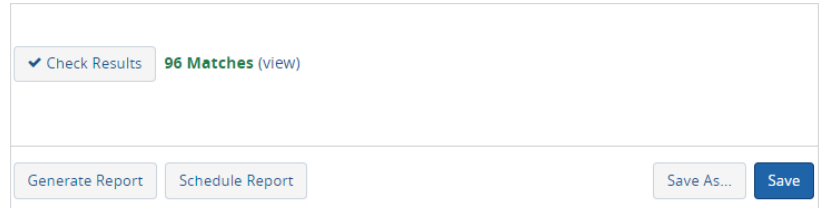
Build a Report makes it quick and easy to create custom-built reports with a multitude of field options that allow you to control the final output rather than relying on more rigid standard formats such as the Employee Census Benefit (ECB).

Start a New Report:

1. Navigate to Reports > Build a Report.
2. On the Administration - Reports, click +New Report in the blue bar.
3. Enter a name for the report and click Submit.
4. Click Select Columns to display column options for the report.
5. Hover over the options to select fields to include in your report, and repeat as necessary.
6. Click Select Conditions to filter which member records will display in the rows of the report.
7. Hover over a main condition category to display options for that condition.
8. Click the value for the condition (some options have a drop list, some have checkboxes, some open a calendar, and some are open text), and click the check mark to activate the condition + value rule for which members will display in the report rows.
9. Repeat to add multiple conditions.

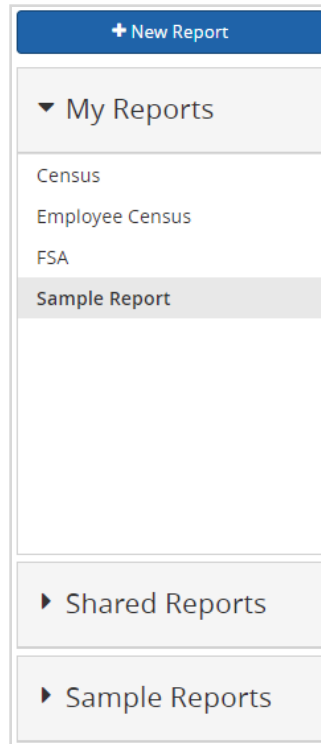


10. When all desired columns and conditions are finalized, click Save. The page will look the same, but doing so will save your configured columns and conditions and prepare the report for generation.
11. From here you can click Check Results to reveal the number of returned results or view a list of members who match the conditions and values or see a list of the members. Click Build a Report from the top menu to get back to the Report menu, where you can select the saved report from the My Reports list.
12. When ready, click Generate Report.
13. The report will appear in the main Reports Dashboard, and you will receive an email when the report is complete.
14. At any time, you can make changes to the report and Save over the original or Save As... to save it as a different report.



✓ Check Results 96 Matches (view)

Generate Report Schedule Report Save As... Save



+ New Report

▼ My Reports

- Census
- Employee Census
- FSA
- Sample Report

► Shared Reports

► Sample Reports