

# 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

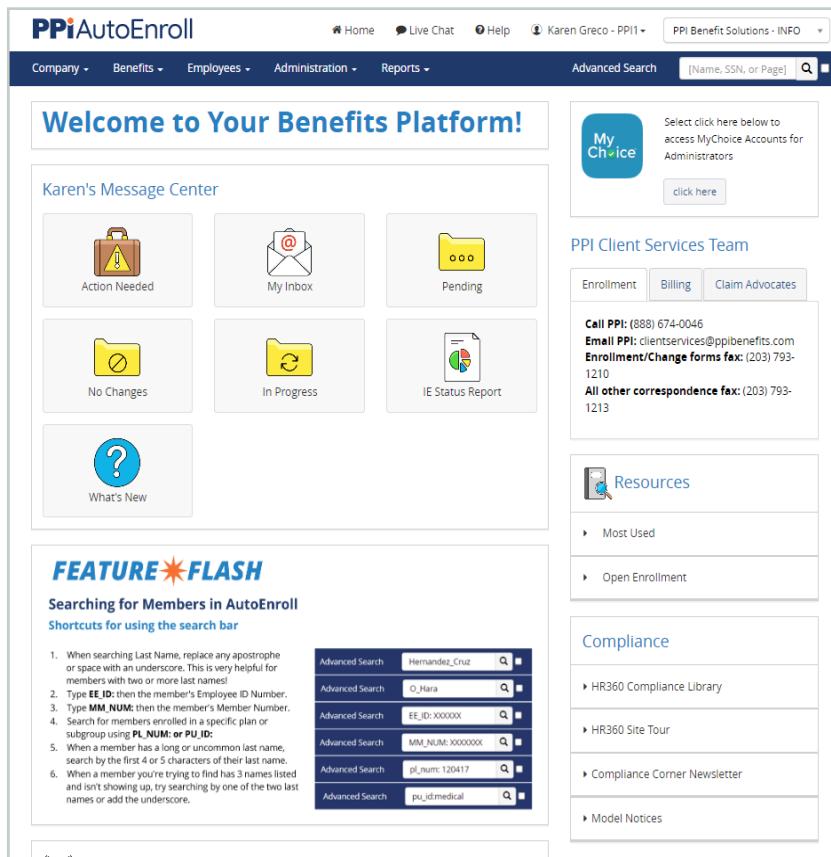
Go to [www.ppienroll.com](http://www.ppienroll.com) and login using your administrator login information.

Please email [clientservices@ppibenefits.com](mailto:clientservices@ppibenefits.com) if you have forgotten your login information.

The screenshot shows the PPIAutoEnroll login interface. The top navigation bar is dark blue with the PPI logo and 'AutoEnroll' text. The main content area has a white background. It starts with a 'Welcome' message. Below it are two input fields: 'User Name \*' containing 'KarenG' and 'Password \*' with a masked password. Each input field has a 'case sensitive' checkbox. To the right of these fields is a 'First time here?' section with a 'Register' button. At the bottom of the form is a 'Login' button and a 'Forgot your user name or password?' link.

## 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.



Review/Approve Pending Employee Transactions →

Helpful tips and important news →

Search for employees using names or SSNs ←

email and phone numbers for PPI services ←

Reference Center for helpful how-tos ←

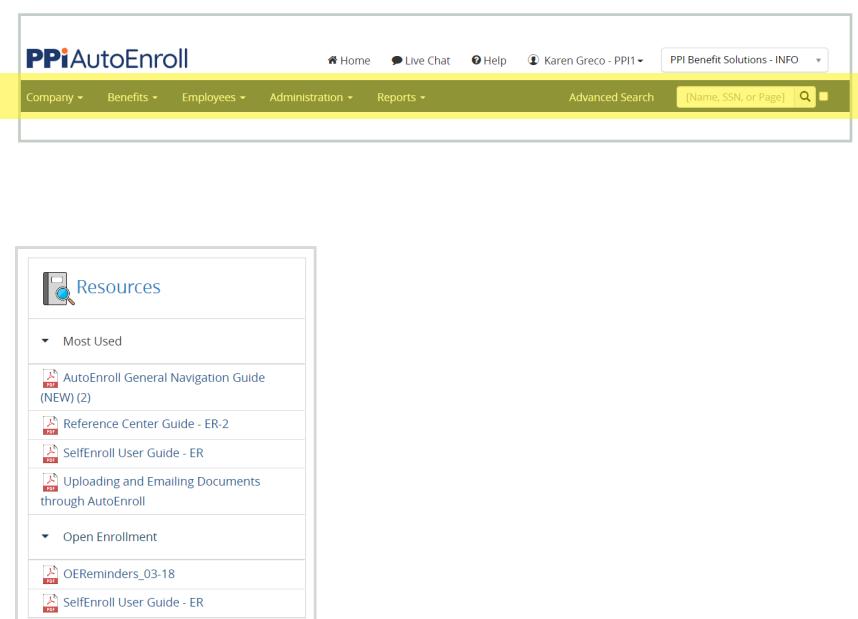
Access to online compliance suite, Learning platform, and HR apps ←

The screenshot shows the PPIAutoEnroll Home Page. The top navigation bar includes links for Home, Live Chat, Help, and Karen Greco - PPI1. A search bar is also present. The main content area features a "Welcome to Your Benefits Platform!" banner and a "Karen's Message Center" with various status boxes: Action Needed, My Inbox, Pending, No Changes, In Progress, and IE Status Report. Below this is a "FEATURE FLASH" section titled "Searching for Members in AutoEnroll" with a list of search tips and a screenshot of the Advanced Search interface. To the right are sections for "My Choice" (with a link to "click here"), "PPI Client Services Team" (listing contact information for PPI), "Resources" (with links to Most Used and Open Enrollment), "Compliance" (with links to HR360 Compliance Library, HR360 Site Tour, Compliance Corner Newsletter, and Model Notices), and a "Search for employees using names or SSNs" section.

## 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.

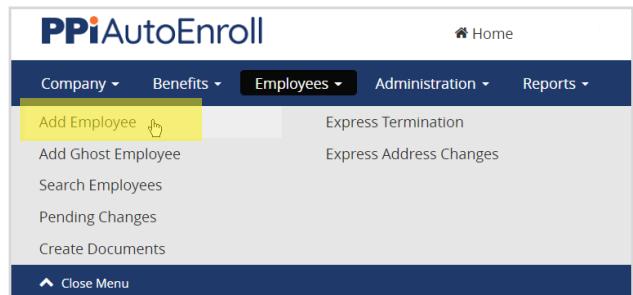
The Reference Center is in the Resources section and houses administrative guidance to assist in the administration of your employee benefit plans.



The screenshot shows the PPIAutoEnroll Home Page with a yellow highlight on the "Resources" section. The "Resources" section contains links to "Most Used" documents: AutoEnroll General Navigation Guide (NEW) (2), Reference Center Guide - ER-2, SelfEnroll User Guide - ER, Uploading and Emailing Documents through AutoEnroll, Open Enrollment, OEReminders\_03-18, and SelfEnroll User Guide - ER.

## 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.

**Employees - Add An Employee**

First Name: *	<input type="text"/>
Middle Initial:	<input type="text"/>
Last Name: *	<input type="text"/>
Suffix:	<input type="text"/>
Social Security Number: *	123-45-6789
Date of Birth: *	<input type="text"/>
Gender: *	<input type="text"/>
Ethnic Identification:	<input type="text"/>
Address 1: *	<input type="text"/>
Address 2:	<input type="text"/>
City: *	<input type="text"/>
State: *	<input type="text"/>
ZIP: *	<input type="text"/>
Home Phone:	555-555-1234
Work Phone:	555-555-1234
<b>SelfEnroll Clients - ACTION REQUIRED:</b> Please enter your employee's email address in the fields below to trigger the new hire email notification with enrollment instructions.	
Email Address:	<input type="text"/>
Confirm Email Address:	<input type="text"/>
Alternate Email:	<input type="text"/>
Marital Status: *	<input type="text"/>
Benefit Status: *	<input type="text"/>
Date of Hire: *	<input type="text"/>
<b>Date of Eligibility (DOE) - *LIMITED USE FIELD:</b> Please <i>do not</i> input date information into the DOE field unless you've received confirmation from PPI that this field applies to your organization.	
Date of Eligibility:	<input type="text"/>
Job Title:	<input type="text"/>
EEO Classification:	<input type="text"/>
Employee Number:	<input type="text"/>
Employment Status: *	<input type="text"/>
Structure: *	<input type="text"/>
<b>PLEASE REVIEW:</b> Annual Compensation is <b>REQUIRED</b> if you offer Salaried Life and/or Disability plans. Additionally, SelfEnroll clients <b>MUST</b> 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:	<input type="text"/>
Payroll Frequency:	<input type="text"/>
<b>Employee Data</b>	

**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.

## 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.

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	Actions
Scott Jones	Spouse	Male	04/02/1967	<a href="#">Edit</a>

[+ Add a New Dependent](#)

[Back](#) [Looks Good](#)

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 X

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](#)

Employment Information

Date of Hire: *	04/01/2022
MM/DD/YYYY	
Date of Rehire:	
MM/DD/YYYY	
<b>Date of Eligibility (DOE) - *LIMITED USE FIELD*</b> : Please <i>do not</i> 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:	

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 clicking 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
  Wave Coverage

Who would you like to cover with Medical coverage?

Karen Jones (Required)
 Effective Date

Term Date

**Empire 1500/3000 Hospital Deductible - 0/50**

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

i 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](#)

My Health

Plan	Coverage	Employee Cost
Medical Empire 1500/3000 Hospital Deductible - 0/50 <a href="#">View Details</a>	Karen Employee Only	\$73.18 <span style="color: #0070C0;">Edit</span>
Dental Coverage Waived		\$0.00 <span style="color: #0070C0;">Edit</span>
Vision Coverage Waived		\$0.00 <span style="color: #0070C0;">Edit</span>

## Terminate an Employee

- From the member's record, select "Edit/ Term" from the action dropdown.
- Expand the Administration section and select "Employment Termination."
- 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.
- The Review Enrollment screen will show Coverage Terminated for previously enrolled benefits.
- Click the View Details under any coverage to see the Termination date of the plan by member.
- Scroll down and select Approve.

- 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.
- 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.
- The member's record will now show COBRA QE information, including the date that notices will be sent, if PPI administers your COBRA.
- Not sure if PPI administers your COBRA? Contact [clientservices@ppibenefits.com](mailto:clientservices@ppibenefits.com).
- 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).

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.

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.

5. The member record should now reflect these changes.

## 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.

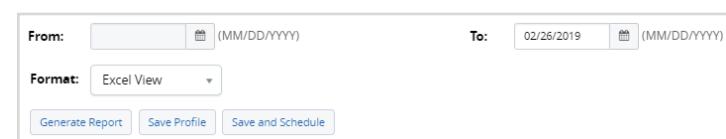
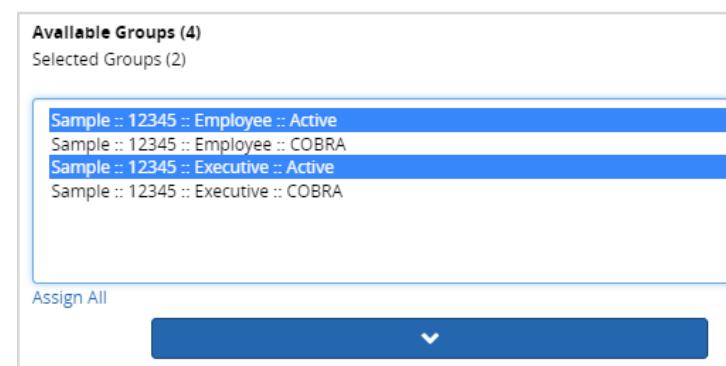
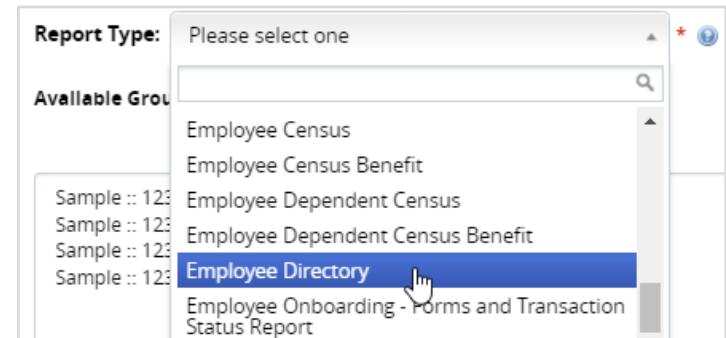
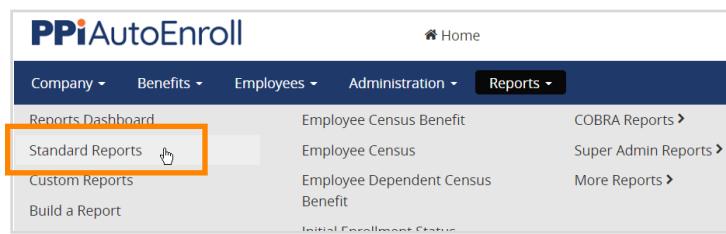
You may select all, or use the Ctrl key to select specific structure groups. You can also use the search bar to find structure groups.

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.



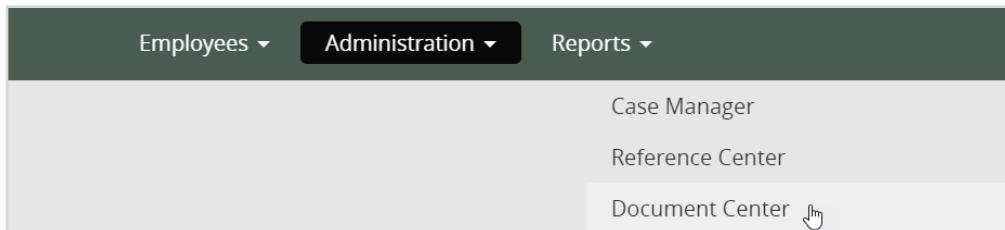
## COBRA Premium Report

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.

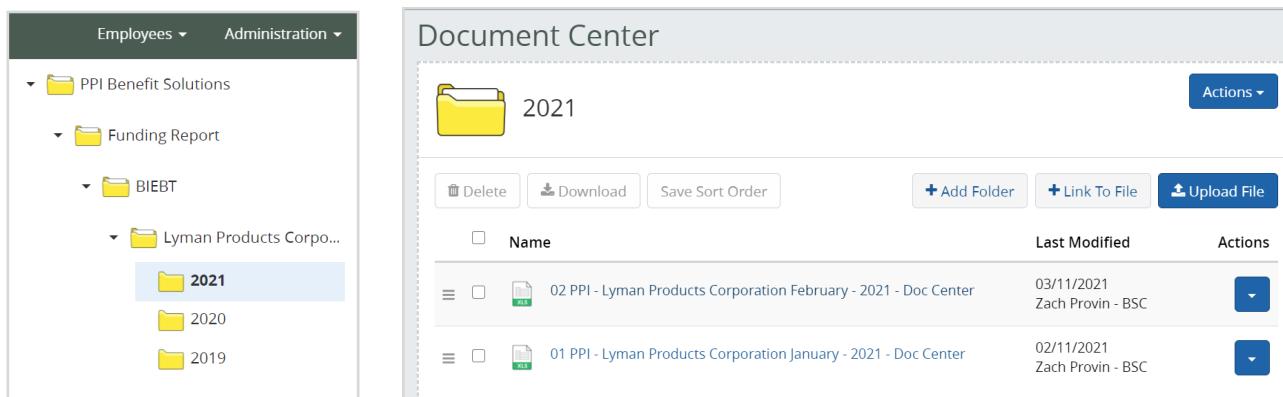
COBRA Premium Reports are available after the 10th of the month, after premium is collected from participants.

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:

A screenshot of the AutoEnroll Document Center. The left sidebar shows a tree view of folders: 'PPI Benefit Solutions' is expanded, showing 'Funding Report', which is also expanded, showing 'BIEBT', which is expanded, showing 'Lyman Products Corp...', which is expanded, showing '2021' (which is highlighted in blue), '2020', and '2019'. The main area is titled 'Document Center' and shows a list of files. At the top of the list is a folder icon for '2021'. Below the folder are buttons for 'Delete', 'Download', and 'Save Sort Order', and action buttons for '+ Add Folder', '+ Link To File', and 'Upload File'. The list of files includes two entries: '02 PPI - Lyman Products Corporation February - 2021 - Doc Center' (last modified 03/11/2021 by Zach Provin - BSC) and '01 PPI - Lyman Products Corporation January - 2021 - Doc Center' (last modified 02/11/2021 by Zach Provin - BSC). Each file entry has a checkbox, a file icon, and a 'Actions' dropdown menu.

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.

The screenshot shows the AutoEnroll Build-A-Report interface. At the top, there are navigation tabs: Employees, Administration, and Reports. The Reports tab is active, showing sub-options: Reports Dashboard, Standard Reports, Build a Report, and Scheduled Reports. The 'Build a Report' option is highlighted with a red oval.

The main area is titled 'Sample Report' with a user icon. It says, 'The following columns will display on the report. Drag and drop to reorder.' Below this is a list of columns with checkboxes:
 

- SSN (checked)
- Name (checked)
- Date of Birth (checked)
- Benefit Status (checked)
- Marital Status (checked)
- Member Number (checked)

Below this is a 'Select Columns' dropdown menu with a list of fields grouped by category:
 

- Member: SSN (checked), Member Id, Member Number (checked)
- Dependent: Name (checked), Date of Birth, Date of Death, Benefit Status (checked), Marital Status (checked)
- Employment: Name (checked), Date of Birth, Date of Death
- Account/Direct Bill: Date of Birth, Date of Death
- Account Payment: Benefit Status (checked), Marital Status (checked)
- COBRA: Marital Status (checked)
- Custom: Gender, Disabled
- Election: Ethnic Id
- Address: Address 1, Address 2, Address 3, City, State, Zip, Zip Override, Country, Postal Zone, E-Mail, Personal E-Mail
- Phone: Home Phone, Cellular Phone, Alternate Phone, Text Messages, Passport Number, Passport Country, I9 Certified, 1095 Signature, Alternate Address 1, Alternate Address 2, Alternate Address 3

The next section is 'Select Conditions' with a dropdown menu showing categories:
 

- Member
- Dependent
- Employment
- Account/Direct Bill
- Account Payment
- COBRA
- Custom
- Election
- BARs by Type
- BARs by Name
- Future Election
- Transactions

For the 'Dependent' condition, a list of options is shown:
 

- Dependent Relationship
- Dependent SSN
- Dependent Date of Birth
- Dependent Date of Death
- Dependent Age
- Dependent Gender
- Dependent Tobacco Use
- Dependent Future Tobacco Use
- Dependent Disabled
- Dependent Date of Verification
- Dependent Verification Denial Date

The final section is 'Select records where all of the following condition apply.' It shows a list of checkboxes:
 

- Child
- Ex-Spouse
- Legal Partner
- Restricted Sponsored Dependent
- Restricted Sponsored Dependent2
- Spouse

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.

The top screenshot shows a summary page with a 'Check Results' button, '96 Matches (view)', and buttons for 'Generate Report', 'Schedule Report', 'Save As...', and 'Save'. The bottom screenshot shows the 'My Reports' section of the Reports Dashboard, listing 'Census', 'Employee Census', 'FSA', and 'Sample Report'.