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.

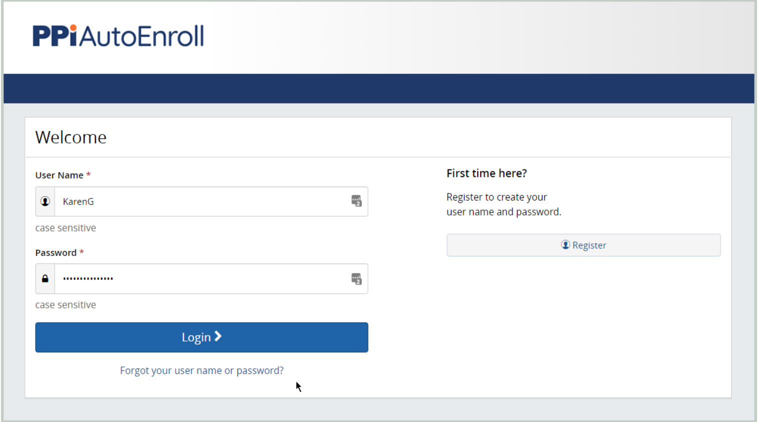
This general navigation guide is your introduction to the AutoEnroll Administrative System, and will cover:

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.

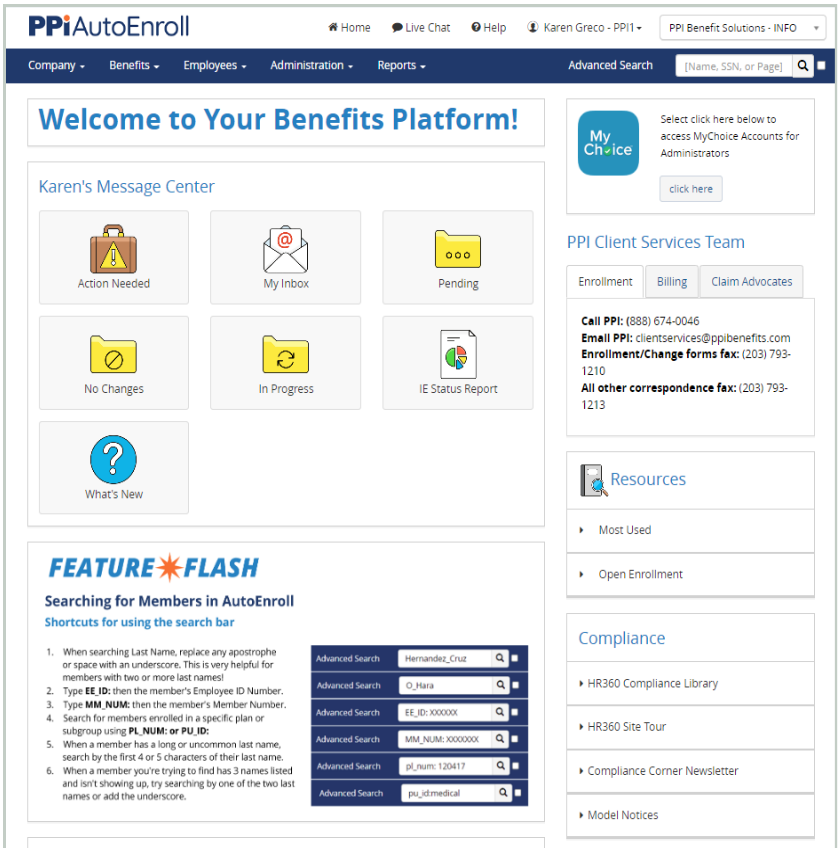


Navigation Overview

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

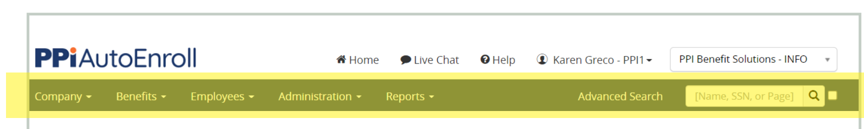
email and phone numbers for PPI services

Reference Center for helpful how-tos

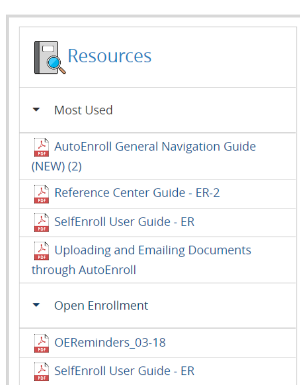
Access to online compliance suite, Learning platform, and HR apps

Administrative Functionality

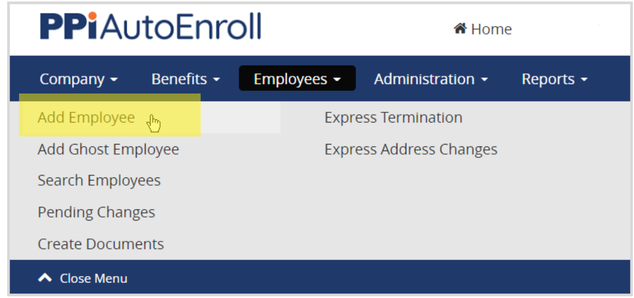
From the main menu bar, administrators can perform day-to-day tasks such as adding new hires, searching for existing employees, or searching for any pending changes on an employee's record.



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



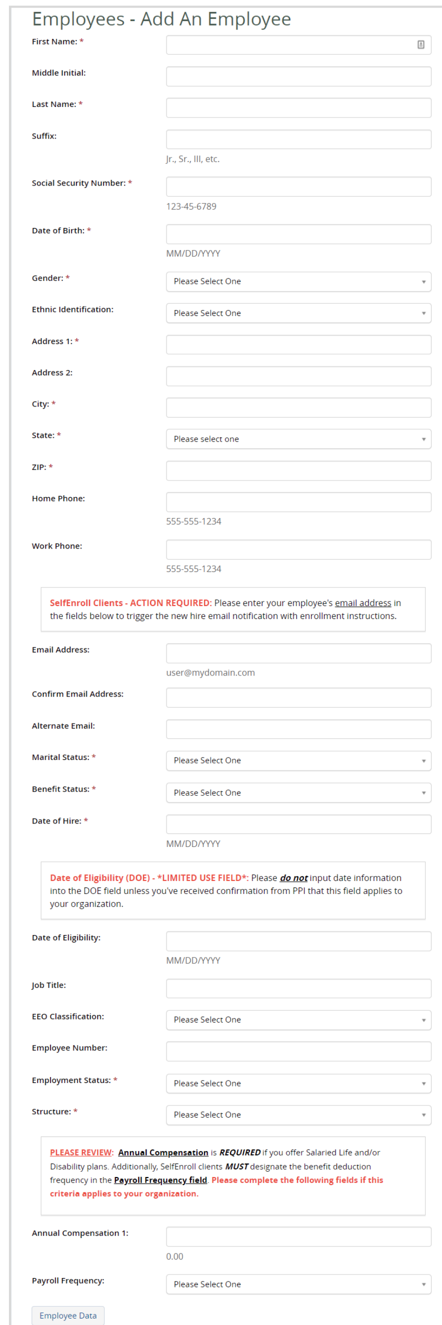
Add a New Employee



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.

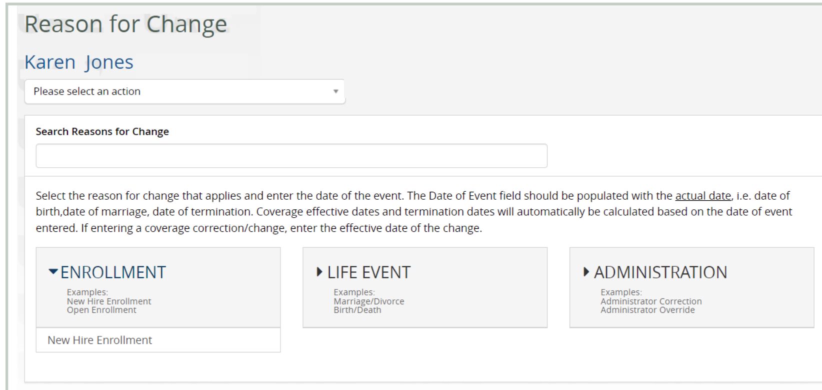
Note: The Date of Eligibility field on the Employment Information page is only used if you have received confirmation from PPI that this field applies to your organization.

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.

Enroll a New Employee or Make Life-Event Change

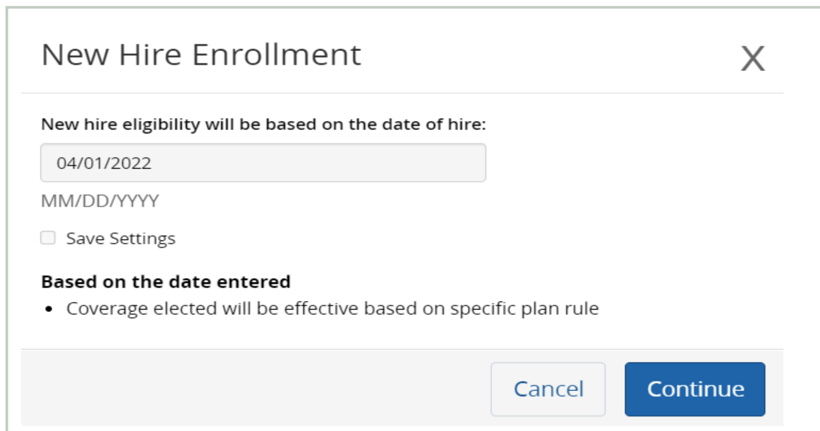
1. New hire Enrollments and processing any type of change begins from the Reason for Change Screen. This screen appears after entering new Employee Data, or when Edit/Term is selected from the action drop-down on a employee's record.



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.

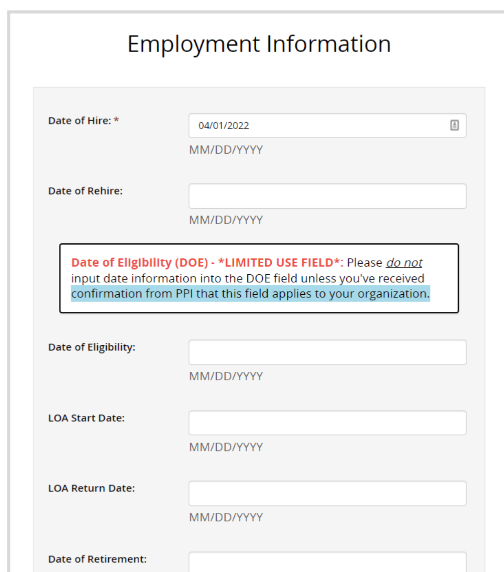
   For other changes, the Date of Event field should be populated with the actual date of the event, i.e. date of birth, date of marriage, date of termination.



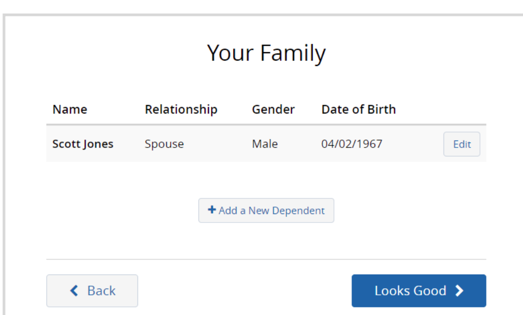
4. If you are processing a life event or other change, clicking the Continue button will bring you to the Review Enrollment screen where you can use the Edit button to make the necessary changes, (e.g., Edit the "Your Information" section to change marital status to Married then Edit "Dependents" section 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.

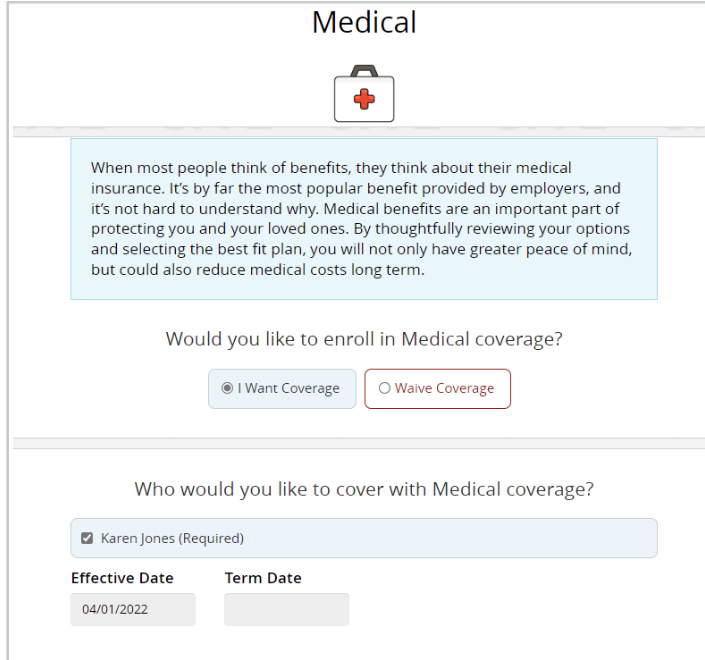
   Note: The Date of Eligibility field on the Employment Information page is only used if you have received confirmation from PPI that this field applies to your organization.



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.

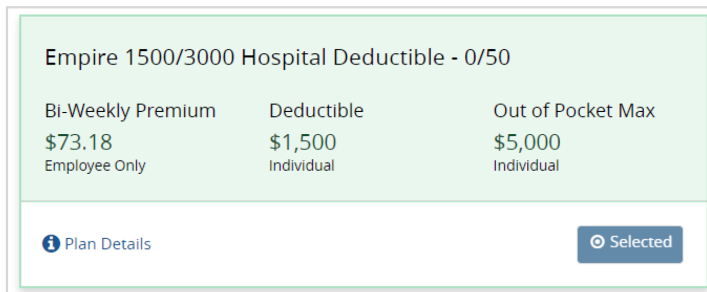


7. If the employee chooses to waive the coverage, select a reason from the Why Waive Coverage dropdown that appears.

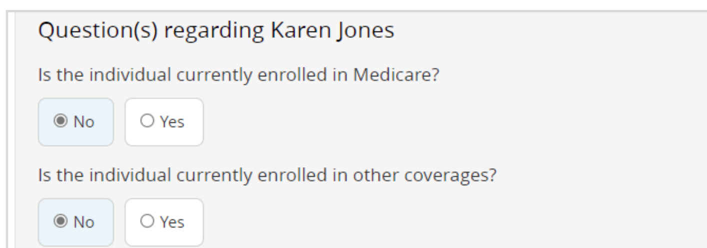


8. Choose who will be covered from the list of eligibles.

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



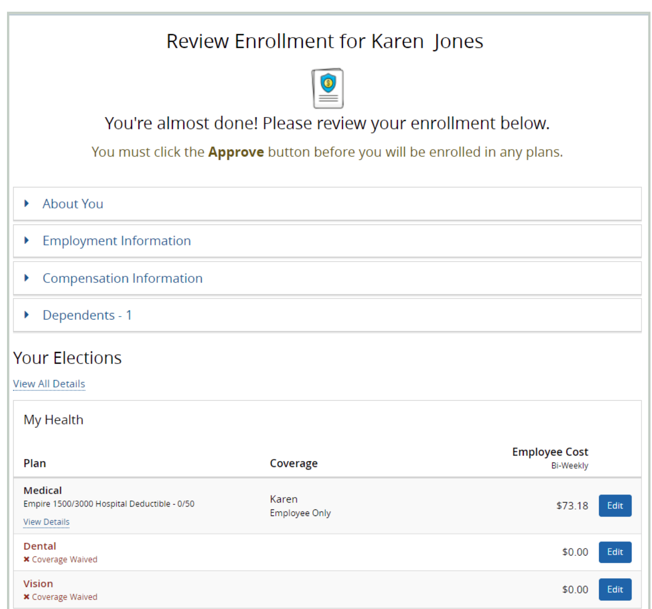
10. Proceed similarly through all other coverages.



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

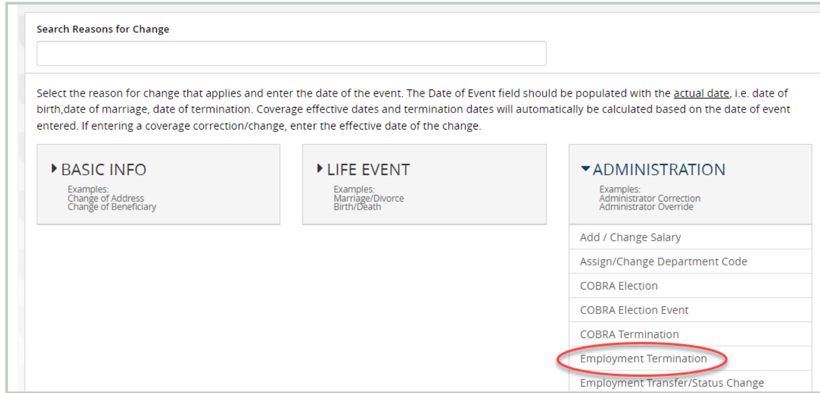
12. Scroll to the bottom of the screen and select Next to the Transaction Complete screen, where you will see a Confirmation Number.

    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.

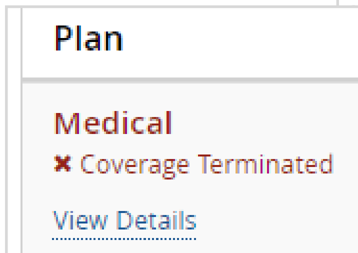


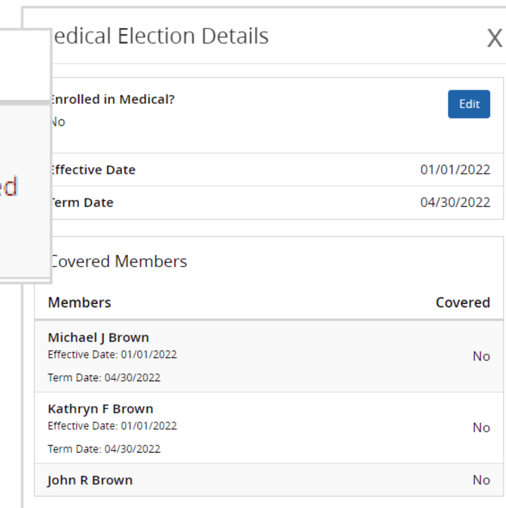
Terminate an Employee

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.

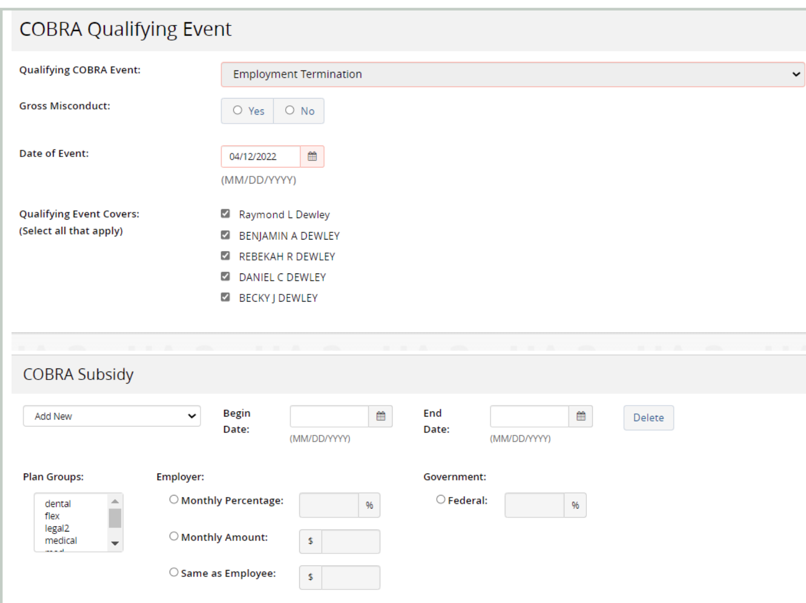


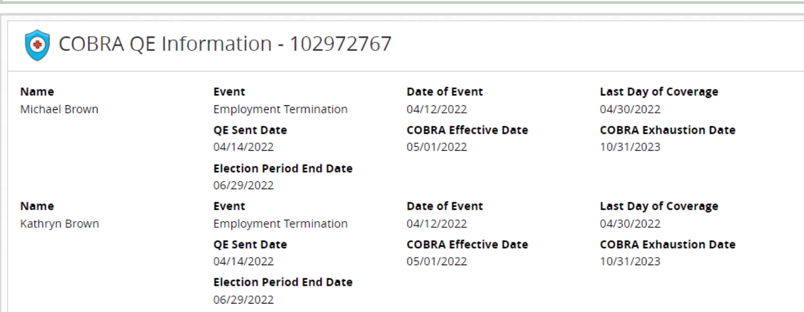
5. Click the View Details under any coverage to see the Termination date of the plan by member.





6. Scroll down and select Approve.





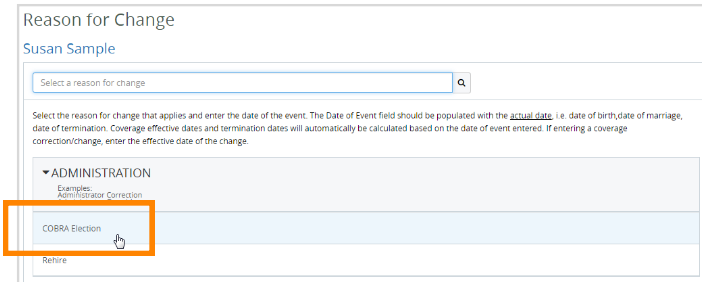
7. If any of the terminated plans are eligible for COBRA, the Qualifying COBRA Event screen will appear. Indicate if the termination reason is or is not due to gross misconduct.
8. Click Next to complete the termination, print the new benefit summary, add a note to the member's record or search from 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

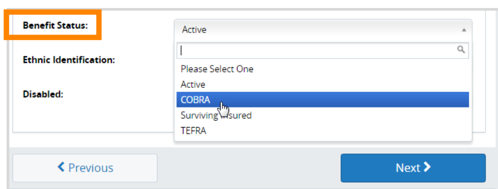
If you use a third party COBRA Administrator, there are some additional steps required after processing an employment termination, to ensure any participant-elected plans are reinstated.

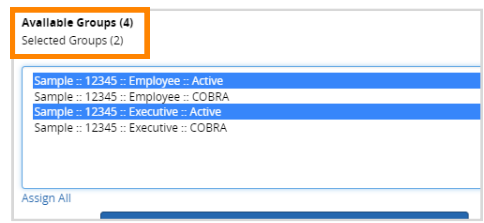
1. Process an Employment Termination, as usual.
2. Once the Qualifying Beneficiary has paid, add COBRA by opening the member's record.

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

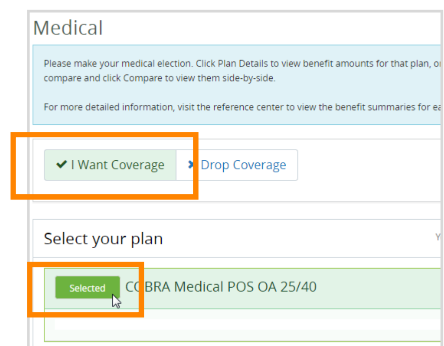


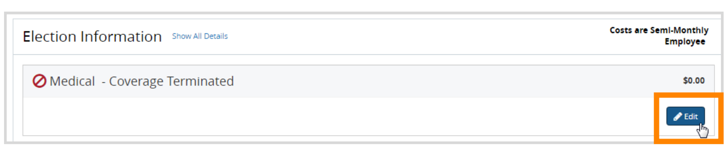
3. Change the Benefit Status in the Personal Information section to "COBRA," and change the Structure Group in the Employment Information section to the appropriate COBRA structure group.



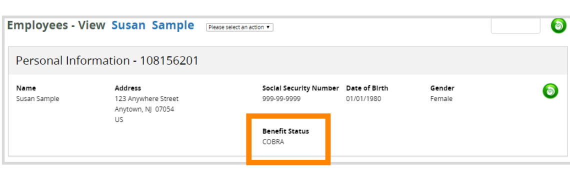


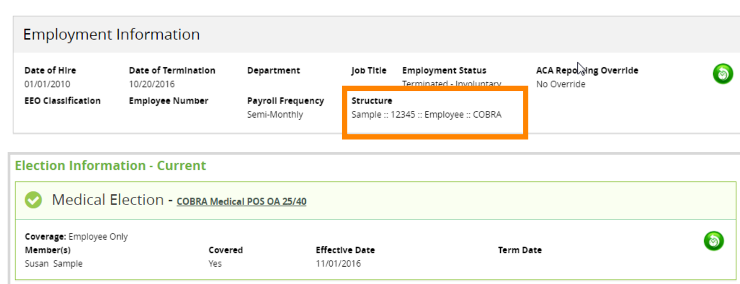
4. Add the elected COBRA plans by clicking Edit in the Election Information section then click Approve at the bottom of the screen. If you do not click Approve, your changes will not be processed.





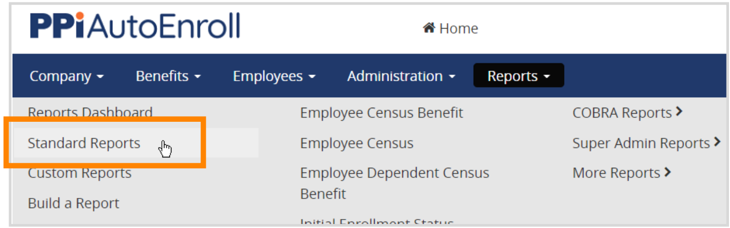
5. The member record should now reflect these changes.





How to Run Reports

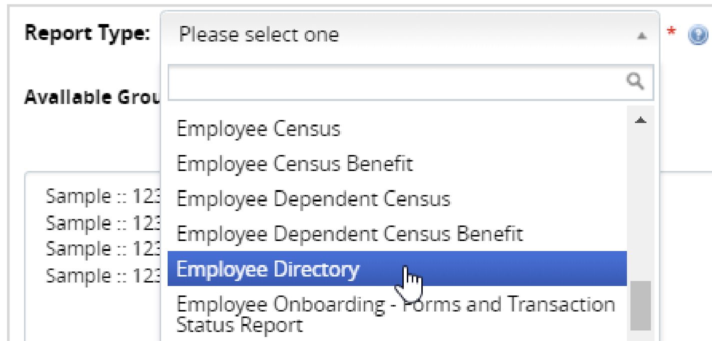
1. Click on the “Reports” button in the navigation toolbar.
2. Select a report from the options, or click on “Standard Reports.”



3. Select a report from the “Report Type” dropdown menu.

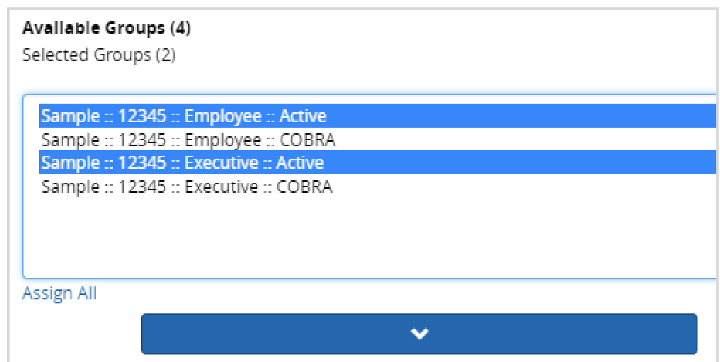
   An “advanced” link is available for some reports and allows you to select fields to include in the report.

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



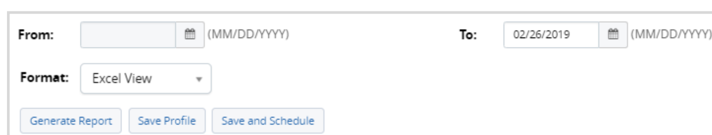
4. Select the structure groups to include in the report, and use the up and down bars to move them from the Available Groups box into the Selected Groups box.

   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.

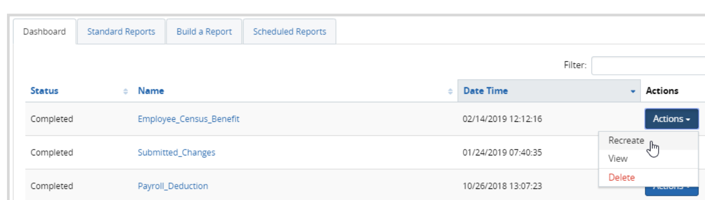


5. Fill in the “To” date, which is the point in time at which the data reported will end. The system defaults this field to the current date if nothing is entered.

   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.



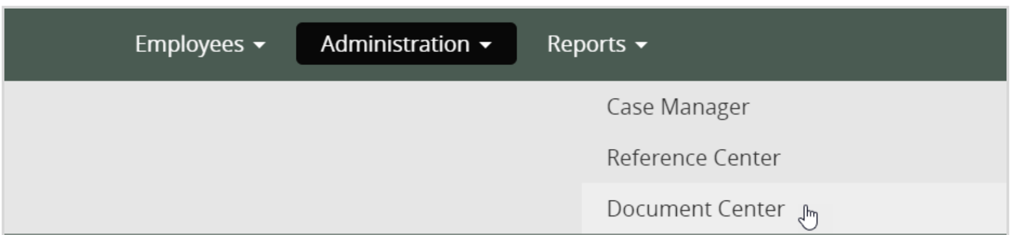
COBRA Premium Report

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.

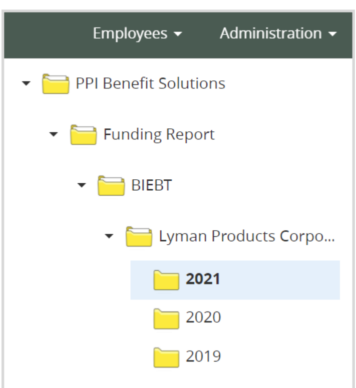
COBRA Premium Reports are available after the 10th of the month, after premium is collected from participants.

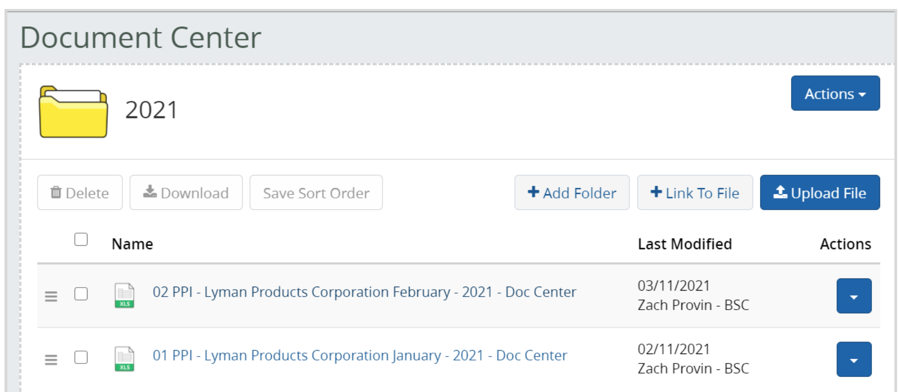
To Access the COBRA Premium Report:

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 form 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:





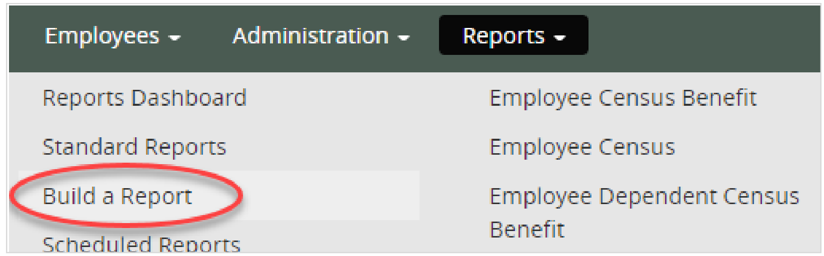
3. Click on the report name to download and open the report.

Build-A-Report

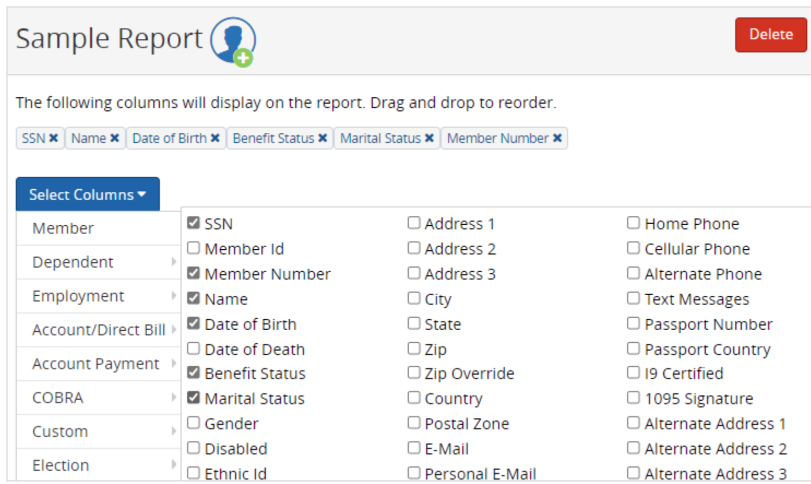
Build a Report makes it quick and easy to create custom-built reports with a multitude of field options that allow you to control the final output rather than relying on more rigid standard formats such as the Employee Census Benefit (ECB).

Start a New Report:

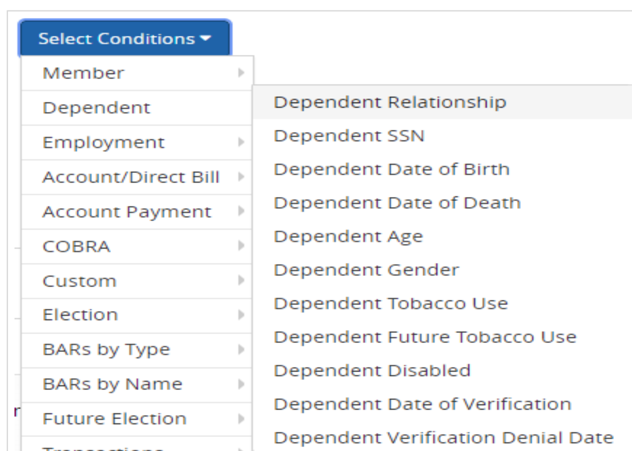
1. Navigate to Reports > Build a Report.
2. On the Administration - Reports, click +New Report in the blue bar.
3. Enter a name for the report and click Submit.



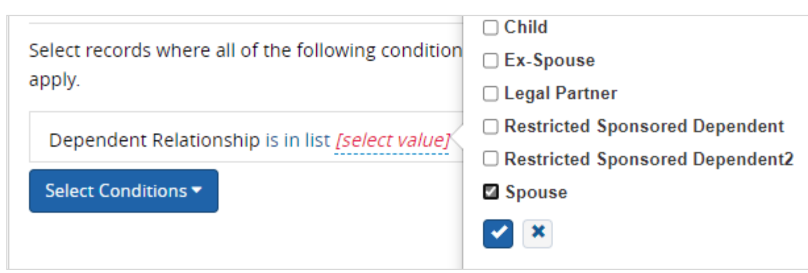
4. Click Select Columns to display column options for the report.
5. Hover over the options to select fields to include in your report, and repeat as necessary.



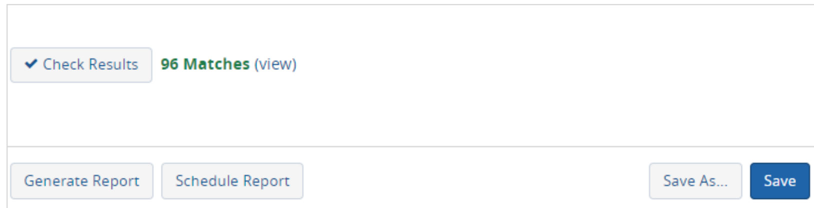
6. Click Select Conditions to filter which member records will display in the rows of the report.
7. Hover over a main condition category to display options for that condition.



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.