Open Enrollment is Near!

Please review the following checklist to help you prepare for a successful online open enrollment period this year.

PRE-ENROLLMENT — Plan Ahead

ONLINE OPEN ENROLLMENT SETUP TIME

- **New clients or clients making plan or carrier changes can take 15-20 business days** from the date PPI receives all finalized decisions including all the appropriate signed paperwork.
- **Existing clients who have only rate and contribution updates can take up to 10 business days** to complete.
- **All plans will be effective on the same date.** Coverage(s) that renew on a different date or follow a separate benefit plan year schedule will not be included.
- **HSA and FSA plans MUST be re-elected annually.** Current year contributions will not carrier over into the new benefit plan year.

RUN AN EMPLOYEE CENSUS BENEFIT (ECB) REPORT

Prior to your open enrollment start date, run an ECB report in AutoEnroll. Check to ensure the following information is correct and up to date:

- **Salary** is current for all employees if you have salary based plans
- **Payroll Frequency** is designated correctly for all active employees
- **Terminated Employees** have a termination date
- **Rehires** have termination date removed

ENROLLMENT — Monitor Activity

REGISTERING AS FIRST-TIME USER

Instructions are available for you to distribute to your employees. The *How to Enroll* user guide is housed in the **Administrative Tips and Guidance/SelfEnroll Client** folder in the AutoEnroll Reference Center.

OPEN ENROLLMENT STATUS REPORT

You can run this report anytime during open enrollment to see which employees have and have not logged into the portal to enroll. **To run this report for your active structure groups, enter the date your online enrollment began.**

NOTE: *This report tracks open enrollment activity initiated by the employee, not transactions performed by an administrator on behalf of an employee.*

RETURNING USER INSTRUCTIONS

Employees who have forgotten their username and/or password can also refer to the *How to Enroll* guide for assistance. Employees will need to answer the security question(s) they selected when they initially registered. Client administrators can assist with username or password issues by referencing the *User Login Assistance* guide.

PPI CLIENT SERVICE TEAM

Employees needing assistance with portal registration or navigation can call the Client Service Team:

Toll Free Number (888) 674- 0046 **Email** clientservices@ppibenefits.com

Our contact information is also located on the AutoEnroll login page and included in the How to Enroll guide.

POST-ENROLLMENT — Run Reports

PAYROLL DEDUCTION REPORTS

Employee elections and contributions are viewable from a Payroll Deduction Audit (full file) or a Payroll Deduction Change (changes only) Report from AutoEnroll. These are the only reports that include payroll deductions for all contributory plans. We recommend you run the **full** report after open enrollment closes.

To run the report for your active structure groups, use the date your online open enrollment began in the "From" field and the effective date of benefits in the "To" field.

Please note the following:

1. Both coverages elected AND termed will appear on this report. You can sort and/or remove elections on the Excel spreadsheet however you deem necessary for your reporting purposes.
2. If you made plan or carrier changes and PPI mass moved employees to the new coverage equivalents, both the termed plan and the new election will show on the reports.

PPi BENEFIT SOLUTIONS
Benefits. Technology. Heart.