Update Employer Information Page and Customer Account Page

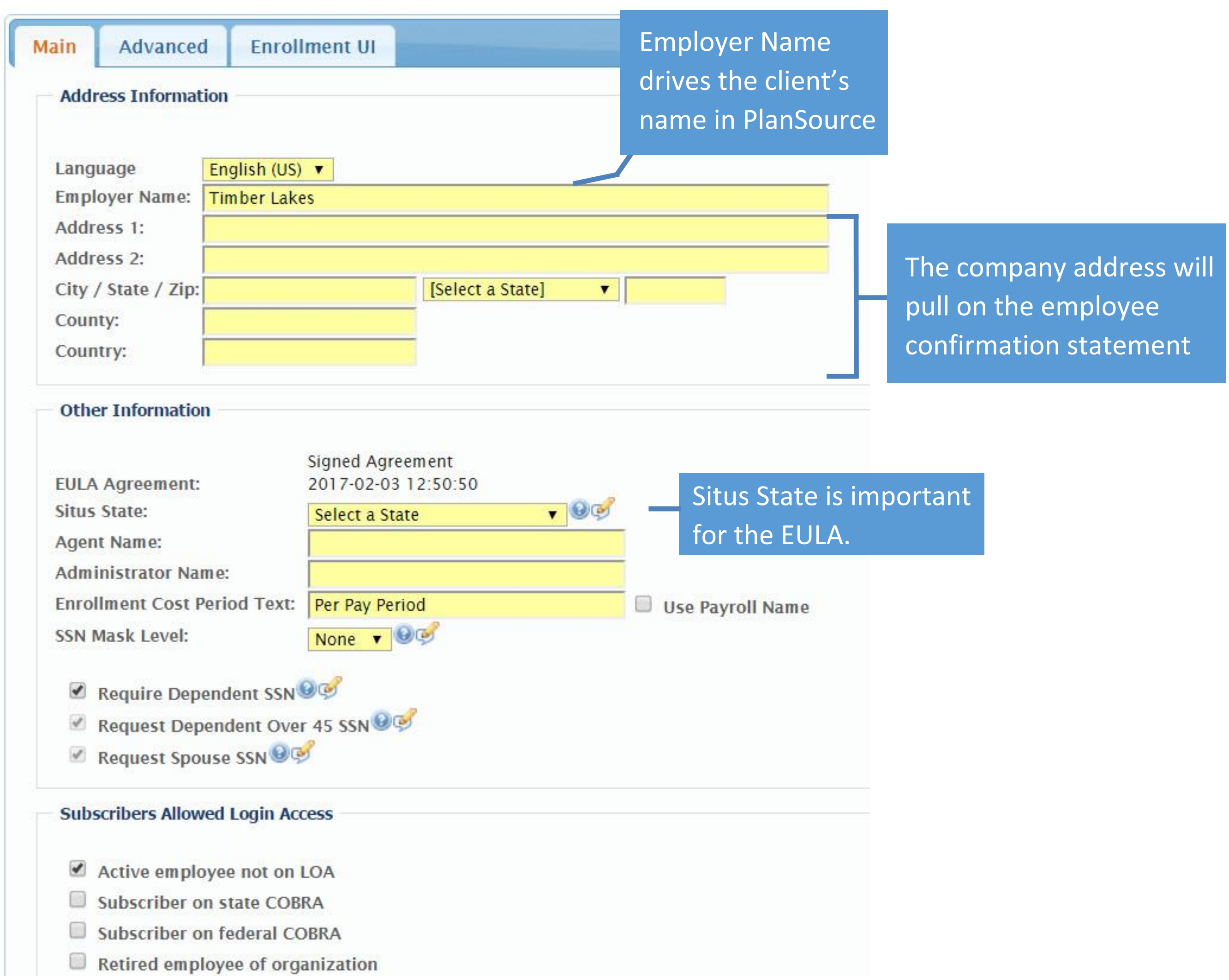
Employer Information Page

Employer Information is the first step under the Configuration tab. It is separated into three sections with a link to the customer account page at the bottom of each section.

Main Tab

The main tab contains the demographic information for the client, contacts and enrollment options.

All fields should be completed. Information regarding the significance of certain items is noted.

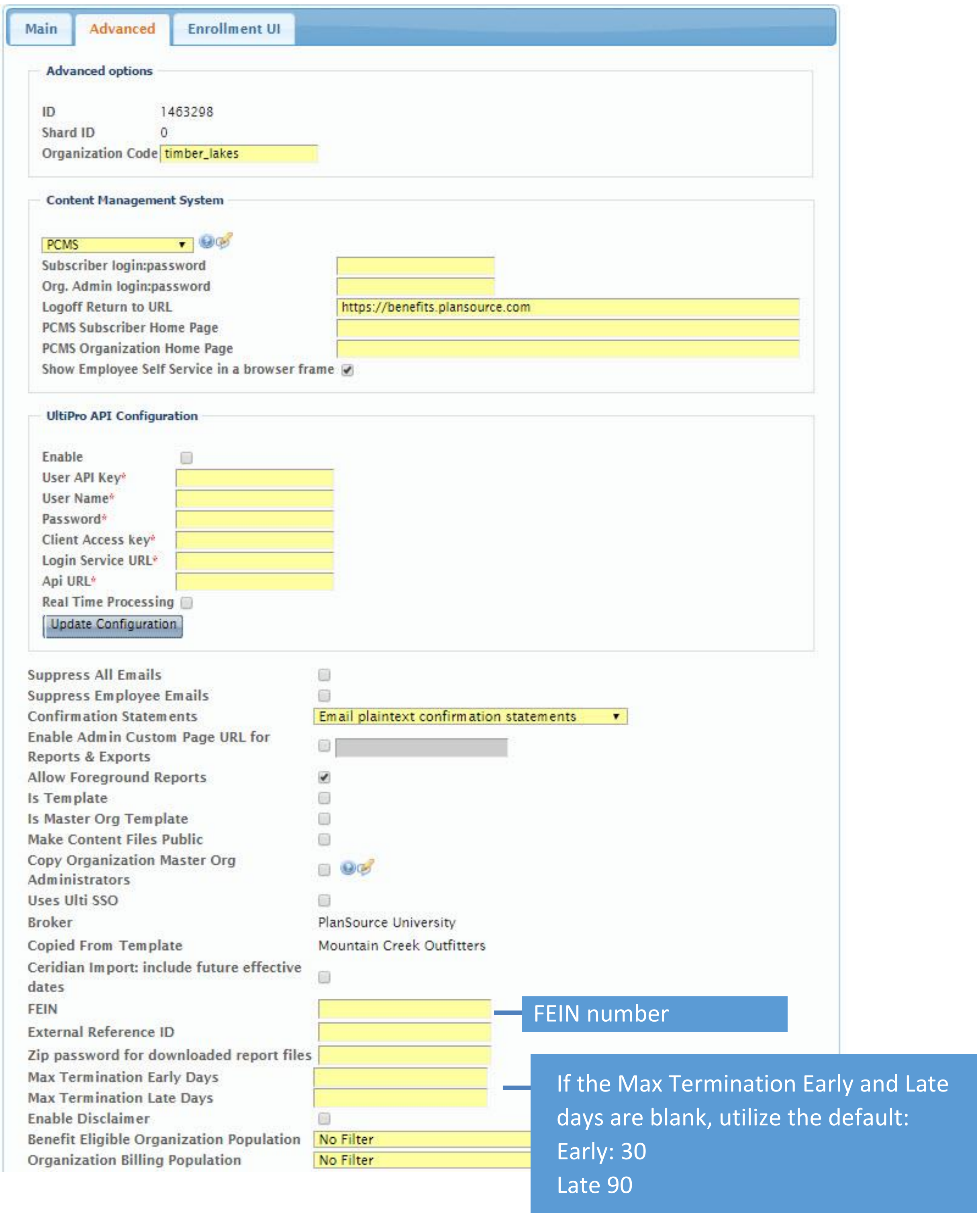


Advanced Tab

The advanced tab is utilized to further customize the platform for the client.

The defaulted options are checked and the configuration analyst will adjust items if needed.

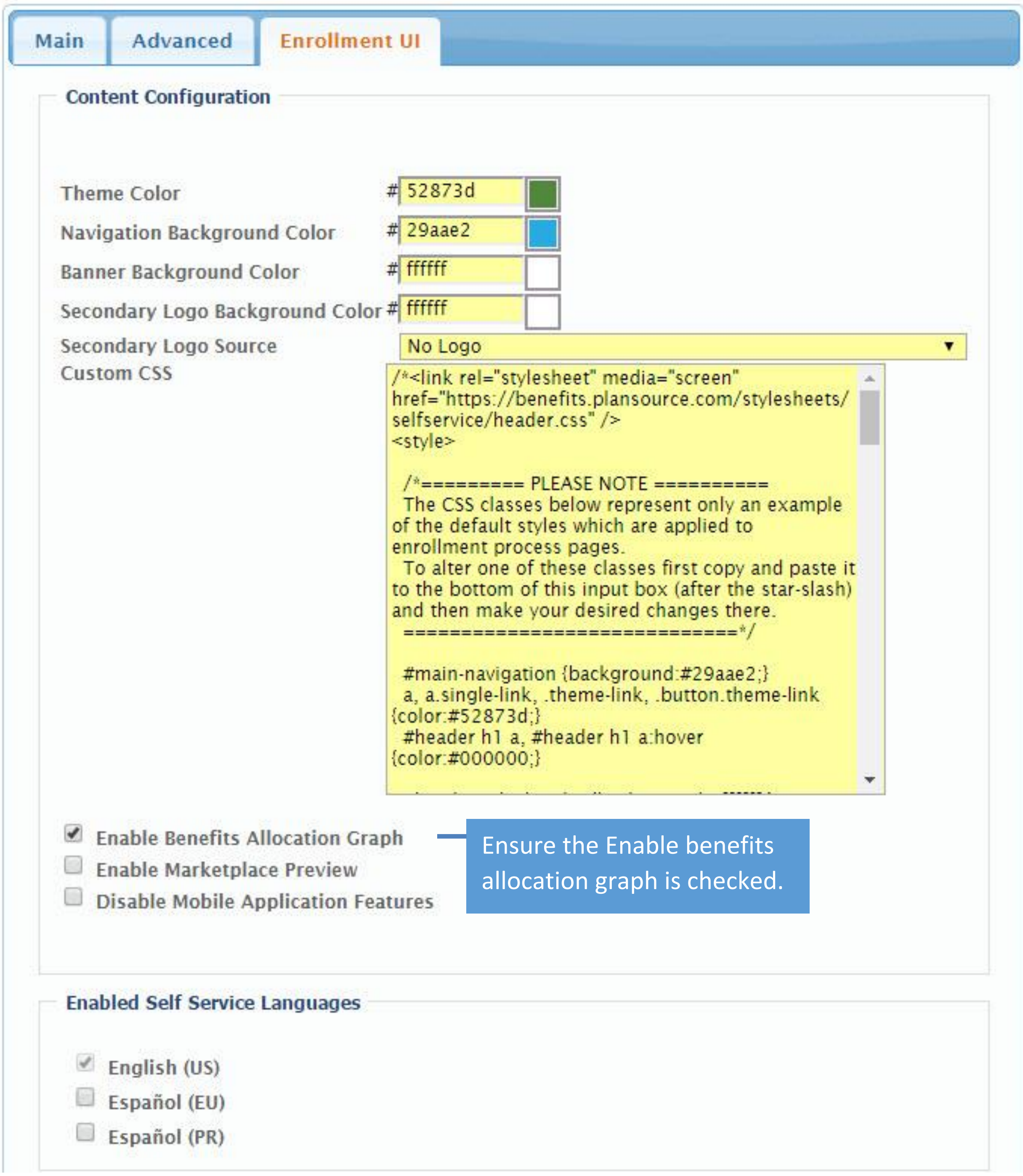
The project manager will complete two items on this page. The FEIN number and the max termination early and late days. Both are located toward the bottom of the page.



Enrollment UI Tab

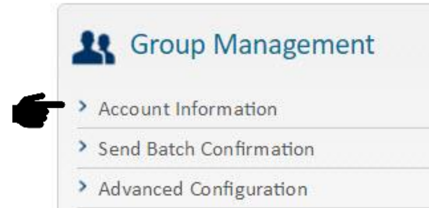
The enrollment UI tab will designate the branding colors for the client, enable the allocation graph and turn on the Spanish feature.

There is only one item for the project manager to update. Ensue the Benefits allocation graph is checked.



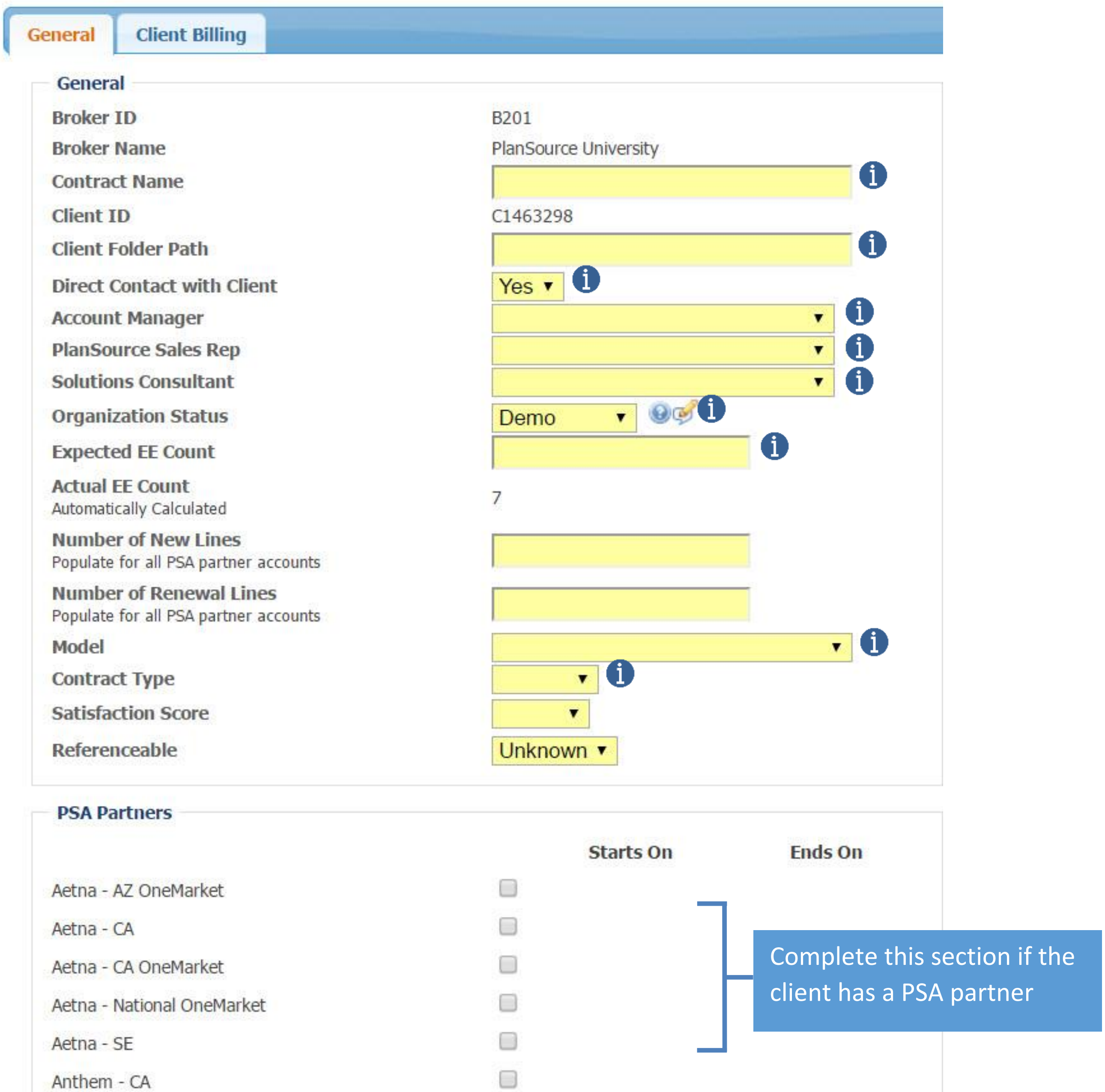
Customer Account Information Page

The customer account information page can be accessed from the home page under Group Management. It is also located at the bottom of any of the three tabs under Employer Information.



Information to be updated

Required fields are designated with



Customer Account Information Page Continued

Implementation

Setup Done By	
Implementation specialist	
Implementation Start Date	
Target Go Live Date	
Revised Target Go Live Date	
Actual Go Live Date	
Live for Annual Enrollment	Yes
Broker On-Boarding Complexity	
Implementation Complexity	
Renewal Complexity	
Date Implementation went on Hold	
Expected Ongoing Transition Date	
Actual Transition Date To be completed by Service Team Manager	

This field is updated after the kick off call

Fees

Setup fee	
Setup fee billed on To be completed by Billing Specialist	

System Functionality Utilized

- Employee Self Service
- InfoCenter (Customized Content)
- New Hire Processing
- Plan Comparisons
- Premium Billing
- Work Status Events

Other Products

		Starts On	Ends On
Aflac			
Allstate			
Ben Admin - NGE			
COBRA - AHA			
COBRA - Igoe			

Complete this section if the client is utilizing additional products.