

Setting Up a New Plan

What you will need:

The information you need for building a plan will vary depending on the benefit type, however below are a few of the essentials:

- **Eligibility rules:** Who is eligible? What are your waiting periods?
- **Basic benefit coverage information:** Deductibles, co-pays, etc.
- **Monthly carrier rates**
- **Employer/employee monthly contribution.**

To set up a new plan navigate to **Plans** from the left navigation bar and then select **Add Plan** on the right.

Plans

Search plans

Status ☒ Active ☐ Inactive ☐ Expired [Change Product Order](#)

Medical

Plan Name	Carrier	Effective Date	Eligible / Enrolled	Status	Actions
Test Medical	AIG (American International Group)	04/01/2025 - 03/31/2026	16 / -	Active	
Medical test	AIG (American International Group)	04/01/2025 - 03/31/2026	33 / 1	Active	
MedicalNT-809	ARC Administrators	02/15/2025 - 02/14/2026	170 / 3	Active	
Aetna 2024-2028	Aetna	01/01/2024 - 12/31/2028	170 / 11	Active	
Tobacco Plan	ARC Administrators	01/01/2025 - 12/31/2025	38 / -	Active	

Health Savings Account (HSA)

Plan Name	Carrier	Effective Date	Eligible / Enrolled	Status	Actions
HSA Plan	ARC Administrators	05/01/2025 - 04/30/2026	32 / 1	Active	

You have several options for adding a plan.

- **Create New Plan**
- **Renew Plan**
- **Copy Plan**
- **Add Plan From System Library**

Add a Plan

Create New Plan

Renew Plan

Copy Plan

Add Plan From System Library

1. **Option 1:** Create a New Plan.

Create a New Plan

Product Type *

Accident

Carrier/Provider*

Select

Plan Name *

Effective Start Date *

MM/DD/YYYY

Effective End Date *

MM/DD/YYYY

Policy Anniversary Month *

Select

Request New Carrier

Cancel

Save & Continue

2. **Option 2:** If plan contributions are identical across all plans, where the only changes are plan details, coverage, and plan rates, you can save time on plan set up by copying an existing plan and making necessary changes to the plan details.

Copy Plan

×

Product Type *

Medical

▼

Plan *

Medical test

▼

New Plan Policy Info

Carrier/Provider*

AIG (American International Group)

▼

[Request New Carrier](#)

Plan Name *

Medical test - Copy

Internal Plan Name/ID

Group Number

Subgroup Number

Plan Type

Select

▼

☐ This is a High Deductible Health Plan. Employees enrolled in this plan may also be eligible to enroll in an HSA and Limited Purpose FSA.

Level

Select

▼

Effective Start Date *

MM/DD/YYYY

Effective End Date *

MM/DD/YYYY

Policy Anniversary Month *

Select

▼

Plan Details to Include with Copy

Eligibility

Rates

Contributions

Coverage

Riders

Payroll

Additional Settings

Resources

Disclosures

Underwriting Questions

Cancel

Save & Continue

3. **Save & continue** to establish the plan “shell”

4. Continue filling in the required information for each tab, being sure to click **Save & Next** at the bottom of each screen.
5. The **Summary** tab will display red exclamation points next to incomplete sections.
6. When all sections complete and the Summary tab indicates all green check marks, click **Activate**. Eligible employees will now be able to enroll in this plan when they have an unlocked enrollment window.

IMPORTANT NOTE: Once an employee has enrolled in the plan, the plan set up will lock and you will not be able to make any changes to the plan

MEDICAL TEST - COPY

Policy Info Eligibility Coverage Rates Contributions Additional Settings Riders Resources Payroll **Summary**

ⓘ Warning! Plan eligibility rules, rates, contributions, and/or coverage amounts will be locked from changes once the plan is activated and at least one employee enrolls, as changes may impact existing enrollment records. Please review plan setup carefully before activating.

Summary

0 ENROLLED 0 ELIGIBLE **Activate**

- ✓ Policy Info >
- ✓ Eligibility >
- ✓ Coverage >
- ✓ Rates >
- ✓ Contributions >
- ✓ Additional Settings >
- ✓ Riders >
- ✓ Resources >
- ✓ Payroll >