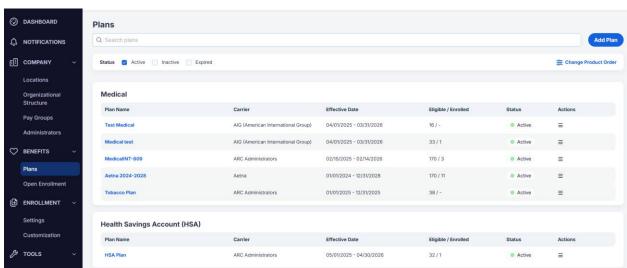
Setting Up a New Plan

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:

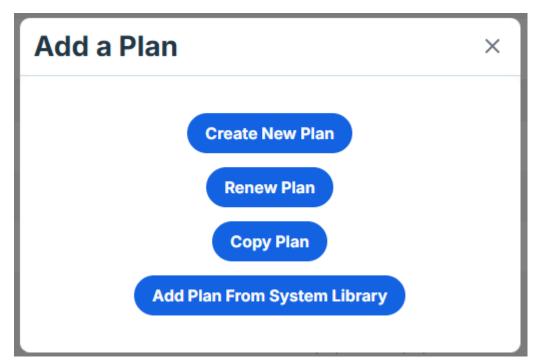
- Eligibility rules: Who is eligible? What are your waiting periods?
- Basic benefit coverage information: Deductibles, co-pays, etc.
- Monthly carrier rates
- Employer/employee monthly contribution.

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

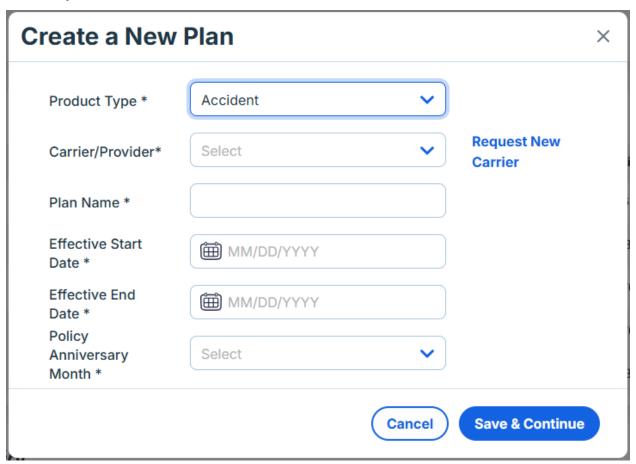


You have several options for adding a plan.

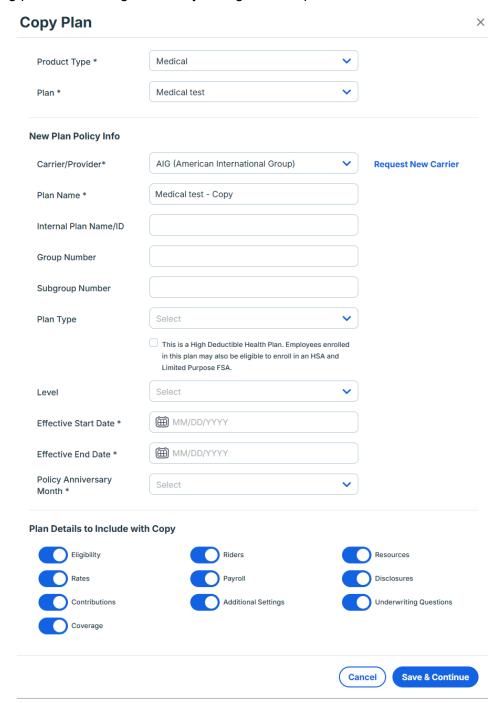
- Create New Plan
- Renew Plan
- Copy Plan
- Add Plan From System Library



1. Option 1: Create a New Plan.



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.



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.
- 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 Eliaibility Coverage Rates Contributions Additional Settings Riders Resources Pavroll 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 Activate Q 0 % ENROLLED 0 % ELIGIBLE Policy Info **⊘** Eligibility **⊘** Coverage **⊘** Rates Contributions > Additional Settings **⊘** Riders Resources Payroll