Word&Brown

EASE RENEWAL GUIDE
FOR EXISTING EASE GROUPS

When it comes time for your groups to renew, we wanted to make sure you have everything you need for a smooth experience. To ensure that happens, we're sharing what you need to know about getting your groups renewed.

This document contains links to Ease support articles. You must be logged in to Ease to view these.

Loading Renewal Plans/Rates into Ease

- Send accountmanagement@wordandbrown.com items below to load into Ease:
  - Fully completed Intake Form
  - Confirm census is accurate in Ease; if updates are needed, broker/employer to add any missing employees into Ease census
  - Medical Quote/Renewal
  - SBCs for Large Groups
  - Employee Worksheets for Small Group Plan Eligibility (can be requested from Word & Brown Sales)
  - Ancillary rates and benefit summary

Open Enrollment

- Broker/Group to push emails out to employees or notify Word & Brown Account Management of when to send the emails
- Broker/Group to monitor Ease for Open Enrollment (OE) progress and advise once completed

Open Enrollment Complete

- Once OE is complete, select the appropriate plans under the benefits tab.

For plans with no marketplace connection:

- Broker/Group to generate Open Enrollment Changes Report from Ease, identifying changes to be communicated to carrier at Open Enrollment. Best practice is to generate a separate report for each plan type. **Change forms include demographic information only, and the actual change occurring (e.g., changing from plan A to plan B, or dropping a dependent), which needs to be manually completed.**
  Note: This only applies to groups who have used Ease to enroll in the previous year.
- For new employee enrollments during OE, enrollment form will need to be pulled. Forms should be reviewed for completeness, and updated as necessary.
- Once forms have been reviewed by Broker/Group, change forms and/or new enrollment forms should be sent to the carrier (or updated on carrier portal) or sent to Word & Brown Account Management for processing.

For plans with an EaseConnect+ Marketplace connection:

- Click on the “Actions” button and hit “Ready to Submit.” This will notify Ease that a group has completed OE and that the plans are ready to be connected to the partner. No data will be transmitted to partners or carriers until Ease has received the “Ready to Submit” alert and completed a final review and/or other actions.
- There may be a gap period between when enrollment is completed and when the new plans begin. In this instance, you will want to make sure any changes made are sent to the carrier manually.
- Once renewal file is sent to the partner, any additions/changes/terminations to current year plans need to be processed manually with the partner through the end of the plan year.
  - » Go to **To-Dos > Changes > Manage** for details on transactions that require manual processing.
- For COBRA-Eligible Plans, if enrollment has been renewed (duplicated and pushed) to a new plan for a terminated employee (termination date added after enrollment), COBRA information must be manually submitted to the vendor.
- To ensure enrollments are correct, **on a monthly basis, reconcile Ease data with carrier data**; see Reconcile Ease with Carrier Invoice.
- For further assistance, please submit a support Request/Ticket by clicking here.

Ongoing Maintenance Transactions

EaseConnect+

- Ongoing maintenance transactions will be sent directly to the carrier. Please review invoicing to confirm changes are all submitted correctly.
- For further assistance, contact please submit a support Request/Ticket by clicking here.

No Marketplace Connect

- Broker/Group to monitor any ongoing maintenance transactions (adds/terms/qualifying event/demographic changes) and pull the form(s) to submit to the carrier (or via the carrier portal) or to Word & Brown Account Management for processing.
  - Go to **To-Dos > Changes > Manage** for details on transactions that require manual processing.
  - Change forms include demographic information only, and the actual change occurring (e.g., changing from plan A to plan B, or dropping a dependent), which needs to be manually completed.

Support

If you have a question on setting up or utilizing Ease, send an email to accountmanagement@wordandbrown.com.

If you have a question on EaseConnect+ or troubleshooting integrations, please submit a support Request/Ticket by clicking here.