



# Company Administrator Guide

Ease allows employers to manage employee benefits, onboarding, and compliance in one central location. The Ease solution makes the process of communicating, managing and enrolling your employee benefits easy. Newly hired employees can view and complete their required documents and enroll in all benefit plans in one place.

**Note:** To access support solutions via the links below, log in to Ease and choose **Support** from your User Menu in the top right corner under the profile icon.

## COMPANY

- Profile  
Create and populate insurance carrier and ACA IRS--ready forms that require employer data  
[Company > Profile > General](#)
  
- Organization  
When applicable, benefit eligibility can be determined based on organization types  
[Company > Profile > Organization > Locations, Divisions, Departments, and Job Classes](#)
  
- Pay Schedules  
Automate remaining deductions, and track hours for ACA, and time-off accruals in HRIS  
[Company > Payroll > Pay Schedules > Add Pay Schedule](#)
  
- Email Templates  
Create and manage templates to be used when communicating with employees  
[Company > Settings > Email Templates](#)

## EMPLOYEES

- Add Employee  
Add individual employees  
[Employees > Actions > Add Employee](#)
  
- Update Employee  
Update employee information  
[Employee > Profile](#)

- Profile  
Employee personal demographic and contact information  
[Employee > Profile > Personal](#)
- Employment  
Details of employment to include organization types and compensation  
[Employee > Profile > Employment](#)
- Benefits  
Assist with enrollment, provide summaries and statements, and add other coverage or advanced settings  
[Employee > Benefits](#)
- Documents  
Add/maintain employee documents  
[Employee > Documents](#)
- Login
  - Send Login  
Send login information to employee(s)  
[Company > Logins > Logins > Actions > Send Logins](#)
  - Reset Password  
Reset employee password  
[Employee > Profile > Login > Reset Password](#)
- Import Employees  
Import employee demographic, employment and/or enrollment information  
[Company > Employees > Actions > Import Employees](#)
- Terminate Employee  
Add date and details for employee termination  
[Employee > Employment > Details](#)
  - COBRA  
Transition employee from terminated to COBRA  
[Employee > Enrollment > Details](#)

## DOCUMENTS

- Library  
Add and organize documents available to all employees  
[Company > Documents > Library > Actions > Add Document, Link or Folder](#)
  
- Onboarding  
Add documents and links for employees during onboarding.  
[Company > Documents > Onboarding > Actions > Add Document, Link or Custom Document](#)
  
- Notifications  
Add documents and links for which notification to employees is desired/necessary  
[Company > Documents > Notifications > Actions > Add Document, Link or Custom Document](#)
  
- Custom
  - Create Custom Document  
Create a document with custom text and/or fields from Ease  
[Company > Documents > Custom > Add Document](#)
  
  - Add Custom Document to Library  
Add a custom document to Onboarding or Notifications  
[Company > Documents > Onboarding or Notification > Actions > Add Custom Document](#)
  
- Send Document Review Reminders  
Send emails to employees that have not reviewed or signed required documents  
[Company > Documents > Library > Actions > Message Employees](#)

## **BENEFITS**

- Plans  
View benefit plan information  
[Company > Benefits > Plans > \[plan\]](#)
  
- Progress
  - Enrollment Progress  
Track and manage enrollment progress  
[Company > Benefits > Progress > Enrollment Progress](#)
  
  - Onboarding Progress  
View onboarding progress for new hire employees  
[Company > Benefits > Progress > Onboarding Progress](#)

- Message Employees**  
Send an email message to new hires/enrollees that have not finished  
[Company > Benefits > Progress > Actions > Message Employees](#)
  
- Open Enrollment**  
Manage benefits with Ease  
[Company > Benefits > Open Enrollment](#)
  
- Lock Enrollment**  
Lock and unlock enrollment for the employee  
[Company > Benefits > Lock Enrollment](#)
  
- Statements**  
Generate a compensation statement for an individual employee  
[Employee > Benefits > Statement > Generate Statement](#)  
Generate statements for all employees  
[Reports > Available > Compensation Statements](#)
  
- Qualifying Life Events**  
Create a qualifying event to allow for changes to benefit elections for an employee outside New Hire or Open Enrollment  
[Employee > Benefits > Actions > Add Qualifying Event](#)
  
- Terminate**  
Terminate benefits due to employment change or qualifying event  
[Employee > Benefits > Actions > Terminate Benefits](#)
  - Reinstate Benefits**  
Reinstate employee's benefits eligibility  
[Employee > Benefits > Actions > Reinstate Benefits](#)
  
- Benefit Effective Date Override**  
Correct/change benefit effective date using Effective Override  
[Employee > Benefits > Enrollment > Administration](#)

## **MANAGE CHANGES**

- Changes**  
Options for managing demographic and enrollment changes in your company site.  
[Company > Reports > Changes > Manage](#)
  
- Pending Elections**

Information about how unsigned elections are handled in Ease.

[Company > Reports > Changes > Manage > Pending - Elections \(Not Signed\)](#)

## REPORTS

**Generated**

All reports generated throughout Ease are accessed here

[Reports > Generated](#)

**Available**

Produce and access reports available in a company site

[Reports > Available](#)

**Employee**

Reports that provide employment related information for employees

[Reports > Available > Category = Employee](#)

**Benefits**

Reports that provide benefits/enrollment data

[Reports > Available > Category = Benefits](#)

**Feedback**

Feedback provided by employees during onboarding and/or enrollment

[Reports > Feedback](#)

## EMPLOYEE RESOURCES

Download and provide the following to your employees:

- [Employee Enrollment at a Glance \(English\)](#)
- [Employee Enrollment at a Glance \(Spanish\)](#)
- [Employee Enrollment Experience \(English\)](#)
- [Employee Enrollment Experience \(Spanish\)](#)