



DISCOVERY

Q#1

- Do you provide your client's a solution for enrollment technology?
- Are you currently building cases on an independent ben admin system like Ease or Employee Navigator? **If so, who is handling your data exchange, integration and life event management with the carriers?**

Q#2

- Did you find that a lot of your open enrollments returned to onsite for this past open enrollment season? What were some of the changes that you saw vs. The pre-pandemic environment?

Q#3

- What has been your experience been with conducting enrollments in this virtual environment?
- Do you have a virtual enrollment solution for enrollment (core enrollment)?

Q#4

Discovery

Have you had experience with enrollment firms or enrollment partners?

- If yes, what has a good experience consisted of?
- If no, what were some of the issues you experienced?
- What are some key things that you look for in an enrollment partner?

Q#5

- Would you be interested in learning about digital and print communication tools for core, ancillary and voluntary benefits that can be customized to each client engagement?
- Do you have clients that you feel might benefit from better engagement and communication of core benefits and to assist with delivering communication to assist with annual review and change management?

Q#6

- Does your agency have any particular targets or goals that you have identified for 2023?
- **Aflac's Broker channel has built a partnership with a TPA that will provide enrollment technology, assists with project management and case management of core enrollment, including communication and virtual capabilities, and has additional solutions available such as COBRA and consolidated billing. Aflac is subsidizing many of these solutions through a partnership with Ep6ix, an approved partner of Aflac. Would you have availability for a demo and an introduction?**

Email Intro

- **Ep6ix**
 - Agnostic to carriers and enrollment platforms
 - Virtual enrollment app for communication, scheduling, screenshare meetings and virtual call center
 - Preferred subsidy arrangements with certain carriers
 - Approach to enrollment is to deliver benefit strategy and education using the best Benefit Counselors in the industry
 - Intensive training on core benefits for all Benefit Counselors
 - Intensive training on the benefits and strategies specific to the client
 - Development of a custom communication plan using mobile enabled tools and any combination of call center and virtual screenshare meeting/consult options
 - Execution and Experience – 15 years of executing core enrollments
 - Key partnerships including TPAs, Technology, Compliance, Billing Solutions, etc
- **1100 Benefit Counselors** who are trained holistically on core/health education
 - Credentialed and Rated Benefit Counselors (app that requests rating from employee following each consultation)
 - Spanish Speaking and additional language support as well
 - New Hire On-boarding
 - Case Training for each case



Email Intro

- **Case Management**

- Daily Status calls and Group Communication app provide visibility throughout enrollment
- Case Managers who work with you, your Account Execs and the client on enrollment and implementation setup
- Project Plan and Implementation Timeline create visibility and execution throughout the pre-enrollment, communication, enrollment and post enrollment timeline
- Scrub all files against election forms for data integrity before sending to carrier/broker
- Custom Survey – pushed out via texting app – **Visibility into enrollment experience and Accountability for Benefit Counselors**

- **Mobile Enabled Communication Plan and App**

- Custom Communication plan (template that is updated and branded for each client and enrollment)
- Ringless Voicemail
- Texting & Push notifications (as well as email)
- Schedule Links
- Custom Videos (samples for review)
 - <https://ep6ix.vids.io/videos/799cd7be101de2cdf0/cascades>
 - https://bit.ly/ICG_Benefits
 - <https://ep6ix.vids.io/videos/ac9cd9b71918e8cd25/atrium-living-mp4>
- Custom Posters and Postcards
- Communication Center in App
 - Allows for posting of Benefit Guide,



Email Intro

- Virtual Call Center and Screenshare meetings – hybrid
 - Setup of Virtual Call Center with Screenshare meeting option
 - Use of Custom video and scheduling tool to go out via texting app
- Bene Admin System (if needed)
 - Ability to work across all platforms: cases in 2020 on Ultipro, ADP, Paycom, Paylocity, Bswift, Ease, Employee Navigator, IES, Benefit Harbor and more
 - **OPTION: Full build-out on Employee Navigator with EDI feeds for all carriers** (this will help with bill reconciliation and adds/terms/deletes) and **payroll integration**
 - **Ability to integrate with ADP using custom feed using multi-tenet demographic file upload on daily basis**
 - **OPTION: Build cases on your Ease license as well.**
 - Deduction reports in layout needed for auto upload of deductions
 - Can import current plans with data provided from carrier eligibility files or benefit census
 - Benefit Statements created for all employees

