



# CASE STUDY

## PLATFORM, COMMUNICATION & ENROLLMENT



- Engineering and Manufacturing
- 874 benefit eligible employees
- Moving from ADP Totalsource (PEO) to traditional benefit offering

This client was moving from ADP Totalsource (PEO) to a traditional employer sponsored benefit offering that required a platform solution, employee engagement and enrollment in a new health plan offering along with new ancillary benefits. The transition required capturing a provider ID for the HMO plan and assisting with provider lookup and any transition of care, where needed. Ep6ix provided a platform solution and built the enrollment files in the carrier file layouts... ALL IN UNDER 2 WEEKS. The enrollment was supported with 7 onsite Benefit Counselors and 5 call center Benefit Counselors in multiple languages to support a diverse workforce. Additionally, Ep6ix is handling ongoing eligibility management and new hire onboarding for an interim period while also helping with the implementation and buildout of ADP Workforce Now.

**Challenge:** Client needed a platform solution last minute and education of benefits alongside carrier and plan design changes for the medical, ancillary and voluntary benefits.

### SOLUTION AND RESULTS



- Trained 12 Ep6ix Benefit Counselors to support core enrollment including carrier changes for the medical, dental, vision, ancillary and voluntary benefits.
- Built Employee Navigator with a complex eligibility and billing structure to accommodate all plans and multiple entities.
- Delivered all enrollment data to carriers and TPAs in their custom file layouts for employees to have their medical cards in time.
- Established access to carrier portals to manage ongoing new hire, QLEs and terms.
- Established ongoing deduction file layout to provide ongoing deduction changes.
- Provided custom communications including branded posters and scheduling tool to help facilitate onsite and virtual enrollment.



- **814 of 874** benefit eligible employees completed active enrollment with 85% seen by a Benefit Counselor
- **98%** approval rating of Benefit Counselors by employees
  - **151 of 154** employees gave their Benefit Counslors 5 stars ★★★★★

### ENROLLMENT BY THE NUMBERS



#### VOLUNTARY BENEFITS

- STD, Vol Life Insurance, Critical Illness and Accident
- **164** enrolled in STD
- **371** enrolled in Accident
- **285** enrolled in Critical Illness
- **422** enrolled in Vol Life Insurance



- **\$ 288,587** in Annual Premium
- **\$19,430** in Broker Commission (levelized)



#### DENTAL AND VISION

- **608** enrolled policies
- **20% increase over prior enrollment**



- **\$290,093** in Annual Premium
- **\$29,009** in Broker Commissions

### TOOLS TO ENHANCE VALUE & SUBSIDIZE COST

#### ACTIVE ENROLLMENT

Provided Benefit Counselor supported enrollment for both onsite and virtual including platform solution and management of enrollment data with a revenue share on the voluntary benefits.

#### VOLUNTARY BENEFIT OFFERING

Introduced 4 voluntary benefits including STD, voluntary life, critical illness and accident.

#### ANCILLARY BENEFITS

Ep6ix secured an override on the ancillary and voluntary benefits through MetLife to support platform build, ongoing eligibility management and new hire onboarding.