



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.