

- Remote Coding & Auditing Services
- Main office in Ft Meyers, FL
- 232 benefit eligible employees located across 38 states

Enrollment in prior years was completed by employees self-enrolling through the SmartBen platform. This year included a carrier change for the Medical, Dental & Vision plans. As well as a plan design change that eliminated one of the current medical plans. They were also moving away from the SmartBen platform and implementing ADP's benefit administration platform, however ADP was not able to accommodate building out all plans in time for open enrollment to take place. The client and broker partnered with Ep6ix to provide a one-time enrollment platform solution by building out all plans on the Enroll Confidently platform, with the delivery of custom enrollment files to the carriers. Ep6ix also provided a full-scale pre-communication plan, supported with trained and dedicated Benefit Counselors to facilitate education of the changes to the core benefits including a new voluntary benefit program featuring accident, hospital, critical illness, short-term disability and whole life options.

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



- Executed a full-scale digital communication plan via phone, text, email and video.
- Trained and prepared 5 Ep6ix Benefit Counselors to support core enrollment within the Enroll Confidently platform.
- Benefit Counselors supported virtual enrollments via video screenshare with call center as a backup.
- Utilized ep6enroll.app for communication and case management including Benefit Counselor rating reports and daily "Scheduled", "Completed" and "Not Scheduled" reports to the client.
- Provided enrollment platform for core and voluntary benefits for open enrollment, with platform remaining in place for voluntary benefits with feed to ADP for deduction setup.
- Provided enrollment, demographic and dependent data files from Enroll Confidently for import in ADP post enrollment.



- **82%** of eligible FT employees completed enrollment with a Benefit Counselor
- **97%** approval rating of Benefit Counselors by employees
 - 67 of 69 employees gave their Benefit Counselor 5-stars ★★★★★
- **92%** of text messages successfully delivered to employees

ENROLLMENT BY THE NUMBERS



VOLUNTARY BENEFITS

- Accident, Hospital, Critical Illness & Short-Term Disability
- **174** enrolled employees



WHOLE LIFE & CHRONIC CARE

- MassMutual Whole Life
- **196** enrolled employees

TOOLS TO ENHANCE VALUE & SUBSIDIZE COST

ACTIVE ENROLLMENT

Active enrollment helped to drive engagement along with Benefit Counselor support through scheduled virtual screenshare and call center enrollments.

VOLUNTARY BENEFIT OFFERING

Introduction of four new worksite, voluntary benefits to enhance the current core benefit offering.

ANCILLARY BENEFITS

Introduction of a permanent whole life coverage to complement the basic term life provided through the employer with additional benefits for chronic care for long-term care related conditions.