

# ease

## Building a Complete HR Solution with Ease

A guide to becoming a  
one stop shop for  
everything HR



## Still doing paper-based enrollment? This webinar is for you.

Learn how you can use an online enrollment solution to save your clients time and increase the value of your book.

The webinar covers:

- How to set up your groups
- The employee enrollment view
- Reporting capabilities
- ACA Compliance
- And so much more!

See for yourself why Ease is trusted by more than 5,000 agents and agency staff.

Register for our upcoming webinar at [www.Ease.com/live-broker-demo](http://www.Ease.com/live-broker-demo).



# TABLE OF CONTENTS

<b>1. Introduction</b>	<b>04</b>
<b>2. The Broker-Employer Relationship</b>	<b>06</b>
<b>3. Components: The Complete HR and Benefits Solution</b>	<b>11</b>
Online Enrollment & Benefits Administration	12
Hiring & Onboarding	14
Payroll Integration	16
HRIS	18
Compliance	20
Marketplace	22
HR Support	23
Marketing Resources	24
<b>4. Conclusion</b>	<b>26</b>

# INTRODUCTION

The broker business is changing, and unfortunately that means there are outsiders working to take you out of the equation.

As a company built by brokers, Ease is here to help you stay in the game and defend your book of business. The key is a strong broker-employer relationship, significantly complemented with a complete HR solution for your groups.

To put together this guide we spoke with many of the brokers that use Ease and listened to what they felt it took to build the optimal broker-employer relationship.



# Overview

In this guide, we're going to review what makes a great broker-employer relationship in 2017 and beyond. We'll also review the technology that enables that, as well as how to build a complete HR solution.

Today, the key to building a perfect broker-employer relationship is the combination of your expertise and a simple, but powerful technology solution.



The Complete HR Solution



Broker Advice & Expertise



Expand your book of business  
and defend it from insurgents

# THE BROKER-EMPLOYER RELATIONSHIP

Small businesses are relying on brokers like you more than ever before. They want more from their broker relationship and more for their HR and benefits programs. They also want technology for many aspects of their HR department. Unfortunately, there are direct-to-employer (DTE) HR software companies and payroll providers giving technology solutions away for free in order to cut you out. Ease is here to help you to improve your relationship and build the complete solution employers are demanding. With your knowledge, insight, and use of Ease, you can do more for your groups than just offer lines of medical coverage. This includes HRIS tools, a simpler onboarding process, telemedicine, voluntary benefits, and other resources to make your life, the employer's life, and employees' lives easier.



What do your groups want the broker-employer relationship to look like?



Employer/HR Admin



Employee



Broker

### The Broker-Employer Relationship

1

A complete HR solution with transparency, efficiency, and elasticity.

2

A custom package for each employer based on their growth trajectory and employee demographics.

3

A suite of resources available around the clock to help with benefits, onboarding, HRIS, and HR policies.

# The Relationship by Point-of-View



## For the Employer/HR Admin

Employers want a trusted resource to help them with all their HR and benefits questions. They also want HR software to better engage with Millennials, a central location for all employee HR information, benefits packages that help them recruit top talent, and less time spent on enrollment.

There has also been an increase in demand for an HR and benefits solution that is more elastic, compliant, transparent, and efficient. We can't blame employers for the demand. Why keep the same HR and benefits processes of the past when there are new capabilities to make the system more flexible and digital? They want the ability to securely complete insurance forms and onboarding documents securely online. They also want to offer plans outside the standard package like telemedicine or voluntary coverage if it means they can attract stronger employees. These desires are what groups need to suit a workforce full of different demographics including remote and millennial employees.





## For the Employee

We can agree that a job is about more than the paycheck. Employees value companies with benefits options that suit their needs, from coverage for dependents, to medical care access 24/7, regardless of what network they are in.

Employees also want one, central location for all their HR-related information. They like having the option to discuss plans with their dependents at home and the ability to easily change their benefits down the road, no matter where they are or what device they're using. Tools like videos and tutorials that they can access while making enrollment decisions are also extremely helpful.



## For the Broker

The needs of employers and employees we just listed are pretty long. You're looking for a way to check all of those off on the list, while building lasting relationships with key personnel at the company, and increasing your visibility during the enrollment process. Employers want a sense of security that you'll work with them to meet their growing and changing needs. For example, if they suddenly hire a large number of remote employees, the ability to digitally onboard and elect benefits, no matter the location, could be crucial to their business model.

With the right technology solutions, the perfect broker-employer relationship is possible with just one system and little paperwork.



## One Solution

Believe it or not, the perfect relationship we just described is achievable. It's time to own your broker-employer relationship, with the help of a complete HR and benefits solution.

With Ease, you can offer groups the same solutions (and more) as the DTE HR software companies and payroll providers. We have everything you need to build the complete HR solution that groups are demanding. That means you do too.



# COMPONENTS: THE COMPLETE HR AND BENEFITS SOLUTION



Online Enrollment & Benefits Administration ✓



Payroll Integration ✓



Compliance ✓



HR Support ✓



Hiring & Onboarding ✓



HRIS ✓



Marketplace ✓



Marketing Resources ✓

✓ = Available with Ease

Many of the key needs of your groups are met with Ease's system, and where they aren't, we've directly integrated with the top providers to fill the gaps. That means one robust solution for benefits & HR, accessible on a PC, tablet, or phone.



# Online Enrollment and Benefits Administration

Eliminating paper enrollment and moving online enables you to simplify enrollment, increase engagement with your groups, and gain visibility into the enrollment progress. With Ease, you can save time during open enrollment by eliminating paper forms and reducing errors, deepen relationships with your groups by easily adding new lines of coverage, and stay on top of enrollment status and access groups information 24/7.

## It's a win-win situation for everyone

### 1. Employees:

Employees want flexibility to enroll at home with dependents who will also be impacted. It's simpler than ever to add or remove benefits at any time, compare plans side-by-side, and employees can even see the cost per-pay-period before they choose their plan.

### 2. Employer / HR Admin:

Less paperwork to keep track of and an easier way to manage changes at any time of year, not just during open enrollment. There is also the ability to run reports and see what plans are the most popular and what employees prefer.

### 3. Broker:

Setup your first groups instantly using our plan and rate libraries. We have state age banded rates for all major medical carriers. Easily keep track and report on what's being used. The best part? Less paperwork and room for error.

# How it works with Ease



## Online Enrollment

A robust forms library with over 3,000 applications from the carriers you use.

Set up groups instantly using our plan and rate libraries. We have state age-branded rates for all major medical carriers.

The system is rules-based so no fields are left incomplete and employees only see plan options they are eligible for.

Employees can compare plans side-by side and view the cost per pay period.

Dashboards and reports to help brokers and HR admins stay up to date on enrollment progress.

Brokers and employers can quickly generate custom reports for initial binder check amounts, billing reconciliation, payroll deductions, and more.

Free training and access to a support team.



## Online Enrollment and Benefits Administration

There are many options to make the plans you offer more robust, and an added bonus of receiving more commission.

- EDI for small and large groups that can help you add lines of coverage for dental, and savings plans.
- Voluntary coverage with Unum, Transamerica, and Colonial Life.

Determine who is eligible for what plans. Ease helps you set up eligibility rules so employees only see plans they're eligible for. You can require enrollment for types of coverage so an employee can't opt out.

Stay on top of enrollment progress by viewing a progress dashboard and emailing employees in an incomplete status directly from the system.



# Hiring & Onboarding

All employers want to give their employees a flawless first day. You can help employers achieve this goal with Ease's onboarding and hiring features.

How many HR forms does an employee have to print their name and information on? One system to enter onboarding and benefits information cuts down the time it takes an employee to onboard, provides a central location for HR to find information about any employee, and reduces paperwork for all parties involved.

**Everyone benefits from online hiring and onboarding from Ease.**

## 1. Employees

They now have the option to start paperwork (online), all before their first day. They can prepare and decide how to file their W-4, enter direct deposit information, complete their I-9 form before they start, and e-sign important documents like company policies.

## 2. Employer / HR Admin

They can keep track of who's reviewed specific policy documents and provided signature acknowledgements to ensure they stay compliant. Employers and HR admins can also create and send offer letters with benefit options to get a headstart on creating a new employee's record.

## 3. Broker

Employers and employees want one location for all their HR information. Combining onboarding with benefits makes this easy.

## How it works with Ease

With Ease, applicants can accept and e-sign their offer letters and view their benefits. If the employer wishes, they can prompt employees to start the onboarding and enrollment process as soon as they accept the offer. This way, an employee can show up on their first day of work having completed onboarding and benefits enrollment.



The onboarding process is seamless and all completed online, similar to benefits enrollment:

- Each employee will complete their profile in Ease and enter personal information necessary for online enrollment.
- Employers and HR admins can use the rules-based system to ensure completed and signed W-4 information, I-9 forms, and direct deposit information, and store it securely in the cloud. They can also send and upload any company onboarding documents for new hires to review online — either with the offer letter or during the onboarding process.
- The custom documents feature in Ease lets your groups do more than create and send offer letters. Employers and HR admins can create templates with dynamic fields for personalized documents that are repeatedly created, sent, and require signatures.



# Payroll Integration

There are a lot of reasons to integrate payroll with HR, benefits, and onboarding. First, benefits and onboarding impact payroll. Employers are looking for a fully integrated system of record, so they only have to make changes once and have the information sync across systems. If an employee with payroll integration has a benefit adjustment, the change would flow to the employee's payroll. Unfortunately, there are also payroll providers, that may provide payroll services to your groups already, working to create their own "HR Solutions" and cut you out of the equation. There's no need to let that happen with Ease's payroll integrations.

**Payroll also benefits all the parties involved in the perfect broker-employer relationship we're working to achieve.**

## 1. Employees

If an employee makes a benefit change, they can see the difference in cost per pay period instantly in Ease. With some integrations, no more paper pay stubs or having to log in to a different system to view a paycheck.

## 2. Employer / HR Admin

Finally, one place to keep track of everything and the ability to automate the benefit change process. If an employee enrolls in a plan or adds a dependent, the changes can automatically flow to payroll and start deducting in the appropriate pay period.

## 3. Broker

You can offer a system that automatically syncs with their payroll provider. Save your groups time and headaches.



## How it works with Ease

Ease has robust payroll integrations with leaders like ADP, TRAXPayroll, and Paylocity:

- One system of record, so all of your HR services are in sync: benefits, online enrollment, and onboarding.
- Mobile paystubs with TRAXPayroll.
- Any benefit changes automatically communicated to your payroll providers. Changes also can be processed at any time, and in the appropriate pay period.
- New employees set up with payroll providers will automatically flow to Ease.
- With Ease's payroll API, any payroll provider can integrate with Ease.
- There is flexibility. If a broker has groups that use different payroll providers, they can integrate with each one.

Open Enrollment and Benefit Changes throughout the year

Payroll API

Payroll and Benefits In Sync

Simple employee setup





# HRIS: Time-Off Tracking, Company Stats, Performance Reviews, and More

DTE HR software companies and payroll providers selling directly to your groups are bundling benefits consulting and onboarding solutions with HRIS. With Ease, you can help your groups do more than just benefits with services like HRIS. The best part is that HRIS works with the rest of Ease, which means no separate login or limited training. Employees just have to use one system and one expert (you).

## HRIS helps everyone in the broker-employer relationship:

### 1. Employees

HRIS provides an easy way to approve and request time-off, and track how much paid time-off is remaining per employee.

### 2. Employer / HR Admin

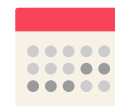
A central location to view company statistics, administer performance reviews, and create surveys. Ease's HRIS also integrates with payroll to automate paid time-off tracking.

### 3. Broker

You can survey employees to gauge their satisfaction with their benefit options through HRIS. Since HRIS integrates with payroll, benefits, onboarding, and more, you're providing one database for employers to manage and administer all associated HR tasks. It's that one solution they've been looking for.

# How it works with Ease

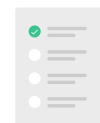
Ease HRIS helps manage company growth, and syncs with all of Ease’s other services like benefits, payroll integration, and onboarding. It uses the same login as Ease’s onboarding and online enrollment, making the setup extremely easy. HRIS is a paid add-on.



## Time-Off Tracking

Setup holidays, manage PTO policies and track time off requests all within Ease. Employees can request time off and managers can approve on the go, perfect for busy teams

- PTO requests & approval
- Manager approval notice
- Calendar sync
- Customizable PTO policies
- Payroll sync integration



## Performance Reviews

Create custom performance reviews. Once created they can save performance review templates and share them with other managers within their organization



## Employee Events/Company Directory

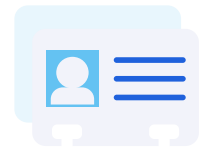
One complete directory for employee contact information. View or search by name, location, and department. No setup required. Never miss a birthday or work anniversary again!



## Company Stats

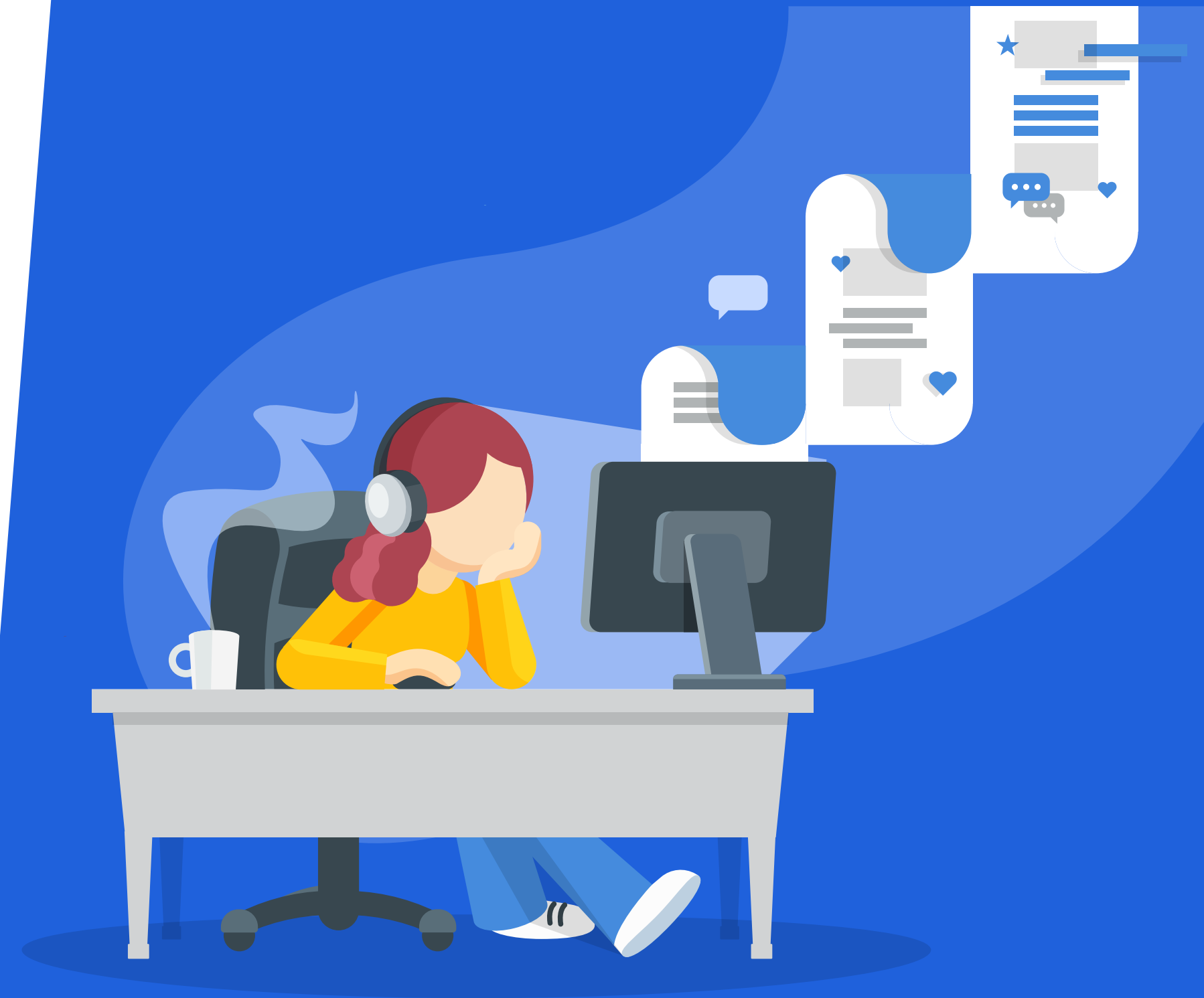
Company executives and HR admins can make better decisions with visualized HR stats, including employee growth, company diversity, and more.

This includes company organization charts. Companies can show how teams are structured



# Compliance

Today, staying compliant can be difficult, especially when dealing with policies like the Affordable Care Act (ACA). Employers and company admins are looking for a solution that reduces the risk of penalties and that doesn't require a lot of work. They're also looking for legal advice on how to approach questions or roadblocks that come their way, whether it's ACA, FMLA, disability, or something else. Having a technology solution like Ease means you have the ability to adapt to the changing compliance needs of your groups, even during busy times like open enrollment.



## How it works with Ease

Ease's compliance capabilities offer you and your groups an affordable, simple solution to prevent penalties and fees. Our ACA module helps track and measure variable hour employees, calculate affordability, and deliver and track required notifications. You and your groups can manage and track federal deadlines for ACA reporting and access signature ready IRS forms.

## Here are some more details on Ease's ACA module features:

1. The ability to verify ACA compliance throughout the year with one easy to use dashboard.
2. ACA Compliance features automatically calculated based on your benefits data.
3. Track and manage variable hour employees.
4. Affordability testing to ensure that health care coverage offered meets the minimum guidelines for affordability.
5. Generate and download e-file 1094c and 1095c IRS forms.

Want more? We have more compliance tools available in the Ease Marketplace to help with compliance including HRAnswerLink and HR on Demand.



# Ease Marketplace

Ease's Marketplace includes a full suite of applications that allows you to tailor your services to each employer's needs. Many employers are working with an increasing number of remote employees, and it's natural to want benefits that can cater to both those in and out of the office (and network). Employers can also browse the Marketplace for available features they may want to work with you to add.

Check the Ease Marketplace regularly to stay up to date with the services you can use to help build and customize your complete HR solution.





## HR Support

Employers and HR admins are increasingly looking for advice and guidance on HR policies. It can be difficult for one HR admin to know every single answer to an HR issue or violation. Around the clock HR support can be a comforting and necessary feature for employers when choosing a benefits package. An admin would love resources to turn to in complicated situations such as an employee showing up to work intoxicated or an employee violating a time-off policy.

DTE HR software companies and payroll providers are offering support, and with Ease you can too. Employers can purchase services from HR AnswerLink through the Ease Marketplace. Both services give you and your groups the advice needed on compliance, legal matters, and more. Employers can work with their own HR support specialist 24/7, gain access to libraries of information on how to handle any HR related issue possible, and view webinars about policies like company conduct violations, FMLA, and ACA.



## Marketing Resources

The way we see it, there are two options in today's benefits and HR industry.

### Option 1

**Imagine that some day in the future your groups are contacted directly about moving their benefits over to a large payroll provider or new DTE HR software company.**

You don't offer a technology solution, because perhaps you don't think your groups are interested in doing enrollment online. Your group takes the call and likes the free HR services and payroll integration that comes along with managing benefits. They call you up to let you know they're switching to a DTE HR software company.

### Option 2

You regularly let your groups know about the benefits of the technology solution you provide. If they are contacted by a large payroll provider or new DTE HR software company, they'll reach out to you to see if you have the same capabilities, or they'll already know about them. Matching the other company feature for feature combined with your personal relationship means you're more likely to keep them as your client.

### Why risk option 1?



**The following resources are currently available for you to use when marketing Ease to your groups:**



Promotional videos for you to share with your groups. Take a look at this one about online enrollment.



Frequent and convenient webinars for employers and brokers about Ease features as well as tips and tricks for navigating the system.



Custom branded documents about how Ease works for employers, and the system's key features like onboarding, and HRIS.



Resources for you to better understand key integrations, how they work, and their value. This includes information on payroll integrations, voluntary benefits, and more.

# CONCLUSION

Online enrollment is here to stay. A 2015 LIMRA study found that 68% of employees want to enroll in benefits online or electronically and only 16% want paper enrollment forms. We're also pretty sure that this number has grown in the last few years.

There is no need to wait any longer — with your experience and trusted relationships, you deserve to stay in this business and continue to serve your groups. Use Ease and become the complete HR and benefits solution your groups are looking for.

 **An added bonus? The price is right!**

	Ease	Direct to Employer HR & Benefits Software	
 Online Enrollment & Benefits Administration			
 Hiring & Onboarding			
 Payroll Integration			
 HRIS			
 Compliance			
 Marketplace			
 HR Support			
 Marketing Resources			

You can register for a webinar at [www.Ease.com](http://www.Ease.com) or contact us at [requestinfo@Ease.com](mailto:requestinfo@Ease.com) | 1-800-446-EASE to learn more.

# Thank you!



To hear what brokers are saying about Ease,  
visit <http://hr.Ease.com/customer-video.html>

**ease**

**Call:** 1-800-446-ease

**Email:** [requestinfo@Ease.com](mailto:requestinfo@Ease.com)