

## Setting Up a New Plan

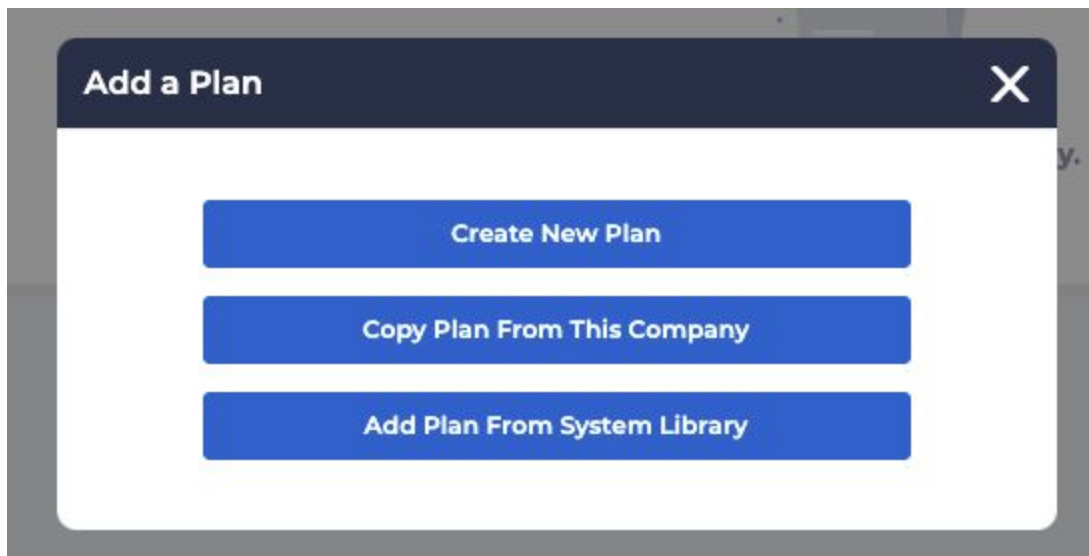
**What you will need:** Information needed for plan builds will vary by benefit type. Below are a few of the essentials:

- **Eligibility rules:** Who is eligible? What are your waiting periods?
- **Basic benefit coverage** information (deductibles, co-pays, etc.).
- **Monthly carrier rates.**
- **Employer/employee monthly contribution** strategy and amounts.

1. To set up a new plan, go to the Plans tab from the left navigation bar and then select **Add a Plan** from the right.

Plan Name	Carrier	Effective Date	Eligible / Enrolled	Status
<b>Medical</b>				
KP Platinum 90 HMO 0/0 + Child Dental	Kaiser Permanente	01/01/19 - 12/31/19	- / 2	Active
UHC Select Plus Gold 25/250/20%	UnitedHealthcare	01/01/19 - 12/31/19	- / 2	Active
UHC Select Plus HDHP Silver 2300/30%	UnitedHealthcare	01/01/19 - 12/31/19	- / -	Active
UHC Select Plus Platinum 10/10%	UnitedHealthcare	01/01/19 - 12/31/19	-	Inactive
<b>Dental</b>				
Dental POS	Principal Financial Services	01/01/19 - 12/31/19	- / -	Active
Dental PPO	Principal Financial Services	01/01/19 - 12/31/19	- / 3	Active
<b>Vision</b>				
Vision	Principal Financial Services	01/01/19 - 12/31/19	- / 4	Active

2. You have two options for adding a plan:



a. **Option 1: Create a New Plan.**

**Create a New Plan** ✕

Product Type \*

Medical

▼

Provider / Carrier \*

Select

▼

[Request New Carrier](#)

Plan Name \*

Effective Start Date \*

MM/DD/YYYY

Effective End Date \*

MM/DD/YYYY

Policy Anniversary Month \*

Select

▼

Cancel

Save & Continue

b. **Option 2:** If plan contributions are identical across all plans (the only changes are plan details, coverage, and plan rates), you can save time on plan set up by copying an existing plan and making necessary changes to the plan details.

**Copy Plan From This Company** ✕

Product Type \*

Medical

▼

Plan \*

KP Platinum 90 HMO Q/10 + Child Dental

▼

**New Plan Policy Info**

Provider / Carrier \*

Kaiser Permanente

▼

[Request New Carrier](#)

Plan Name \*

KP Platinum 90 HMO Q/10 + Child Dental - Copy

Internal Plan Name/ID

KP Platinum + Child Dental

Group #

Plan Type

HMO

▼

☐ This is a High Deductible Health Plan.  
Employees enrolled in this plan may also be eligible to enroll in an HSA and Limited Purpose FSA.

Level

Select

▼

Effective Start Date \*

MM/DD/YYYY

Effective End Date \*

MM/DD/YYYY

Policy Anniversary Month \*

Select

▼

**Plan Details to Include with Copy**

YES

Eligibility

YES

Coverage

YES

Rates

YES

Contributions

YES

Additional Settings

YES

Resources

Cancel

Save & Continue

3. Save and continue to establish the plan “shell”

4. Continue filling in the required information for each tab being sure to click **Save & Next** at the bottom of each.
  5. The Summary tab will display red exclamation points next to incomplete sections.
  6. When all sections complete and the Summary tab indicates all green check marks, click **Activate**. Eligible employees will now be able to enroll in this plan when they have an unlocked enrollment window.
- **IMPORTANT NOTE:** Once an employee has enrolled in the plan, the plan set up will lock and you will not be able to make any changes to the plan.

The screenshot shows the 'UHC SELECT PLUS PLATINUM 10/10% - COPV' plan setup page. The left sidebar contains navigation menus for BENEFITS, PLANS, PREPARE FOR PAYROLL, ENROLLMENT, TOOLS, and REPORTS. The main content area has a breadcrumb trail: < Back to Plans > UHC SELECT PLUS PLATINUM 10/10% - COPV. Below this is a tabbed interface with Policy Info, Eligibility, Coverage, Rates, Contributions, Additional Settings, Resources, and Summary (active). A warning banner states: 'Warning! Plan eligibility rules, rates, contributions, and/or coverage amounts will be locked from changes once the plan is activated and at least one employee enrolls, as changes may impact existing enrollment records. Please review plan setup carefully before activating.' The Summary section shows a table with columns for ENROLLED (0) and ELIGIBLE (0), and an Activate button. Below the table are expandable sections for Policy Info, Eligibility, Coverage, Rates, Contributions, Additional Settings, and Resources. The first three sections (Policy Info, Eligibility, Coverage) show a green checkmark icon, while the remaining four (Rates, Contributions, Additional Settings, Resources) show a red exclamation mark icon, indicating they are incomplete.