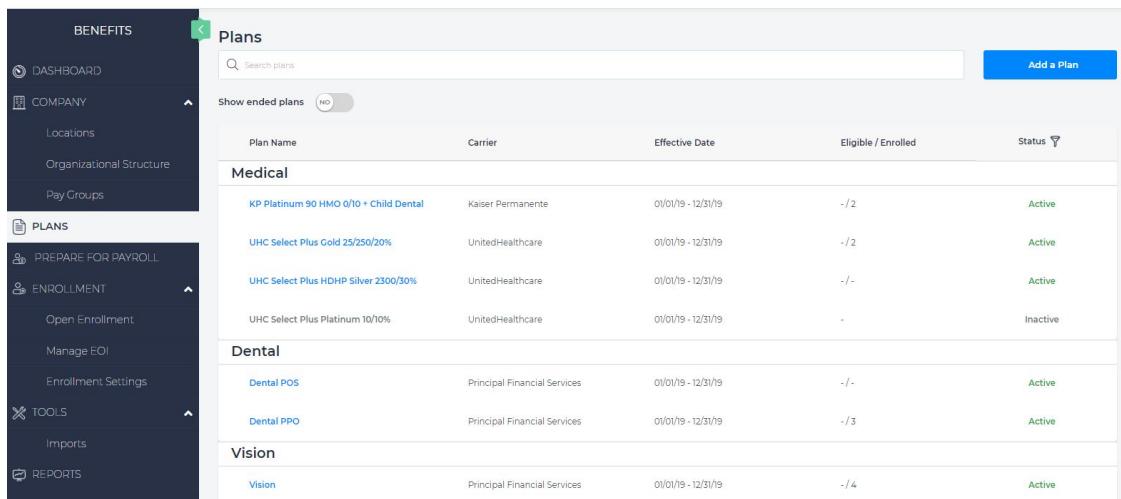


Setting Up a New Plan

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

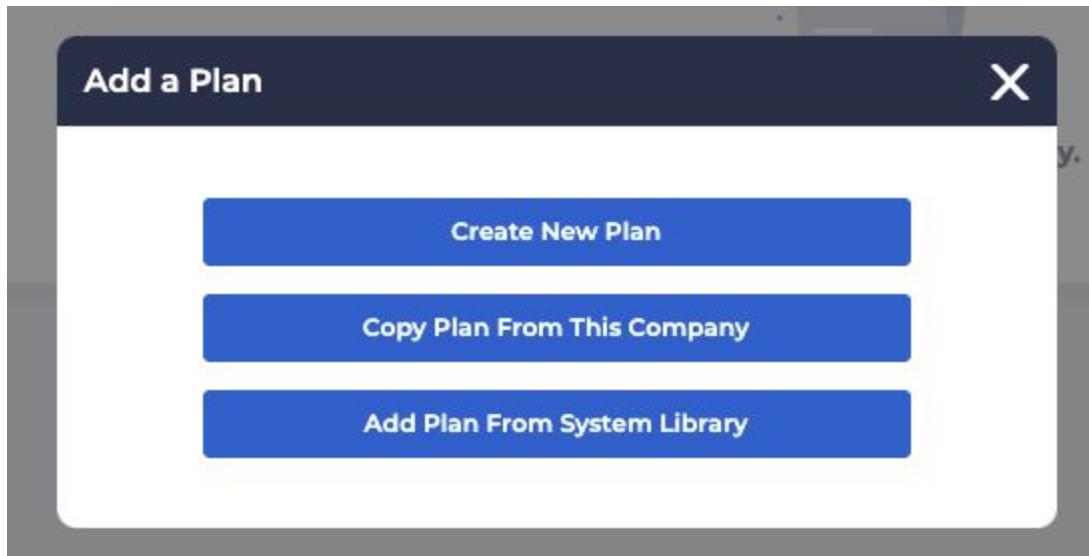
- **Eligibility rules:** Who is eligible? What are your waiting periods?
- **Basic benefit coverage** information (deductibles, co-pays, etc.).
- **Monthly carrier rates.**
- **Employer/employee monthly contribution** strategy and amounts.

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
KP Platinum 90 HMO 0/10 + 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
Dental				
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
Vision				
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	<input type="button" value="▼"/>
Provider / Carrier *	Select	<input type="button" value="▼"/>
Plan Name *	<input type="text"/>	
Effective Start Date *	<input type="text"/> MM/DD/YYYY	
Effective End Date *	<input type="text"/> MM/DD/YYYY	
Policy Anniversary Month *	Select	<input type="button" value="▼"/>
<input type="button" value="Cancel"/> <input type="button" value="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	<input type="button" value="▼"/>
Plan *	KP Platinum 90 HMO 0/10 + Child Dental <input type="button" value="▼"/>	
New Plan Policy Info		
Provider / Carrier *	Kaiser Permanente	<input type="button" value="▼"/>
Plan Name *	KP Platinum 90 HMO 0/10 + Child Dental - Copy	
Internal Plan Name/ID	KP Platinum + Child Dental	
Group #	<input type="text"/>	
Plan Type	HMO	
<input type="checkbox"/> 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	<input type="button" value="▼"/>
Effective Start Date *	<input type="text"/> MM/DD/YYYY	
Effective End Date *	<input type="text"/> MM/DD/YYYY	
Policy Anniversary Month *	Select	<input type="button" value="▼"/>
Plan Details to Include with Copy		
<input type="radio"/> Eligibility	<input type="radio"/> Coverage	<input type="radio"/> Rates
<input type="radio"/> Contributions	<input type="radio"/> Additional Settings	<input type="radio"/> Resources
<input type="button" value="Cancel"/> <input type="button" value="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% - COPY' plan summary page. The left sidebar includes sections for Benefits, Dashboard, Company (Locations, Organizational Structure, Pay Groups), Plans (Prepare for Payroll, Enrollment, Tools, Reports), and a summary of 0 enrolled and 0 eligible employees. The main content area has a warning message: '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.' Below this, the 'Summary' tab is active, showing status indicators for various plan components: Policy Info (green checkmark), Eligibility (green checkmark), Coverage (green checkmark), Rates (green checkmark), Contributions (red exclamation mark), Additional Settings (red exclamation mark), and Resources (red exclamation mark). An 'Activate' button is located at the top right of the summary section.