iNavigator

HR Training Manual

Marshall & Sterling®
GROUP BENEFITS

iNavigator

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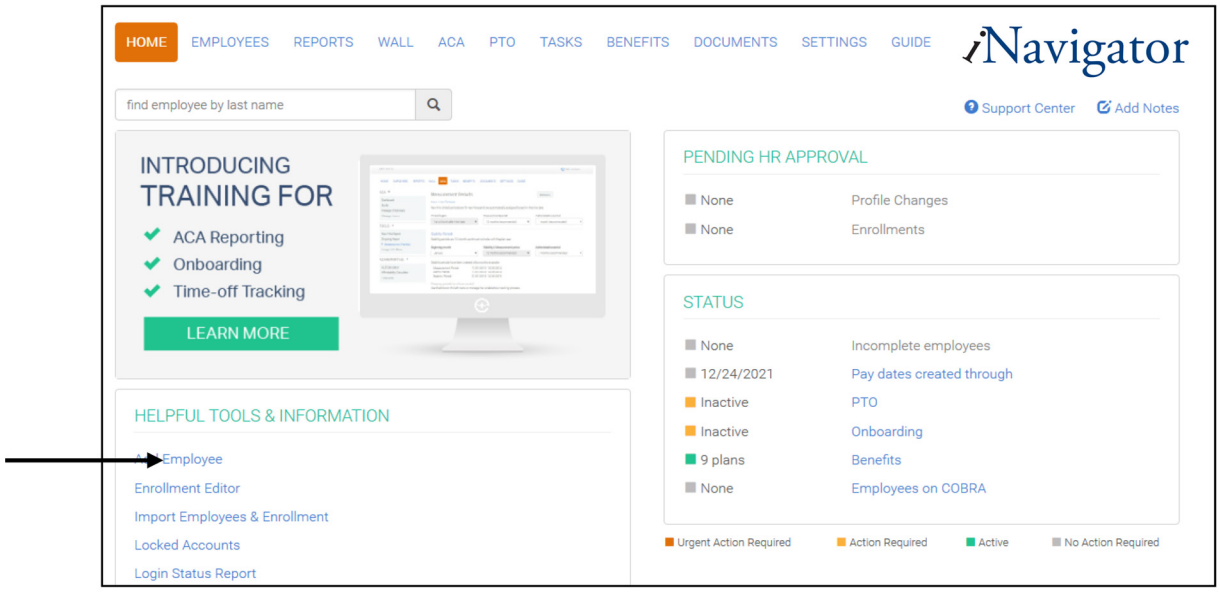
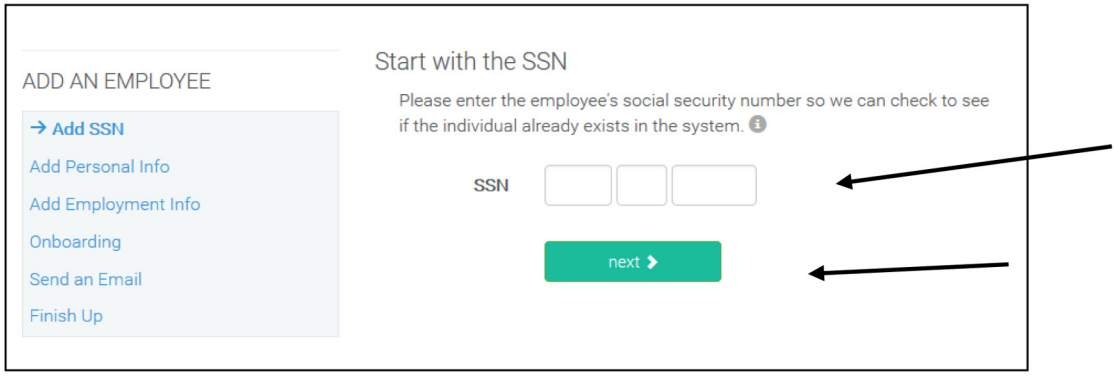
How to add a New Employee:

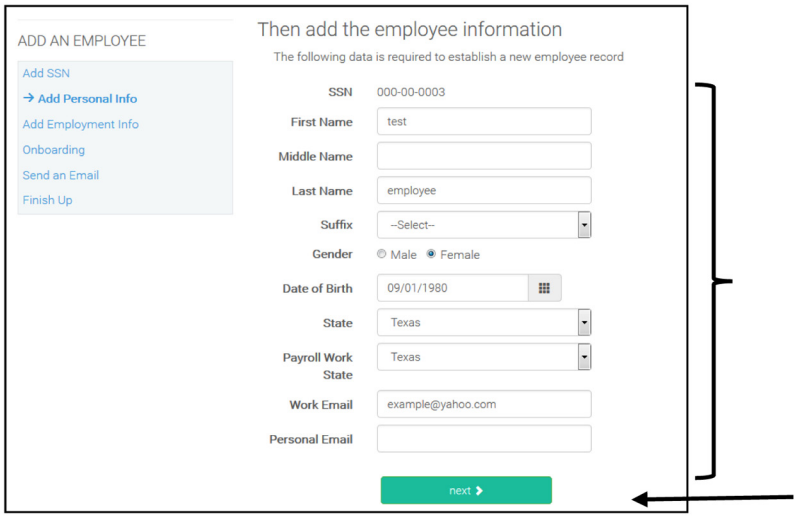
1. From your "Home" page, select "Add Employee" under "Helpful Tools and Information".



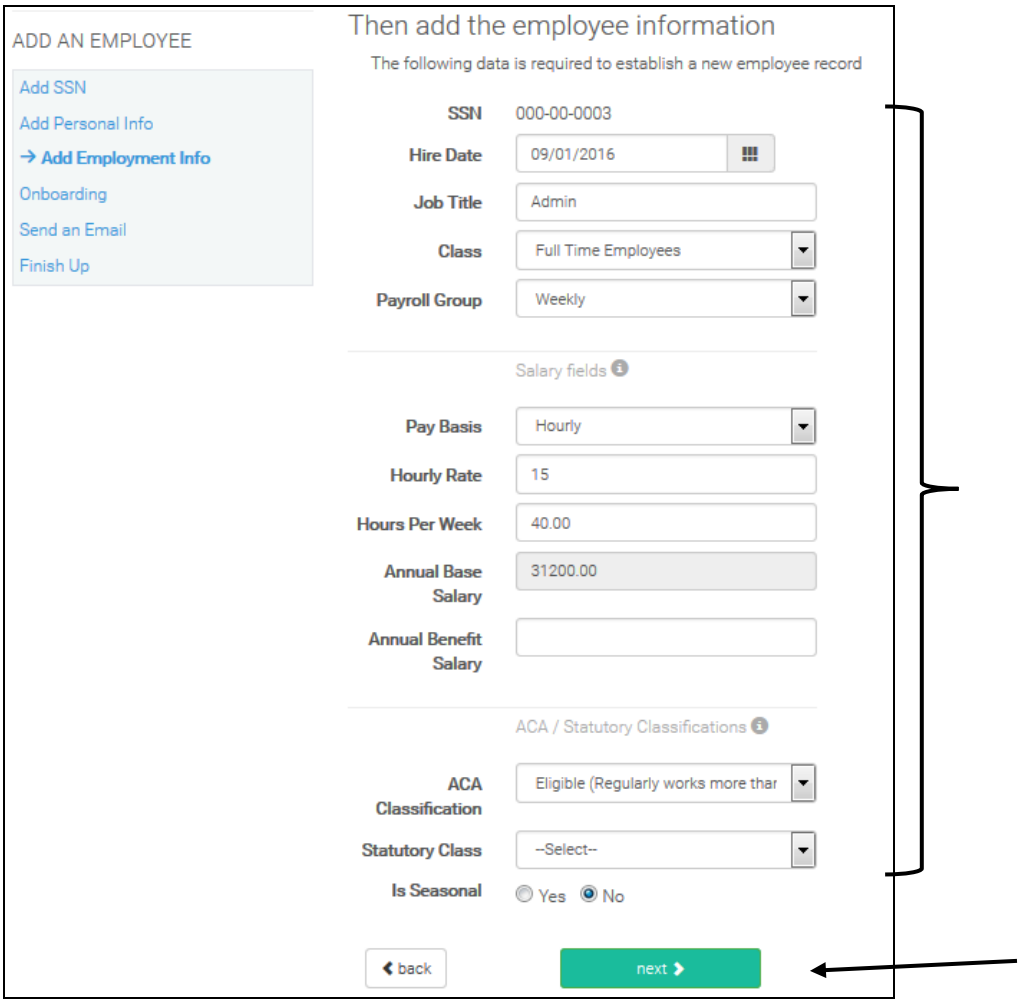
2. Enter the Employee's SSN and press "Next".



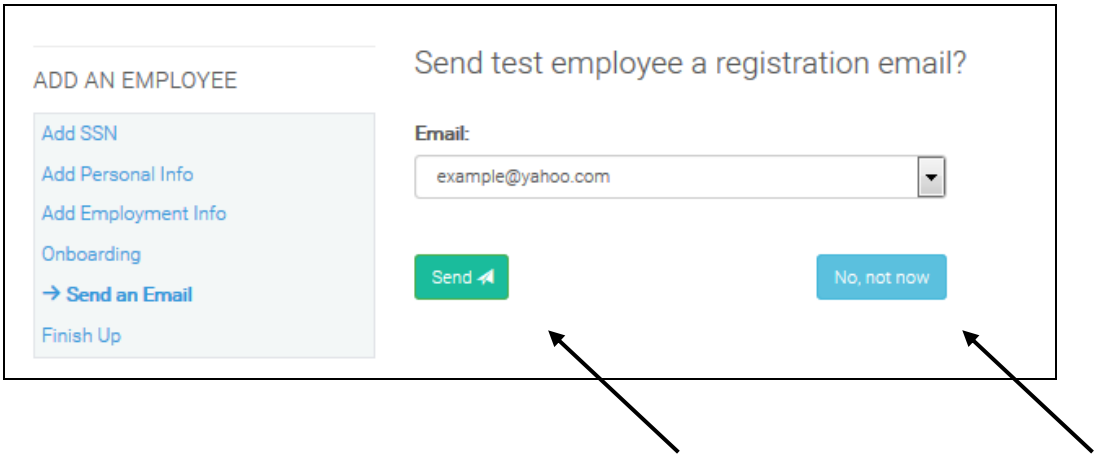
3. Enter the Employee's Personal Info and press "Next".



4. Enter the Employee's Employment Info and press "Next".

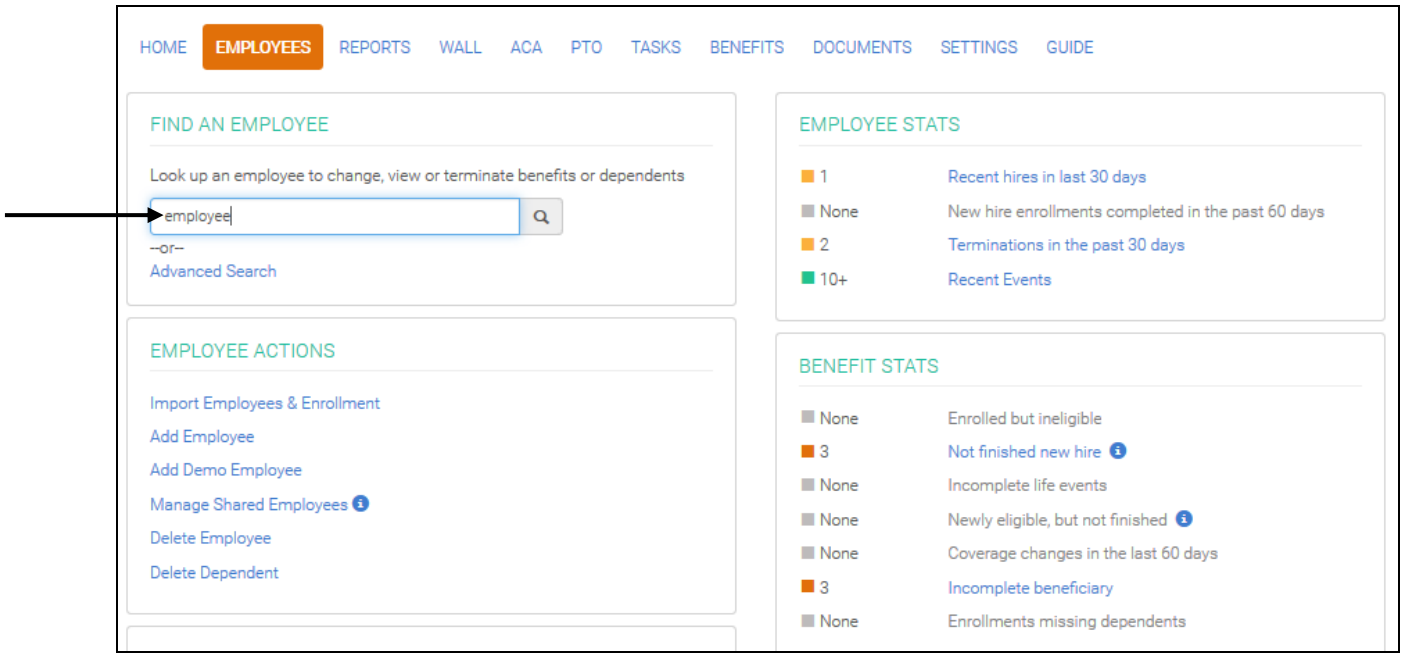


5. Select "Finish Up" under "Onboarding" and press "Send" if you would like to send the new employee a registration email. (we suggest you send an email to all full time employees- the employee can use the link in the email to complete their new hire elections.)

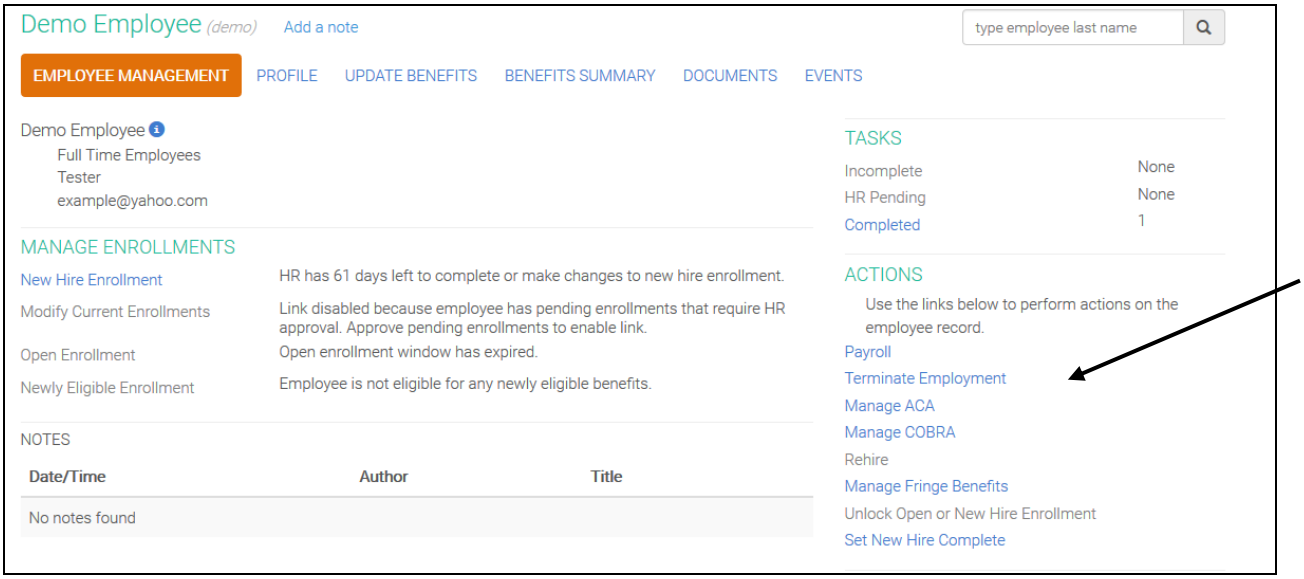


How to Terminate an Employee:

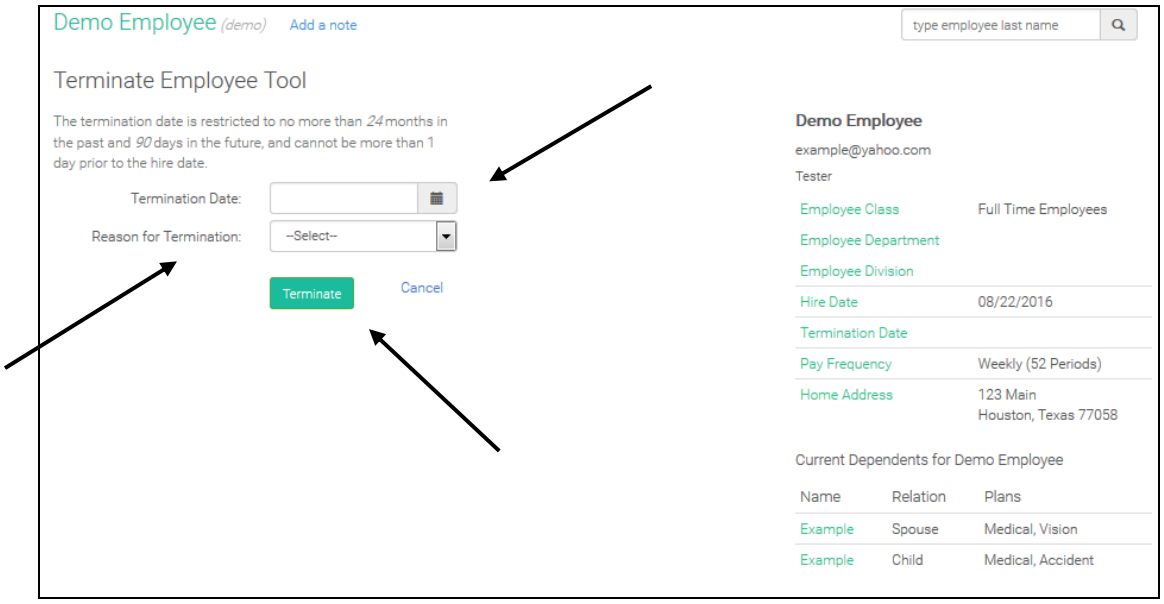
1. From the "Employees" tab, search the last name of the employee.



2. From the Employee's Home Page, select "Terminate Employment" under "ACTIONS".



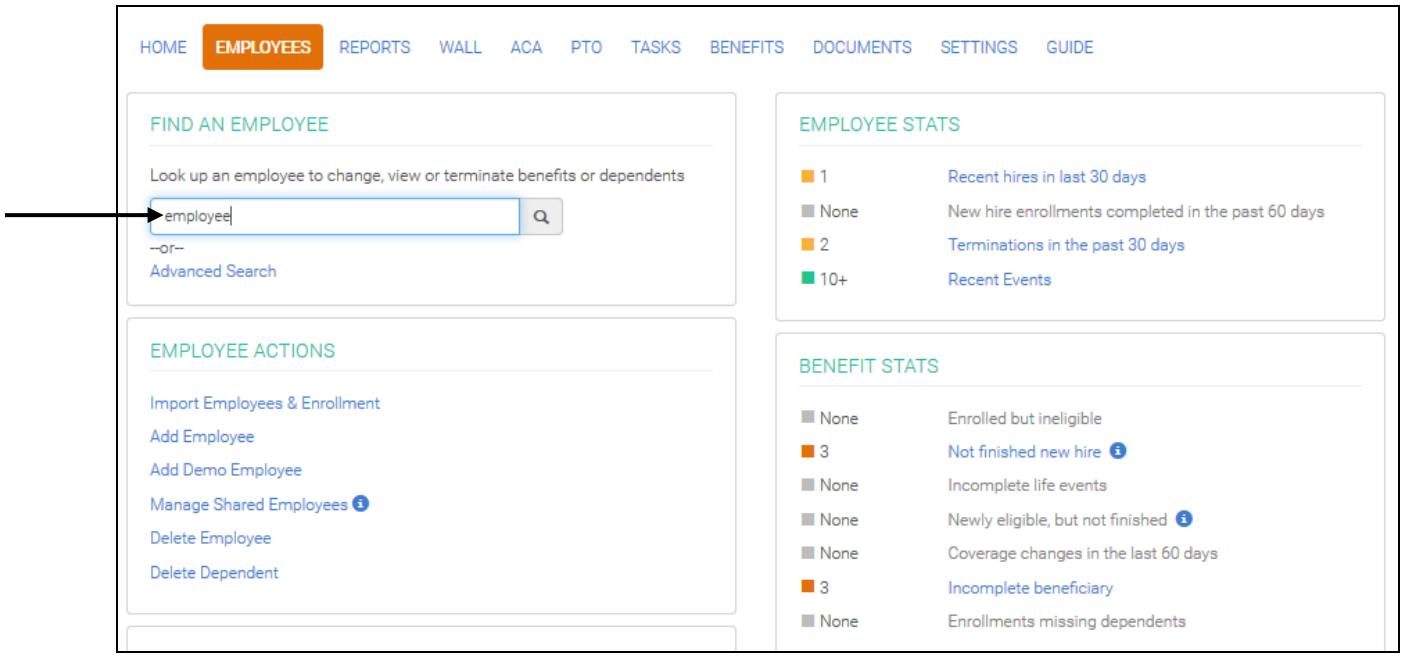
3. Enter the Employee's "Termination Date", select a "Reason for Termination" and press "Terminate". Press "Confirm" on the next pop-up.



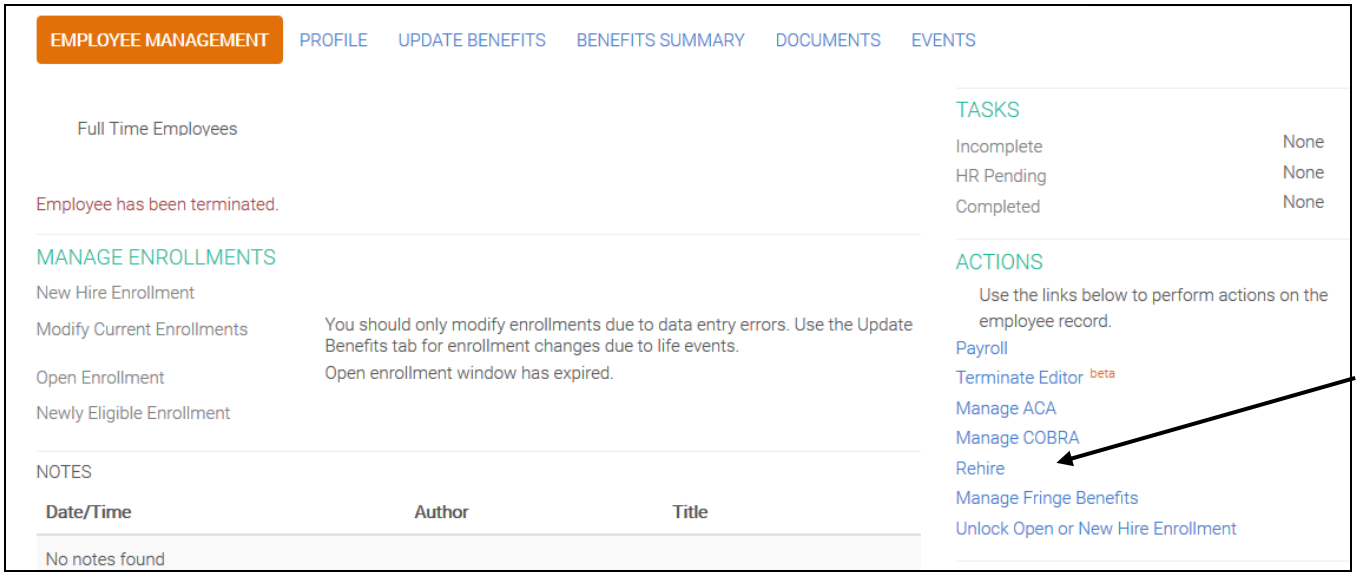
****Once you terminate an employee, they lose access to Employee Navigator.****

How to Rehire an Employee:

1. From the "Employees" tab, search the last name of the employee.



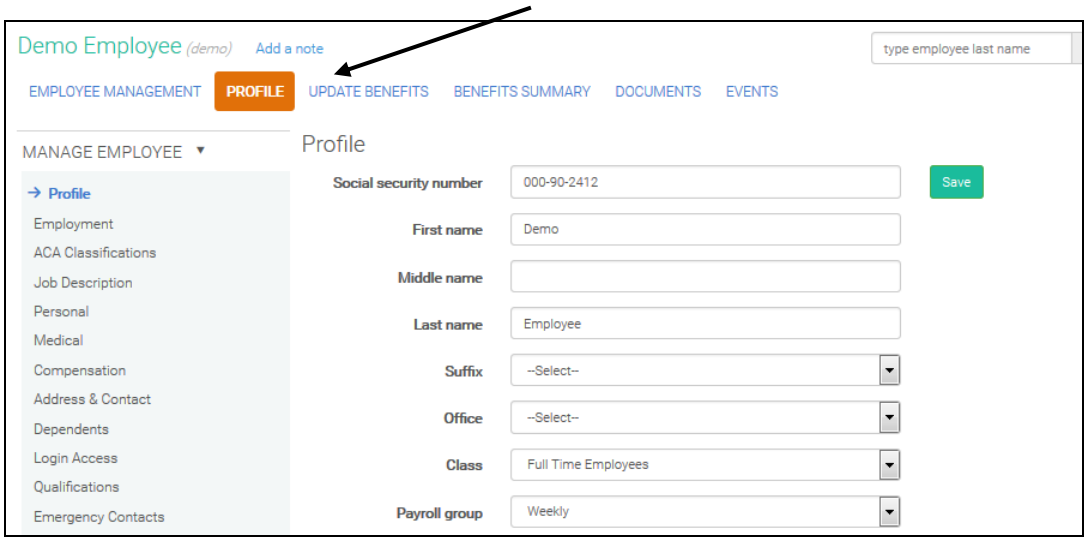
2. From the Employee's Home Page, select "Rehire" under "ACTIONS".



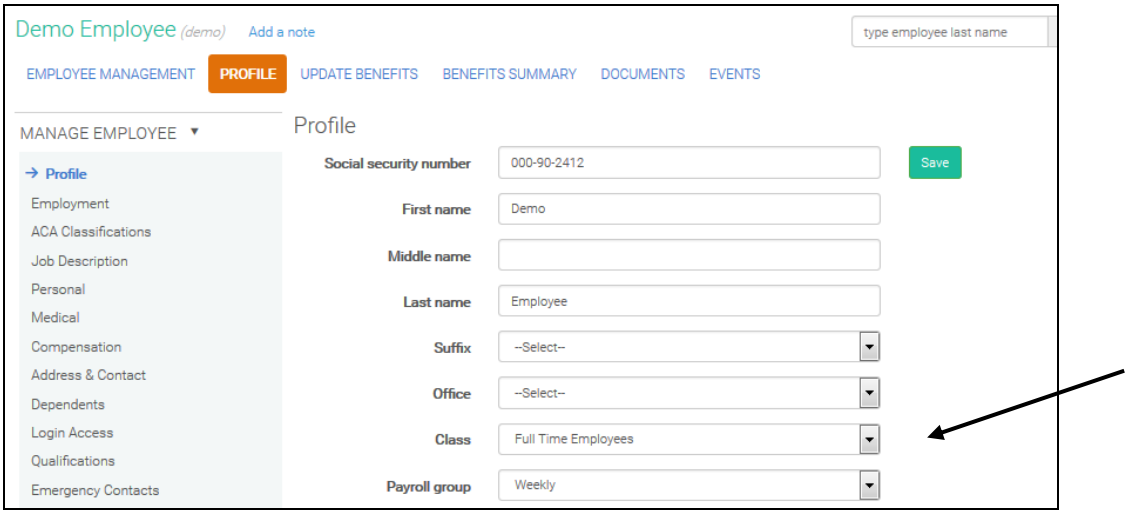
3. Enter the Employee's "Rehire Date", and press "Rehire".

How to Change an Employee's Employment Status & Pay:

1. From the Home Page, select "Profile".

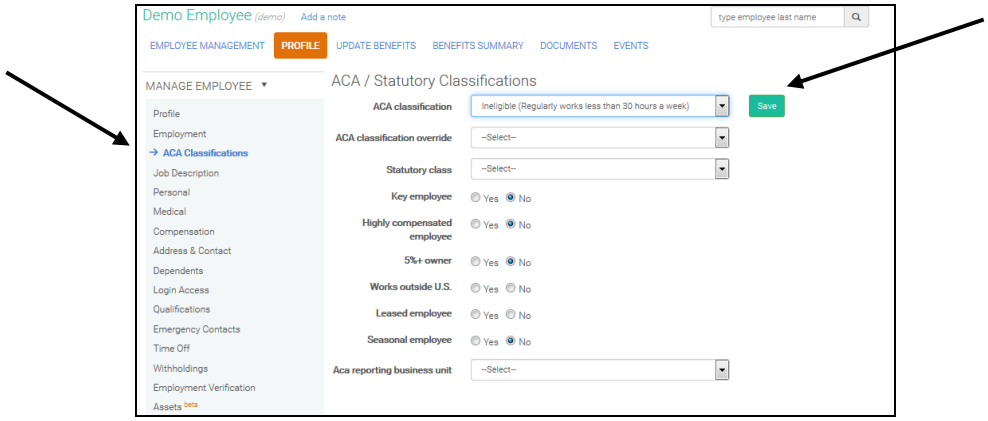


2. To change the Employee to "Full Time" or to "Part Time", select the drop down for "Class" and press "Save".

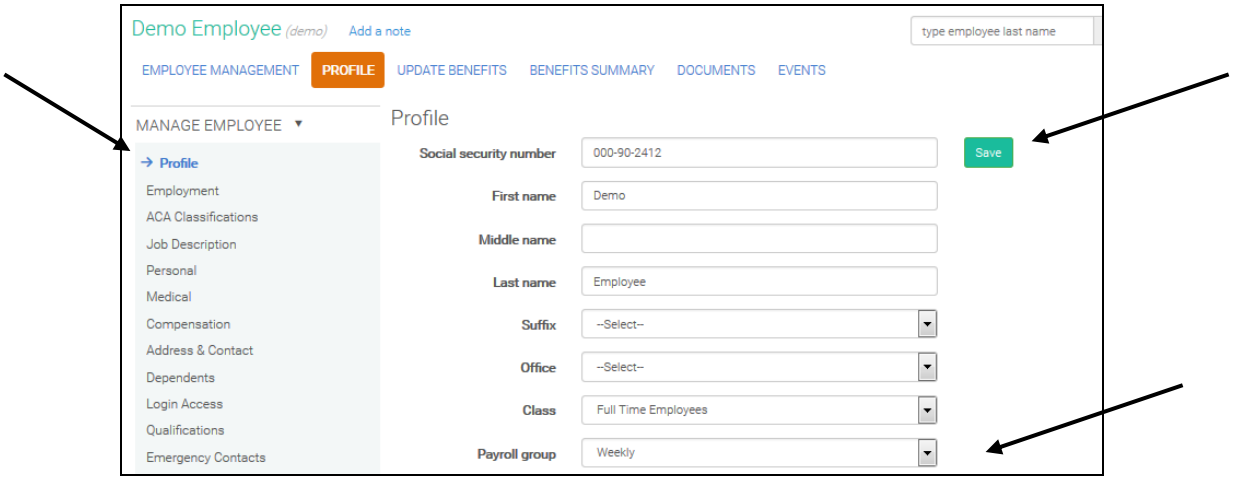


Then, select "ACA Classifications" under "Manage Employee" and change the "ACA Classification" to:

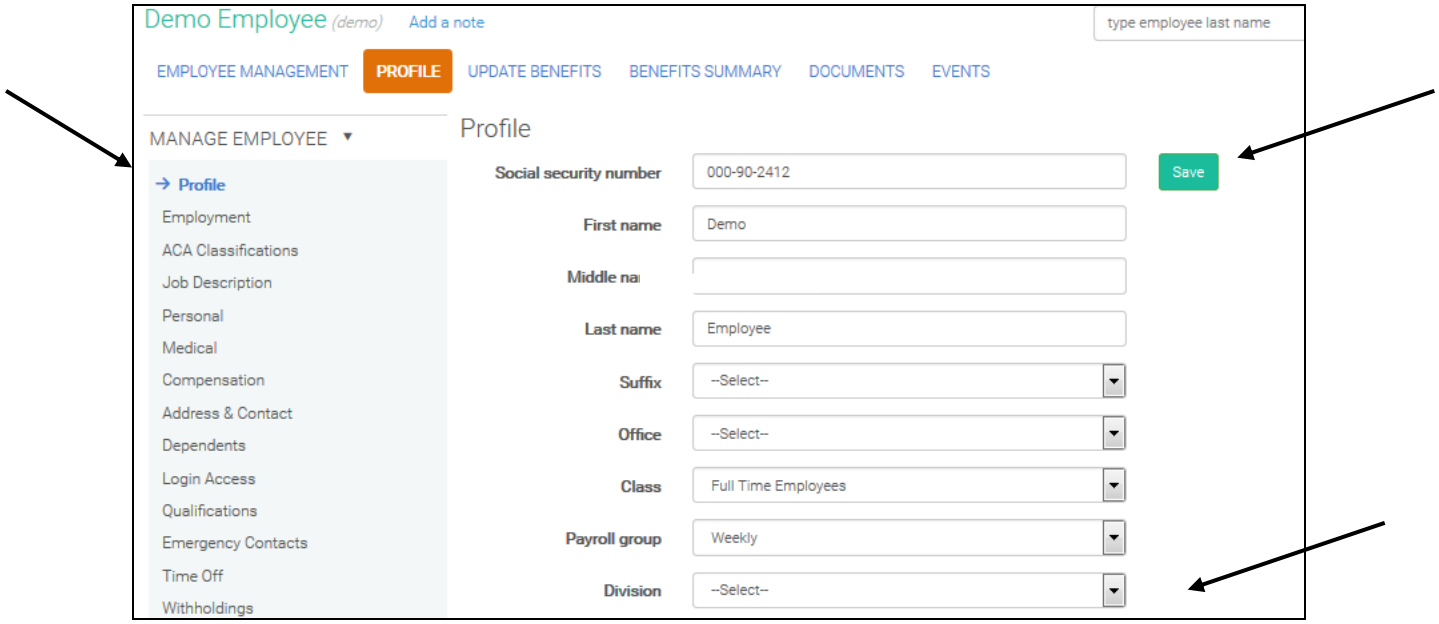
"Ineligible" for Part Time Employees <u>OR</u> "Eligible" for Full Time Employees and press "Save".



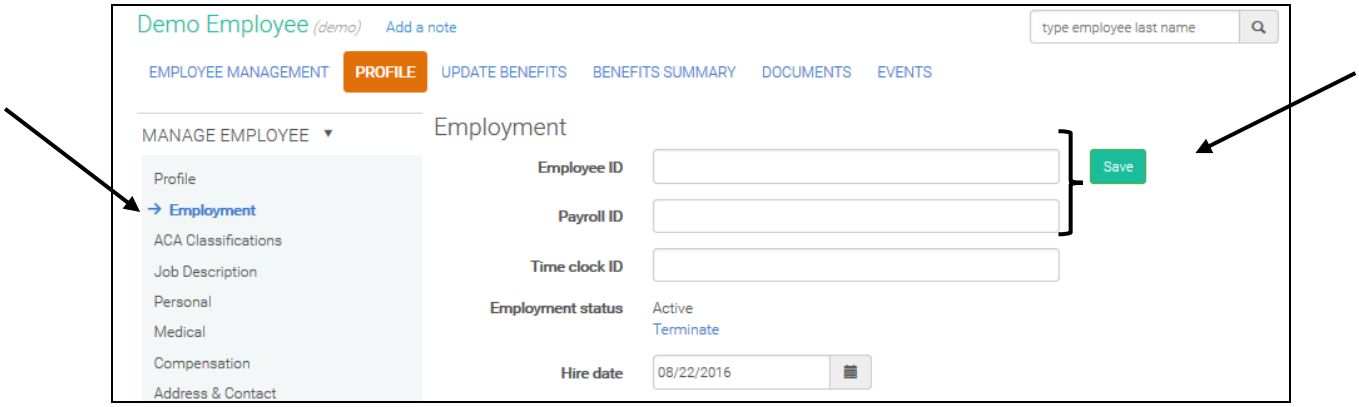
3. To change the Employee's "Payroll Group" (if applicable), select the drop down for "Payroll Group", under "Profile", and press "Save".



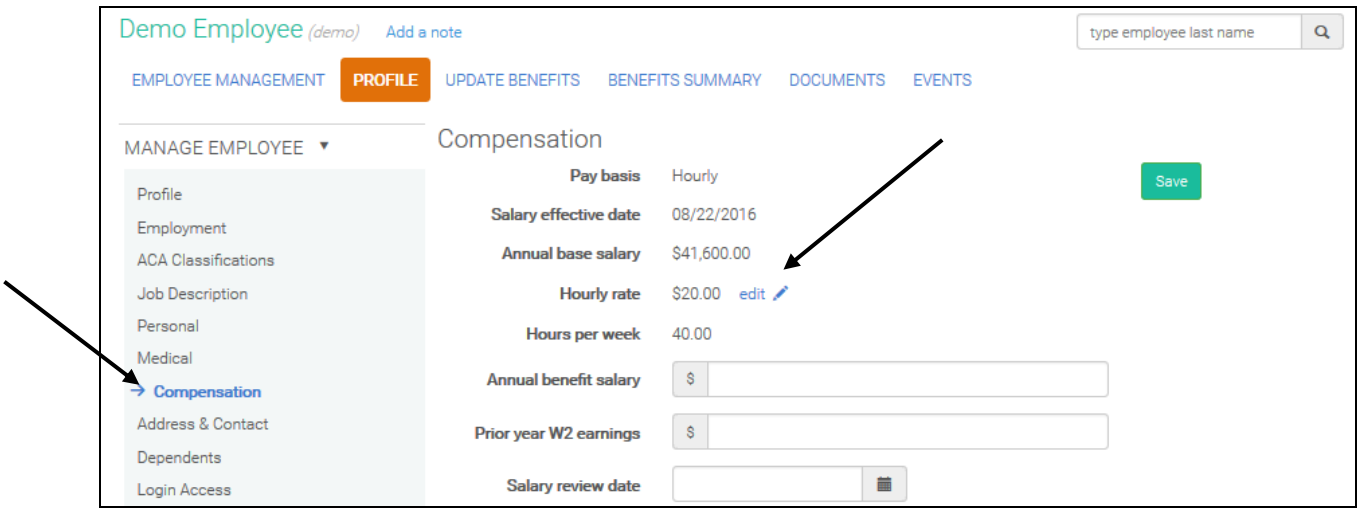
4. To change an Employee's "Division" (if applicable), select the drop down for "Division", under "Profile", and press "Save".



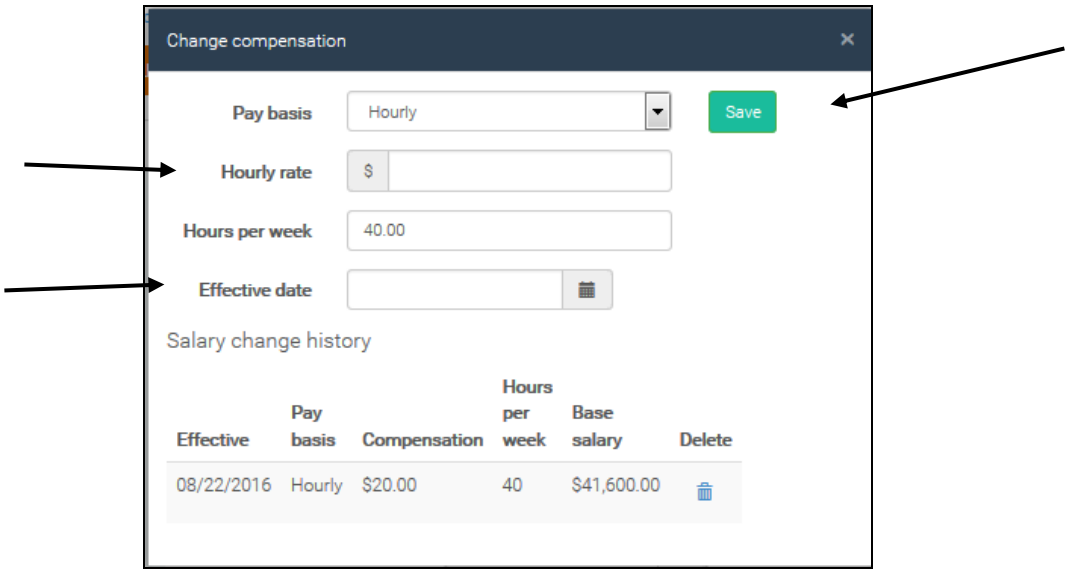
5. To add an "Employee ID or Payroll ID", select "Employment" under "Manage Employee". Enter the ID number(s) and press "Save".



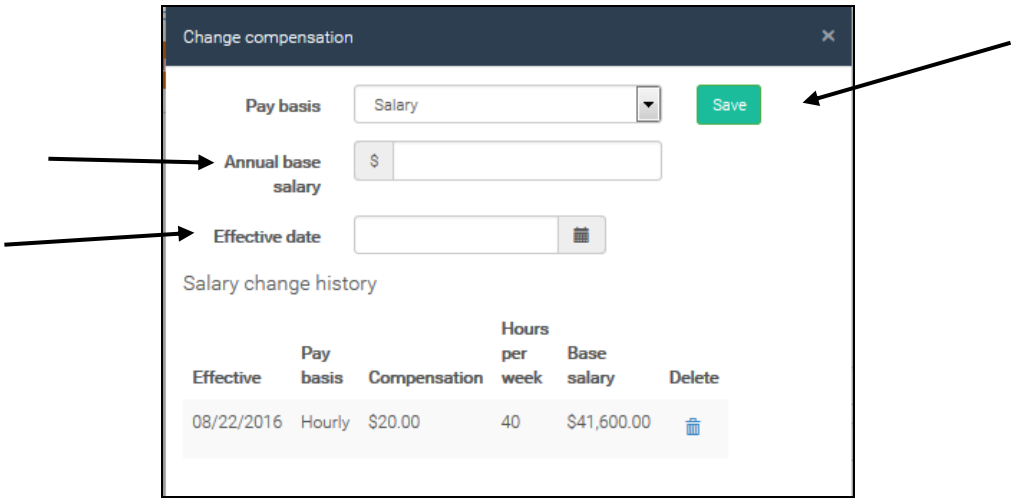
6. To change an Employee's salary, select "Compensation" under "Manage Employee" and select "Edit."



Then, you can change the Employee's "Pay Basis" (ex. Hourly → Salary). If changing to "Hourly", enter the new "Hourly Rate" and the "Effective Date" and press "Save".



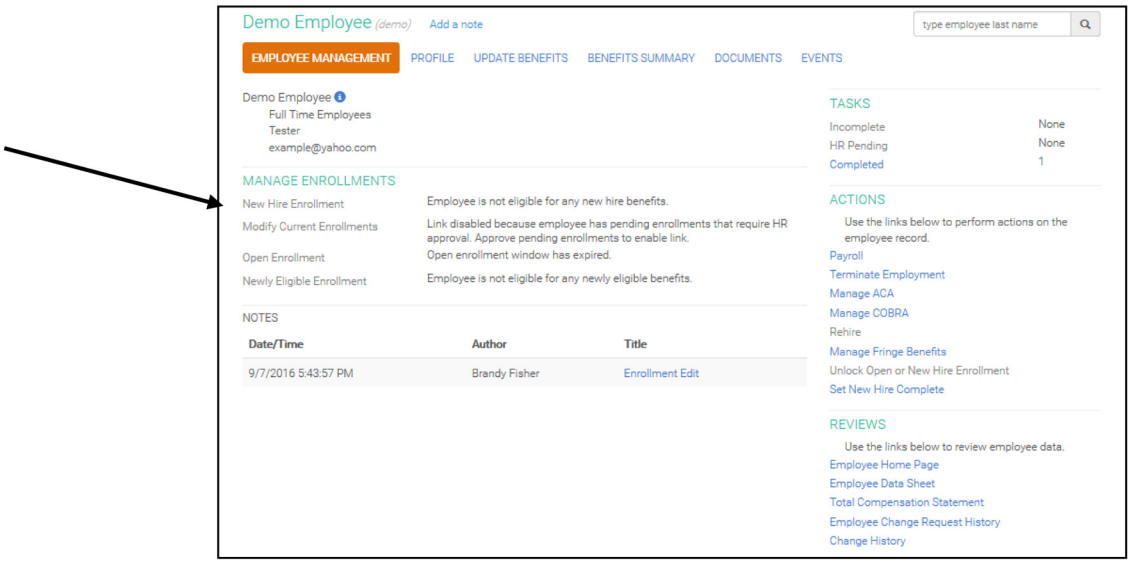
If changing to "Salary", enter the new "Annual Base Salary" and the "Effective Date" and press "Save".



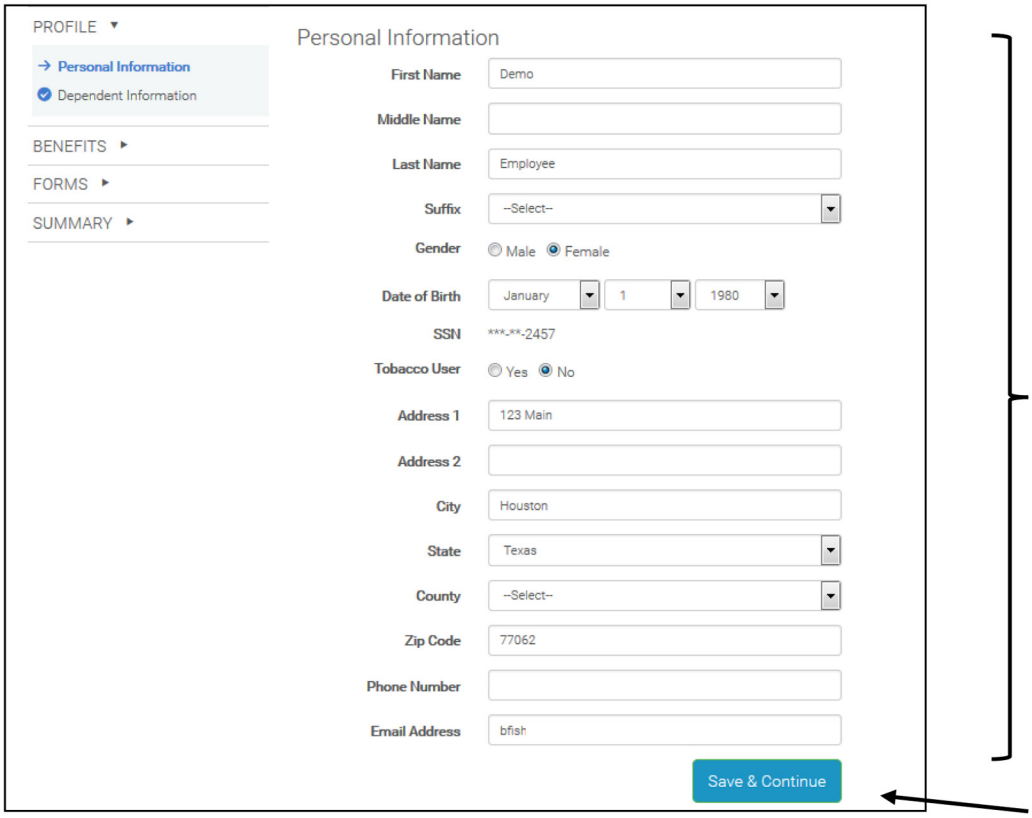
How to make New Hire or Open Enrollment Elections:

You can also view a short video on this topic at: https://youtu.be/Ep3wKmZc5_0

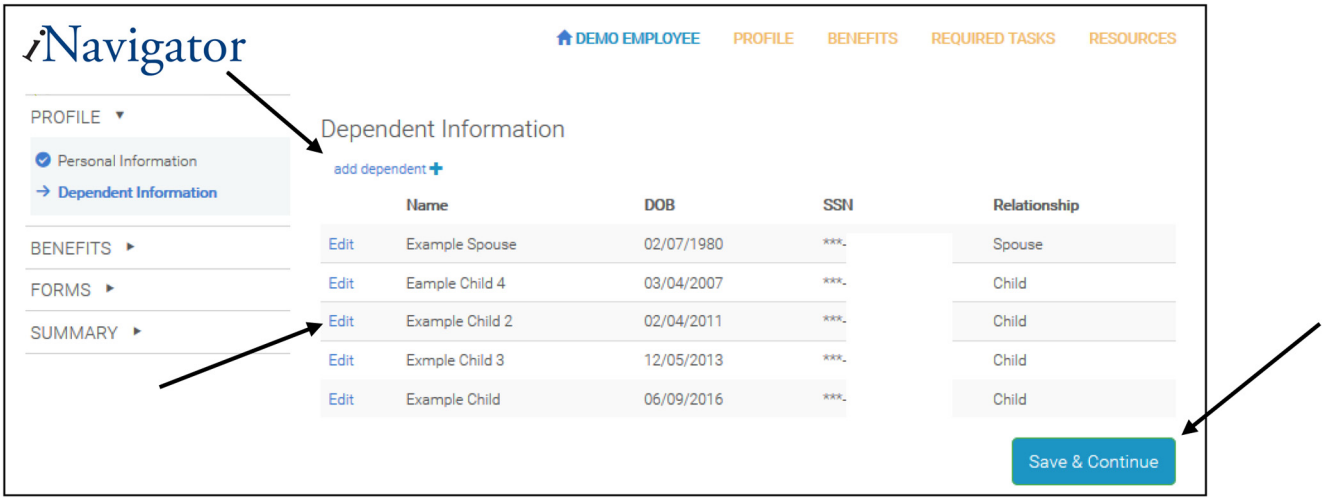
1. From the "Employee's Profile", select "New Hire Enrollment" under "MANAGE ENROLLMENTS". (The "New Hire Enrollment" link will be active up to the employee's effective date and will go inactive when the employee is not eligible for benefits anymore.)



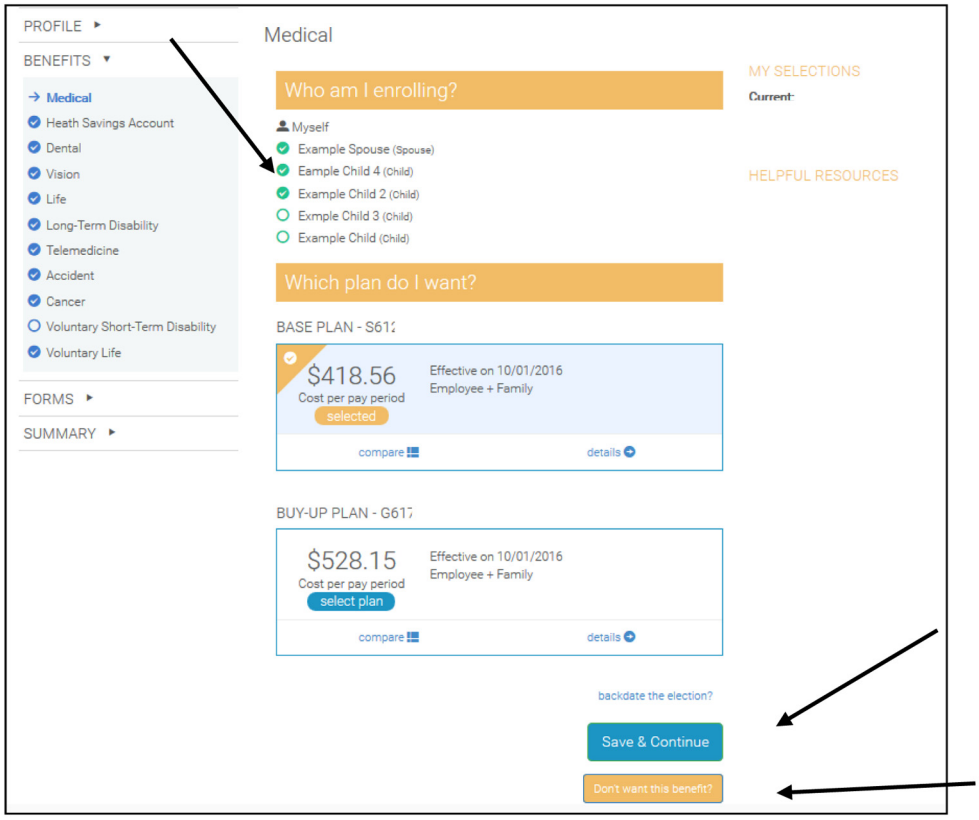
2. Verify and complete any missing personal information and press "Save & Continue" when done.



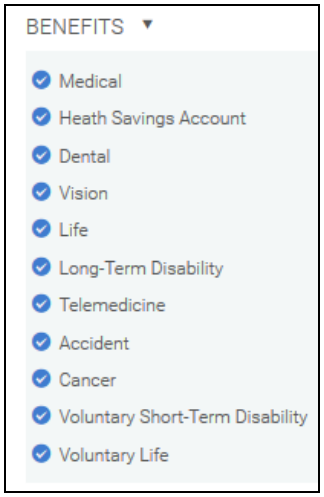
3. Next, add any dependents by selecting, “Add Dependents” or edit any current dependents by selecting “Edit” next to the dependent’s name. *<u>Any dependent that will be added to a plan MUST be added here.</u>* If the employee has no dependents or they are not adding dependents to a plan, just press “Save & Continue”.



4. Go through each “Benefit” selecting into coverage or declining coverage. For each plan, you must select which dependents you would like added to that specific plan- the cost will automatically update.



5. Once EACH plan has been elected or declined, there will be a blue check mark next to each plan letting you know you have completed all required items.

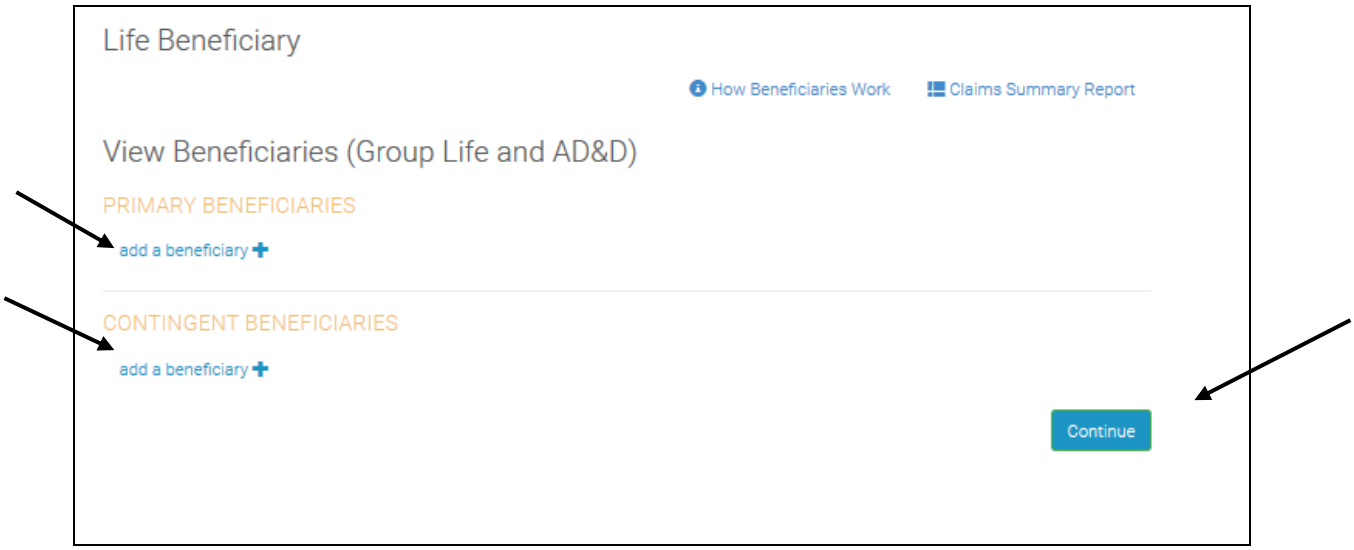


6. If applicable, the next screen will ask you to "Add a Beneficiary" for Group Life. You can establish as many beneficiaries as the employee would like (must have at least one).

If establishing multiple "Primary Beneficiaries", the "Allocation %" must equal 100%.

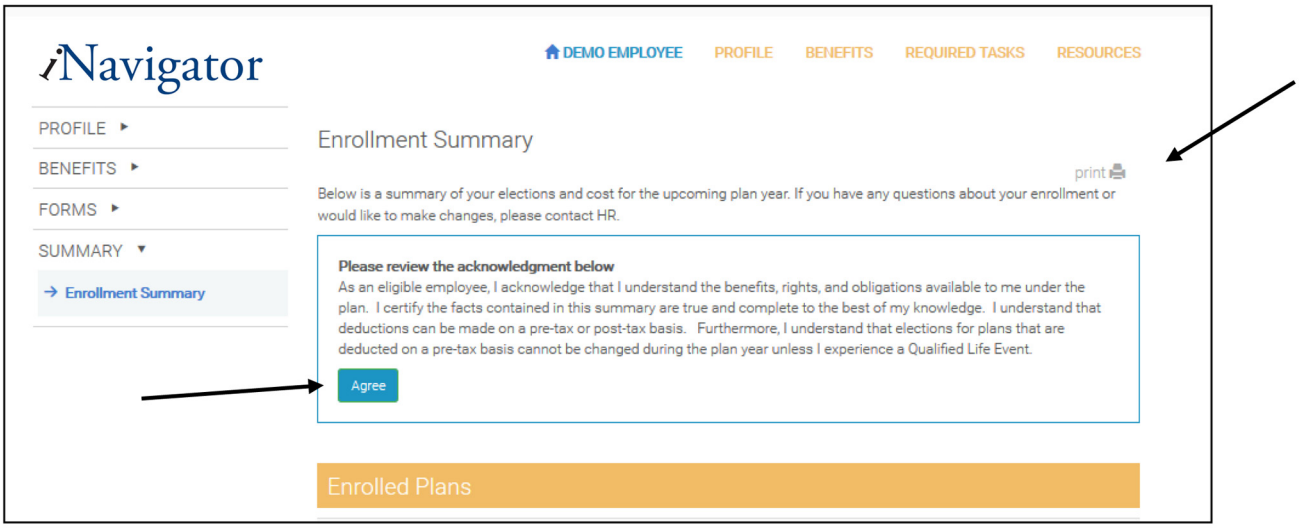
If establishing any "Contingent Beneficiaries", the "Allocation %" must equal 100%.

Press "Continue" when done.



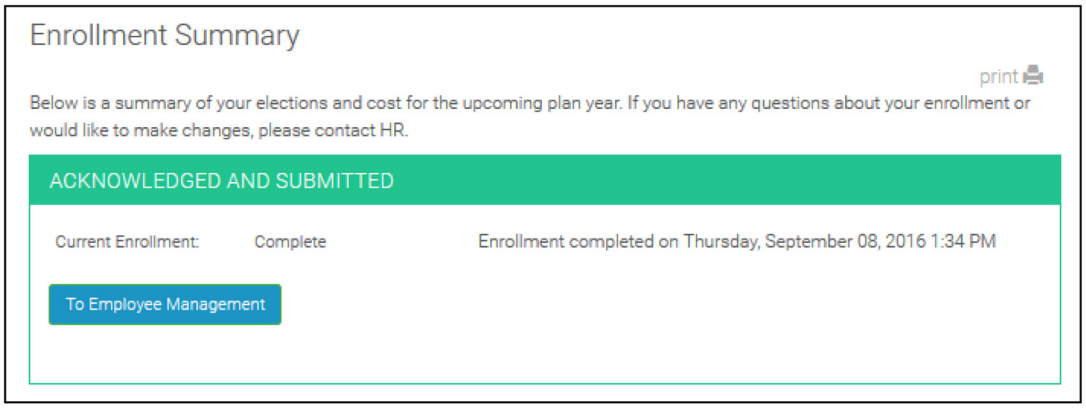
**** If employee elected Voluntary Life Insurance, complete the same steps as above.****

7. To complete or finalize the enrollment, you must press “Agree” after reading the acknowledgment statement. You can review the “Enrolled Plans”, “Total Cost per Pay Period”, “Dependents”, and “Declined Coverages” from this tab. You can also “Print” the enrollment summary for your records.



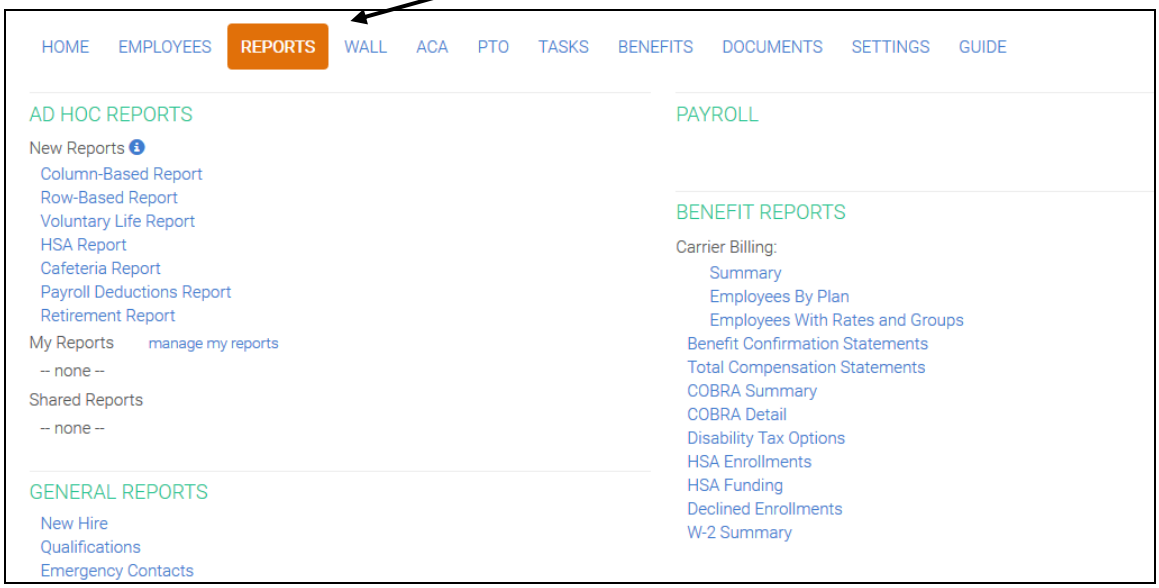
If you do not see the screen above, an item on the left is incomplete. Go back through each tab on the left and make sure you have a blue check mark.

After pressing “Agree”, you will see this to know you have submitted everything correctly:

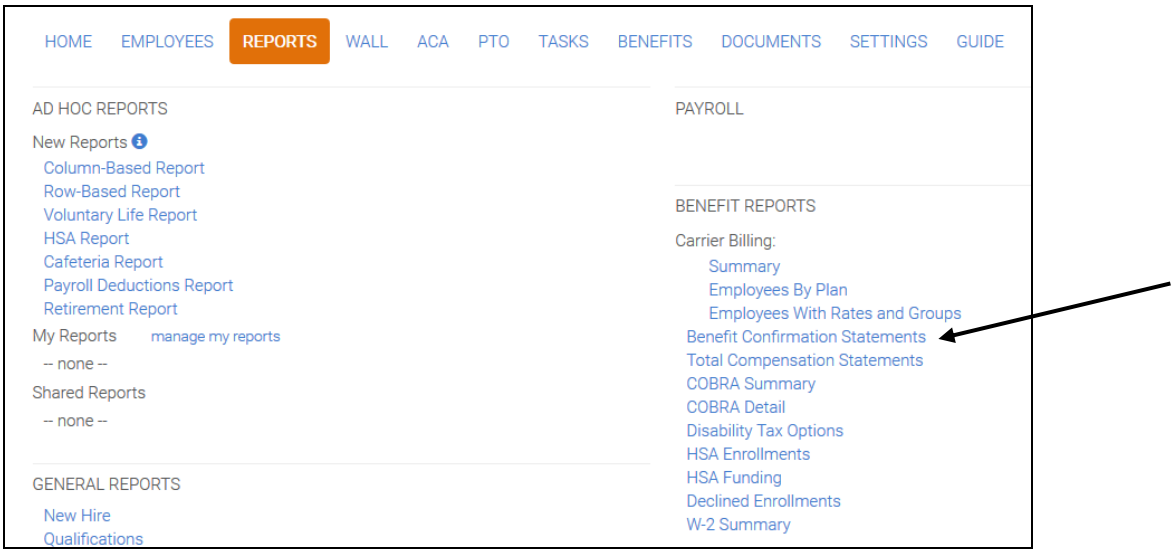


How to Print Benefit Confirmation Statements:

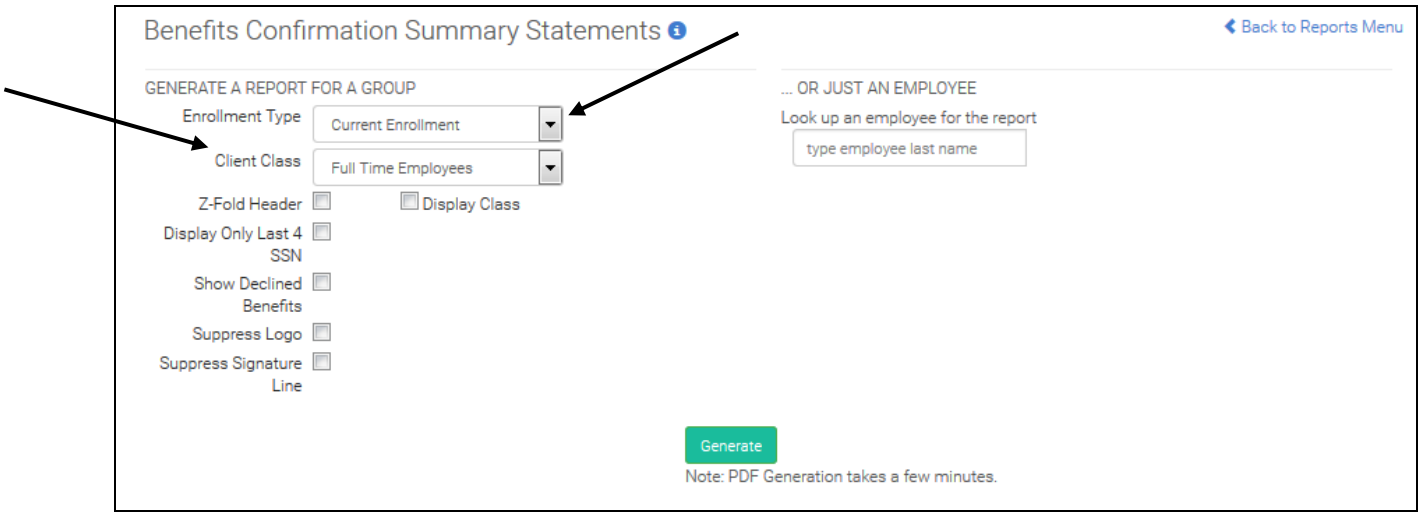
1. From your "Home" page, select "Reports".



2. Select "Benefit Confirmation Statements" under "Benefit Reports – Carrier Billing".



3. Select “Current Enrollment” under “Enrollment Type”, select the “Client Class” of the employee(s).

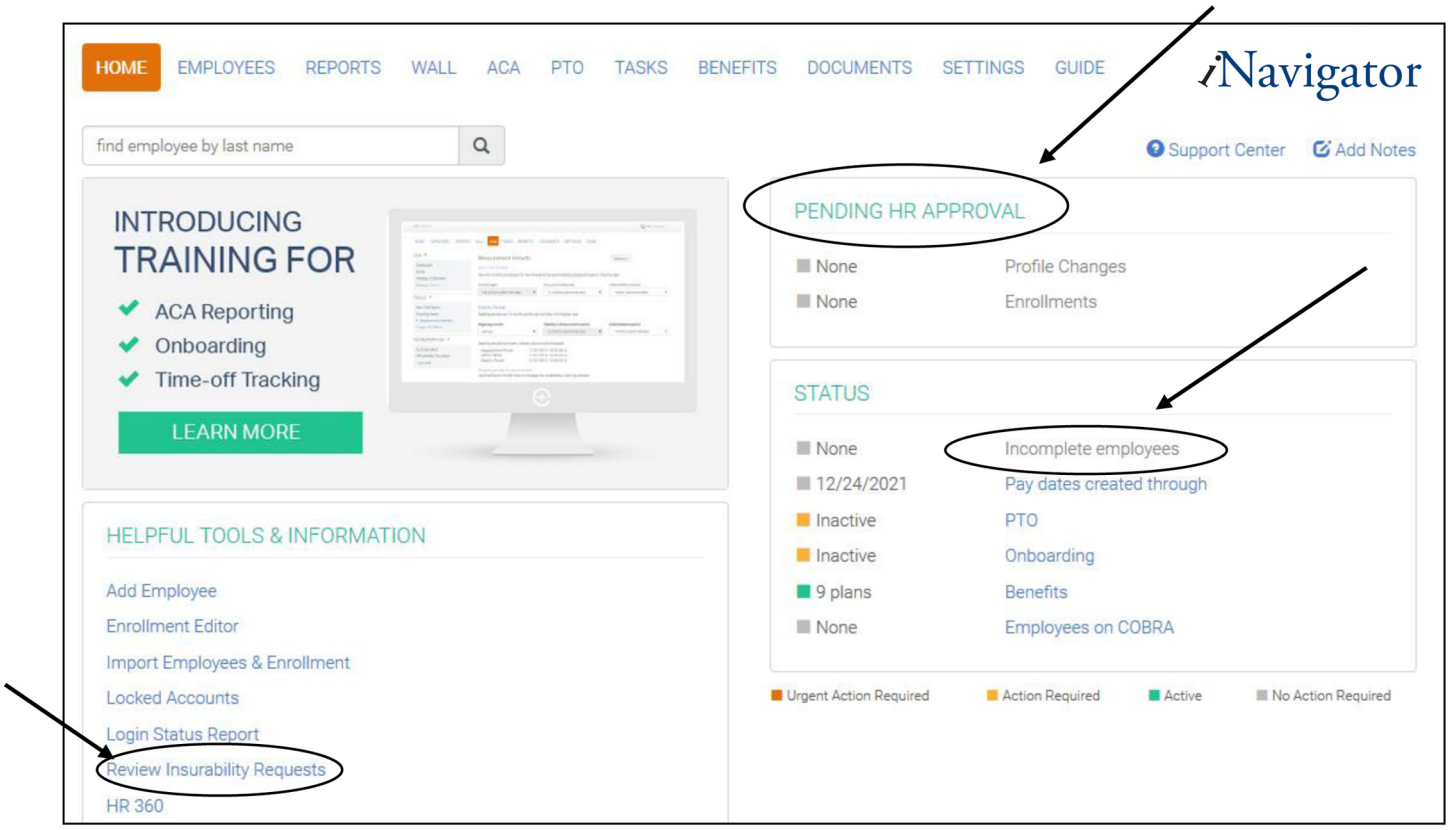


4. Type in the employee’s last name in the search box, select the employee’s name and press generate.

The report will generate a PDF summary of the employee and the plans they elected into. You can use this report for information to input into the carriers.

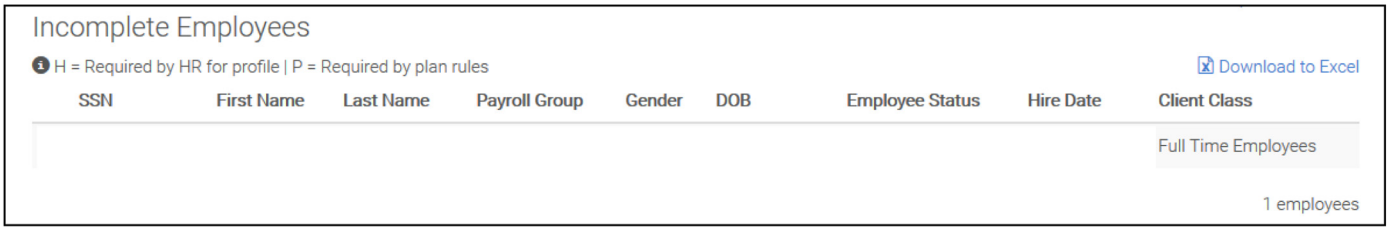
How to check for Pending HR Approval, Incomplete Employees & Review Insurability Requests:

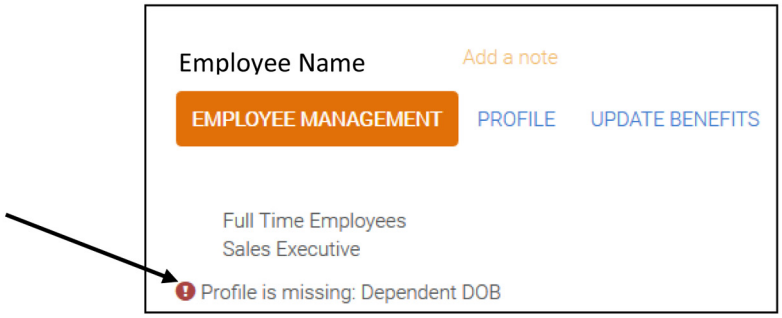
1. From your "Home" page, you can view any items "Pending HR Approval", any "Incomplete Employees", and "Review Insurability Requests".



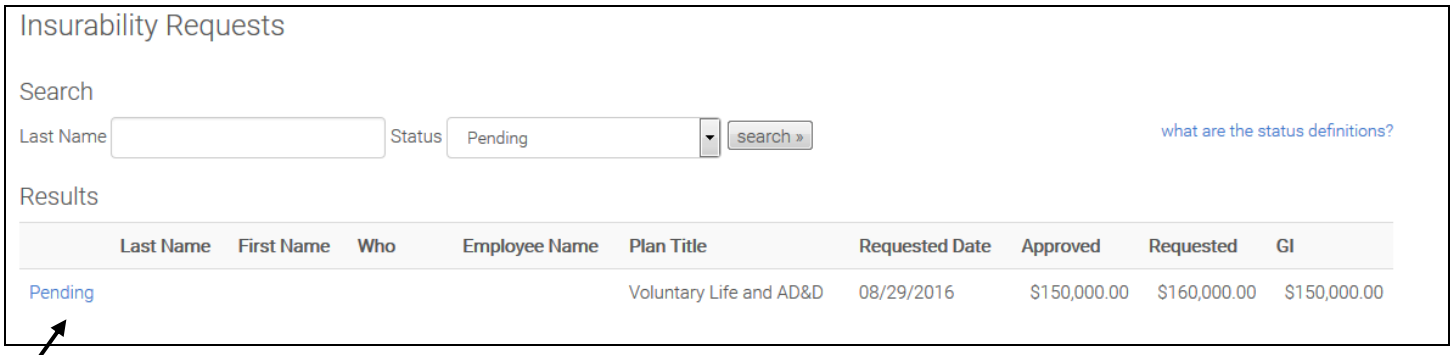
"Pending HR Approval" – if any enrollment or profile changes need your approval, click on the link to review the request. Approve or decline as necessary.

"Incomplete Employees" – if any employees are incomplete, click on the link to view the employee(s). Go back to your "Home" page, search the employee and correct what is incomplete.

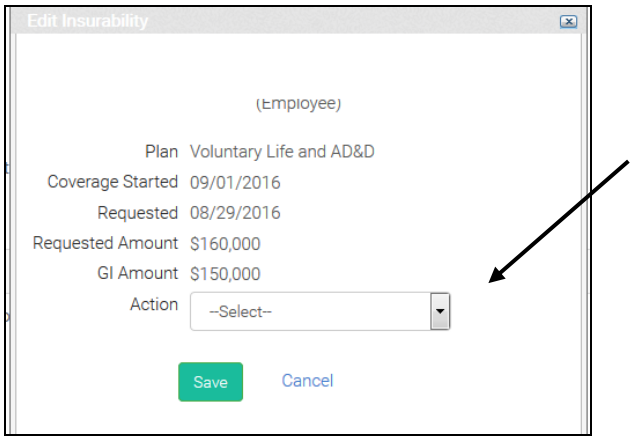




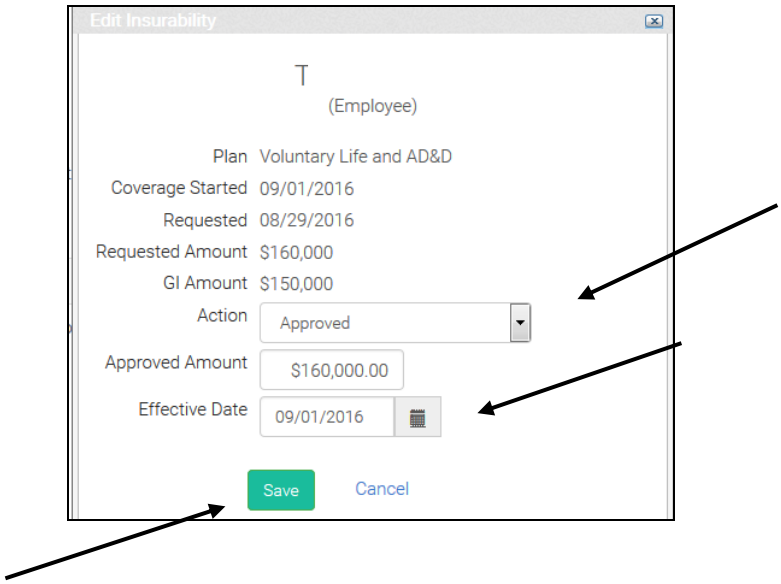
"Review Insurability Requests" – click on the link to approve any pending Voluntary Life amounts. Click "Pending" next to the employee's name to review the Voluntary Life Request.



Select the drop down by "Action" and choose the appropriate action. (*Things to think about: does the employee need to complete an Evidence of Insurability Form (EOI)? Has the employee completed the EOI? Has the insurance carrier approved or declined the pending amount?)*

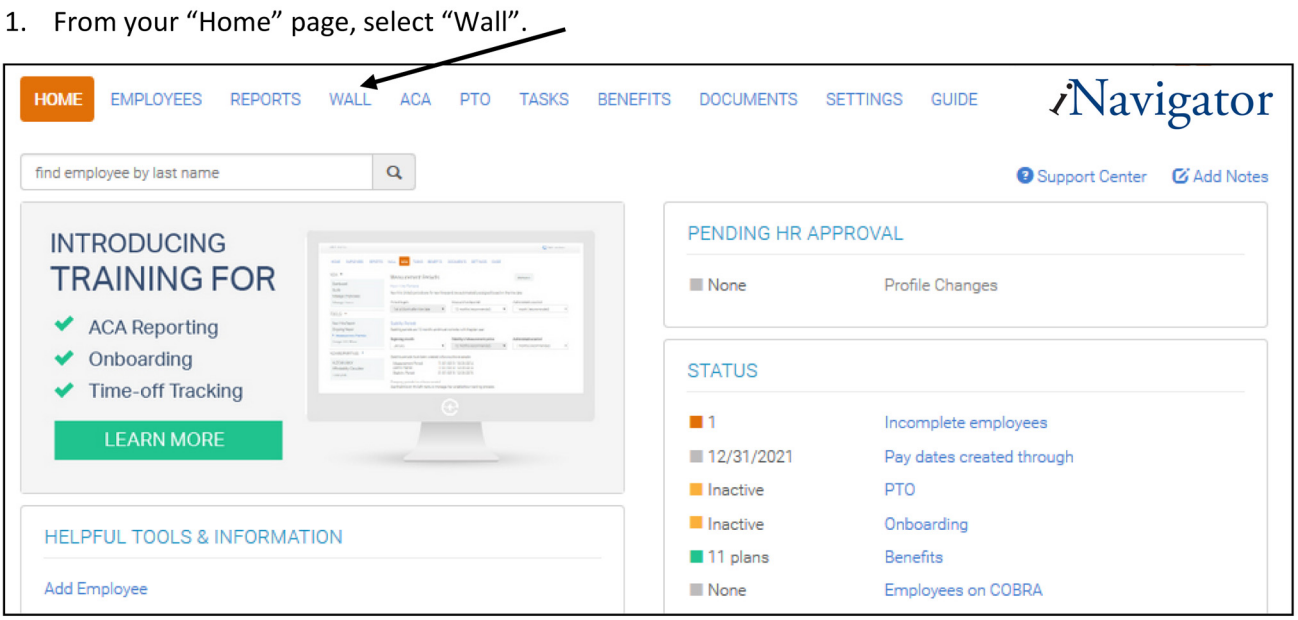


If the employee has been approved by the insurance carrier, choose "Approved", enter the "Effective Date" and press "Save".

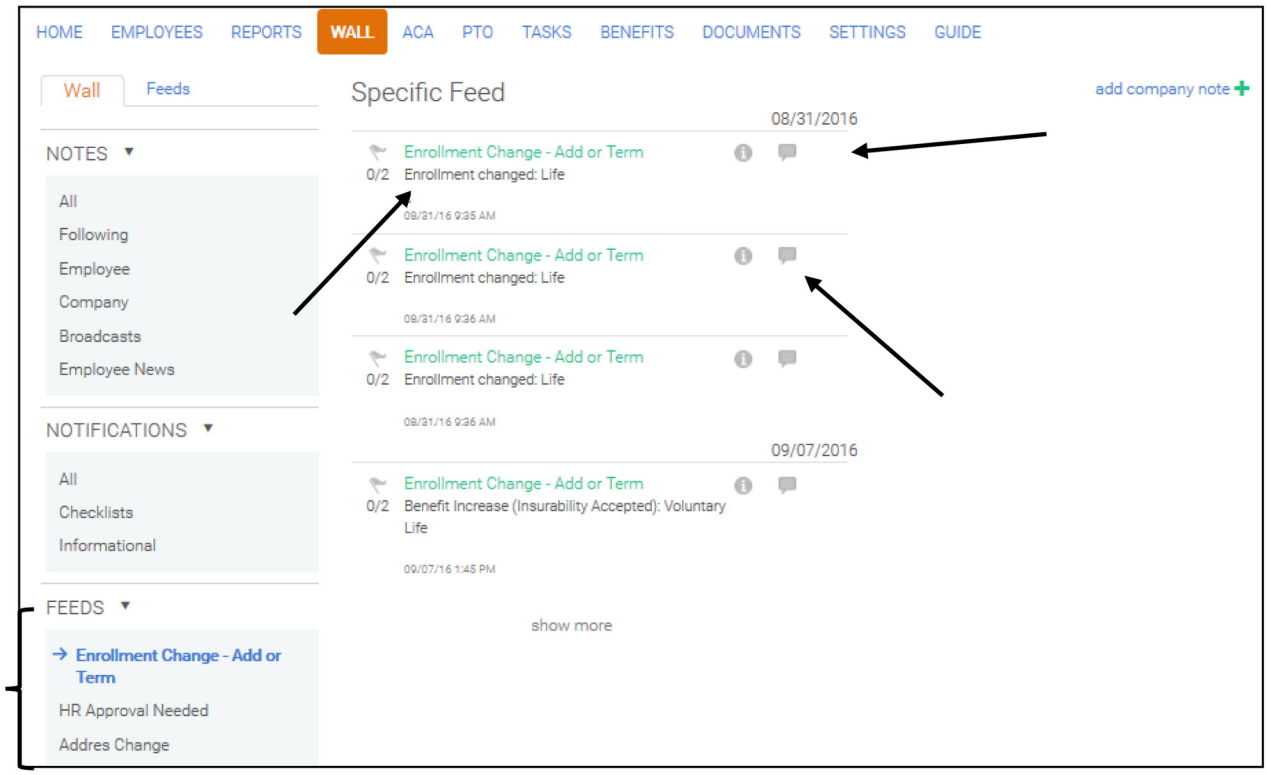


How to Check Wall for Updates:

1. From your "Home" page, select "Wall".



2. You can view all "Feeds" at once or view by each specific "Feed" by selecting the links under "FEEDS". Example "Wall Feed" is shown below.



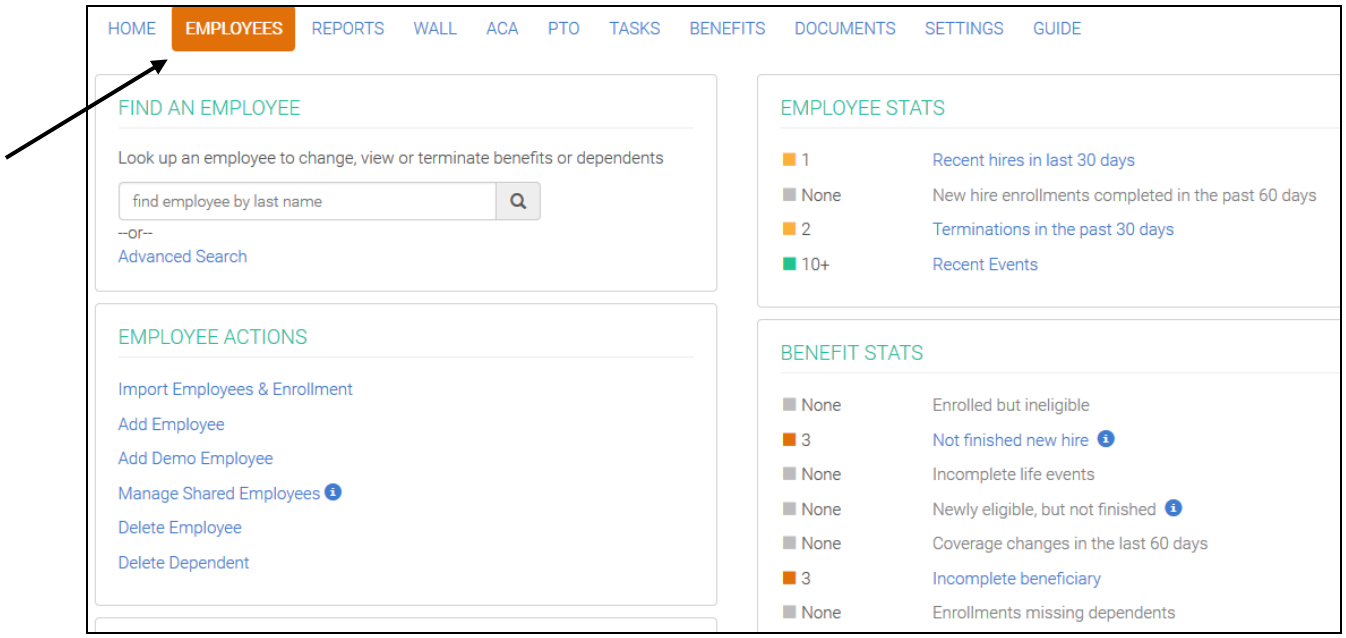
Select the numbers (ex. 0/2) under the flag next to each "Feed", to view a checklist of items that may need to be completed for that "Feed".

Select the "i" to view information about the "Feed".

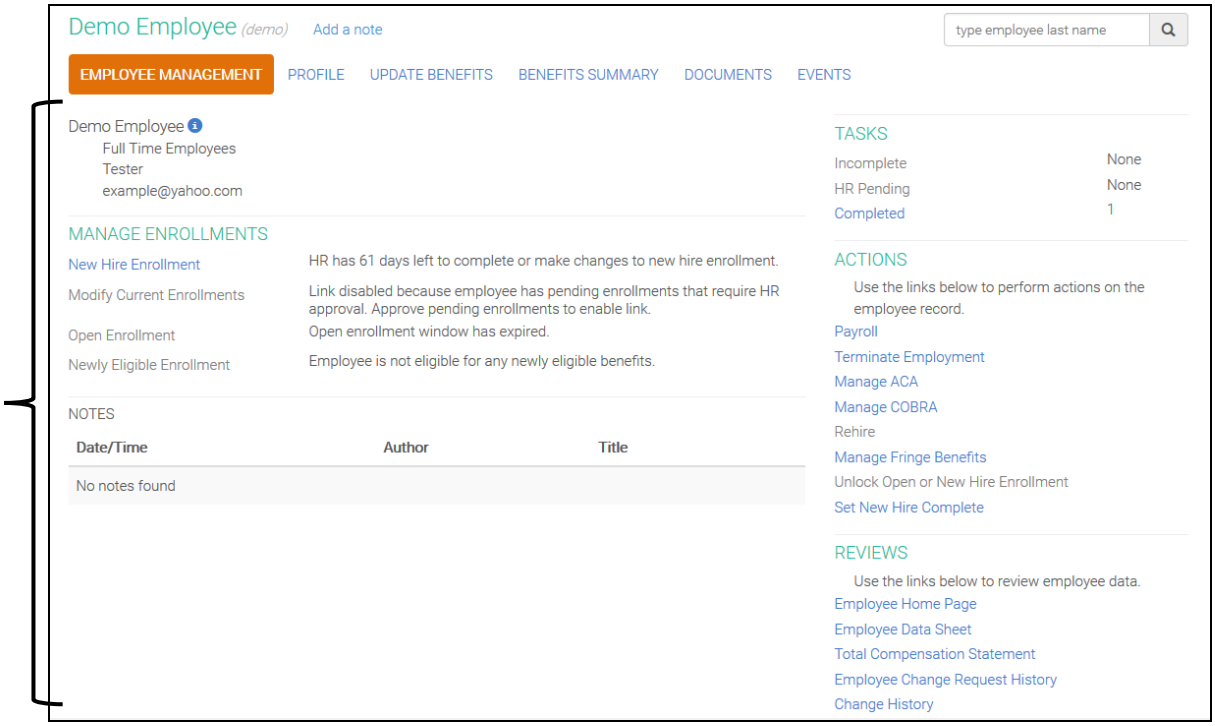
You can add a comment or an update by selecting the speech bubble.

How to view an Employee's Enrollment Summary & Deductions:

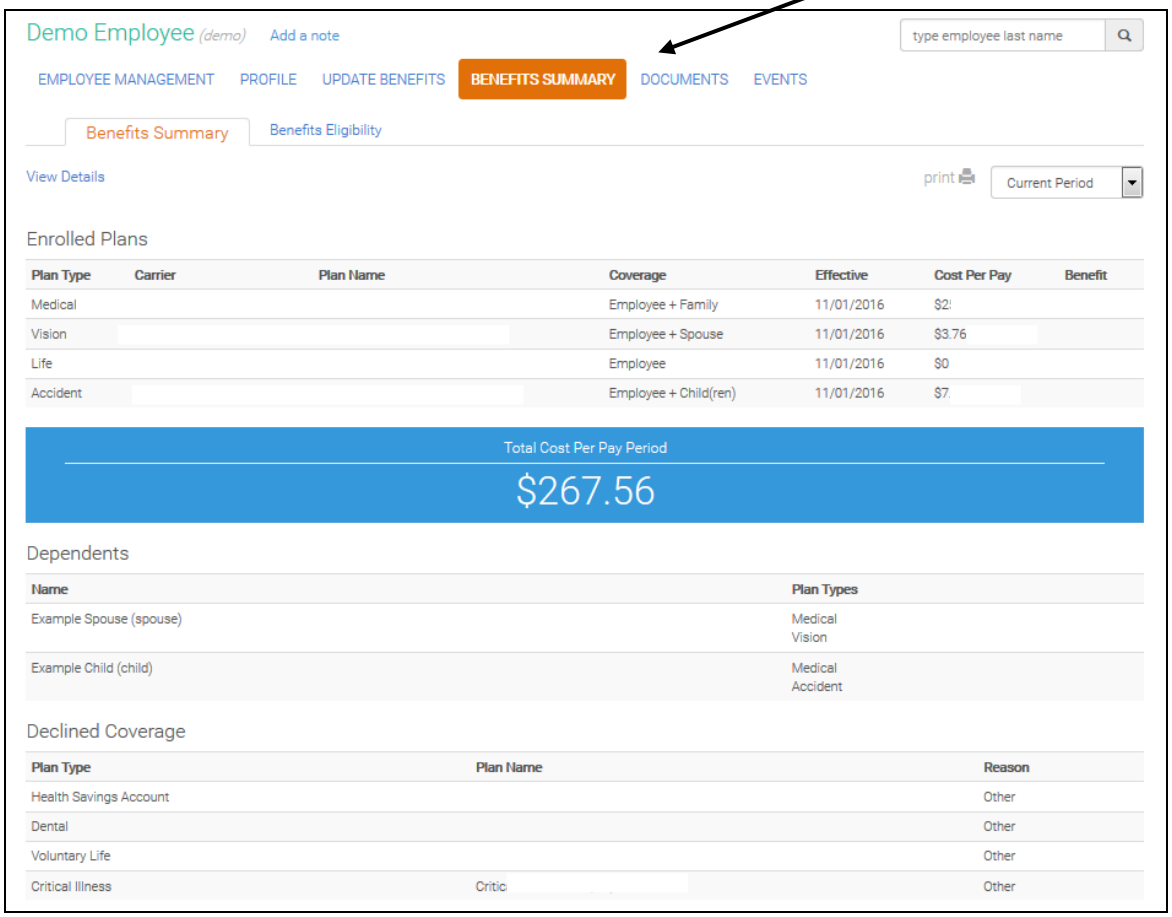
1. From the Home Page, select "Employees".



2. Search the employee by their last name and select the employee's name. It will take you to the employee's profile where you can manage the employee.



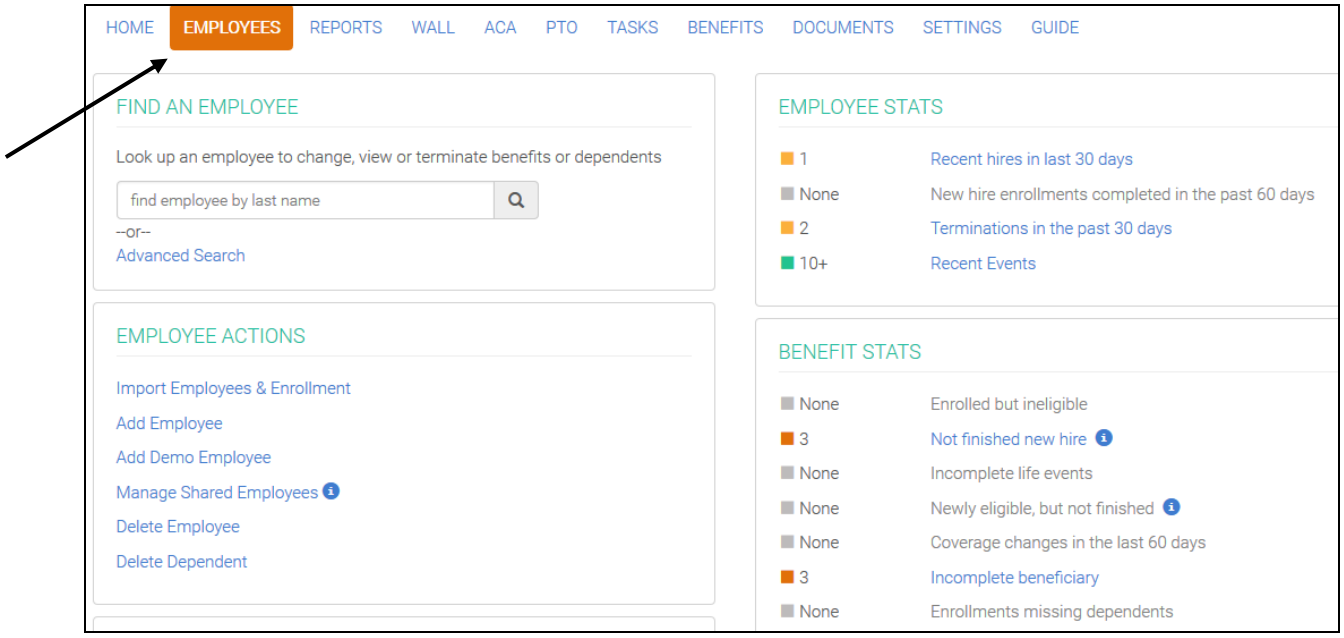
3. To view their Enrollment Summary, select the "Benefits Summary" tab. You can view each plan the employee is enrolled in, the effective date of each plan, the cost of each plan per pay, dependents enrolled on which plan, which plans the employee waived, and the total cost per pay period.



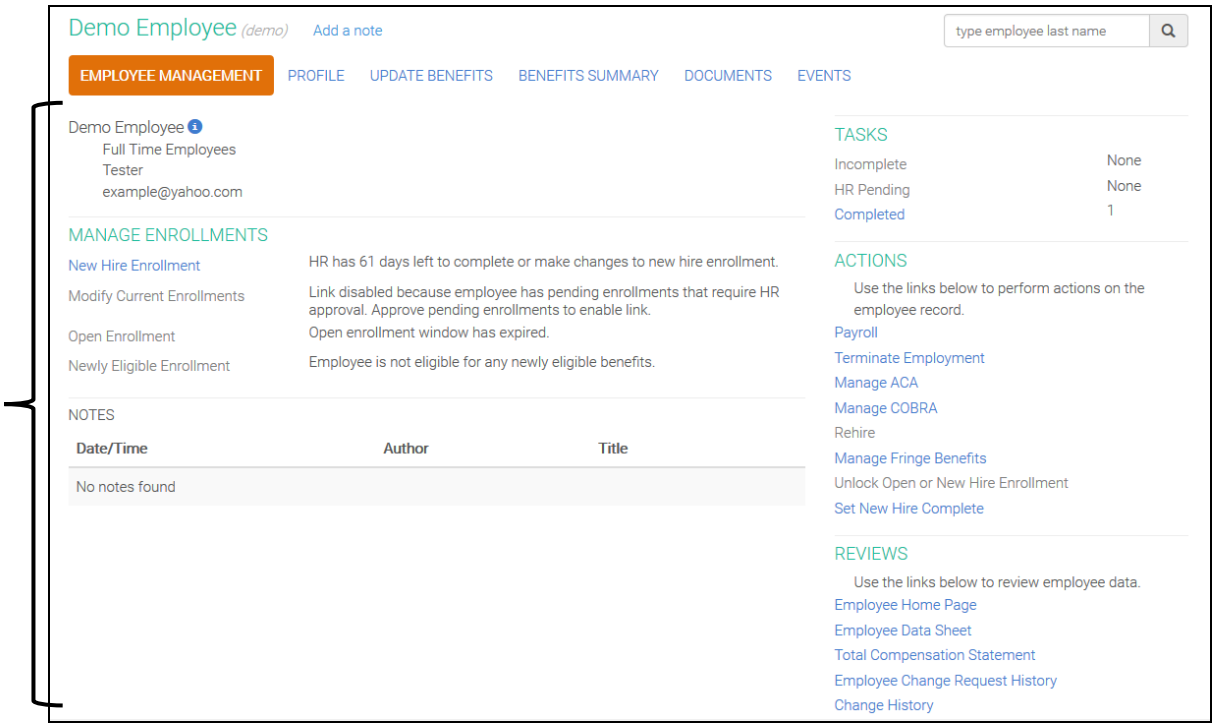
How to process a Qualified Life Event (HR):

All Qualified Life Events must be processed through Employee Navigator and with the carriers within 30 days of the Life Event.

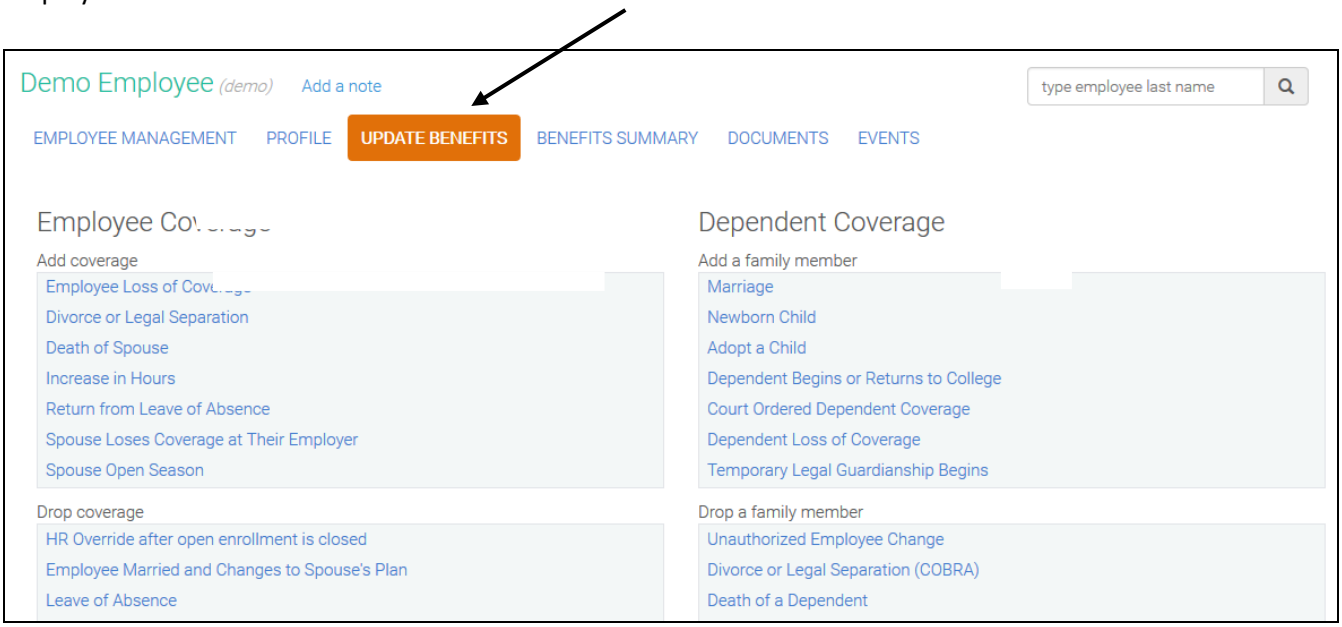
1. From the Home Page, select "Employees".



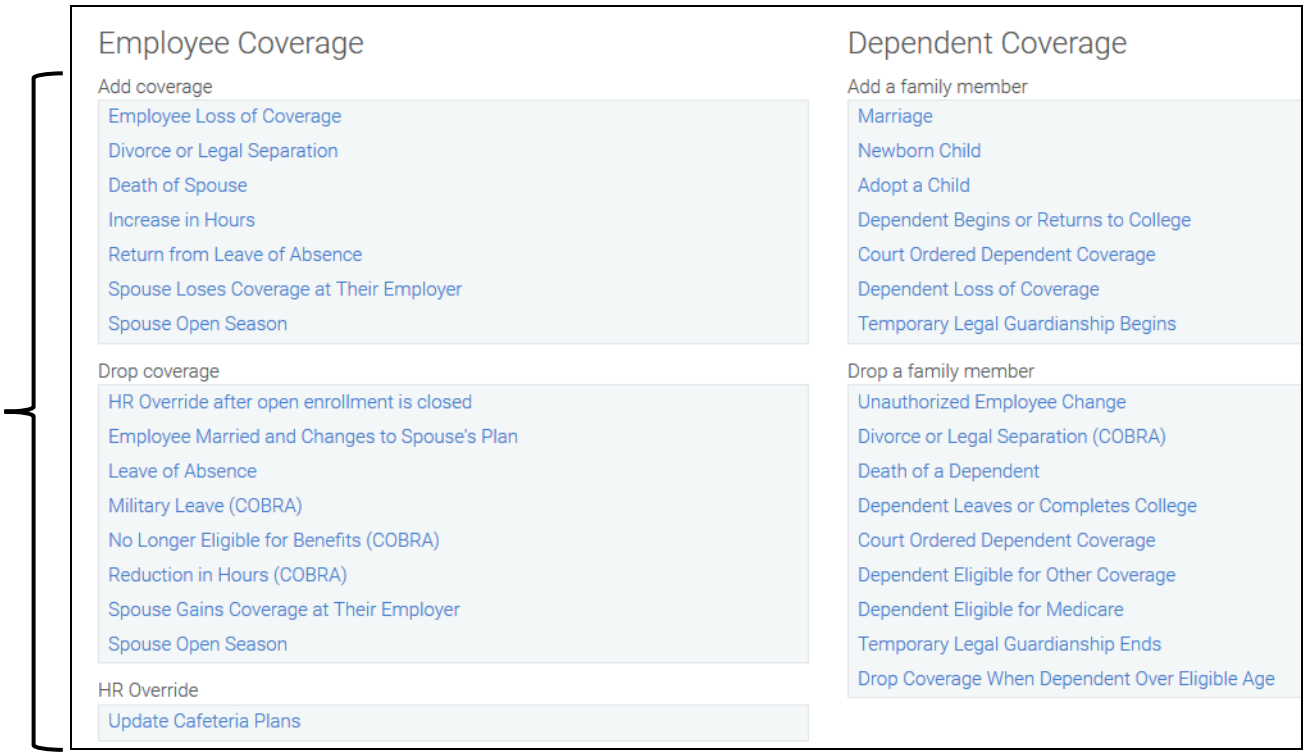
2. Search the employee by their last name and select the employee's name. It will take you to the employee's profile where you can manage the employee.



3. To update an Employee's elections when they experience a Qualified Life Event (these must be processed with Employee Navigator and the carriers **within 30 days** of the event), select "Update Benefits" from the Employee's Profile.



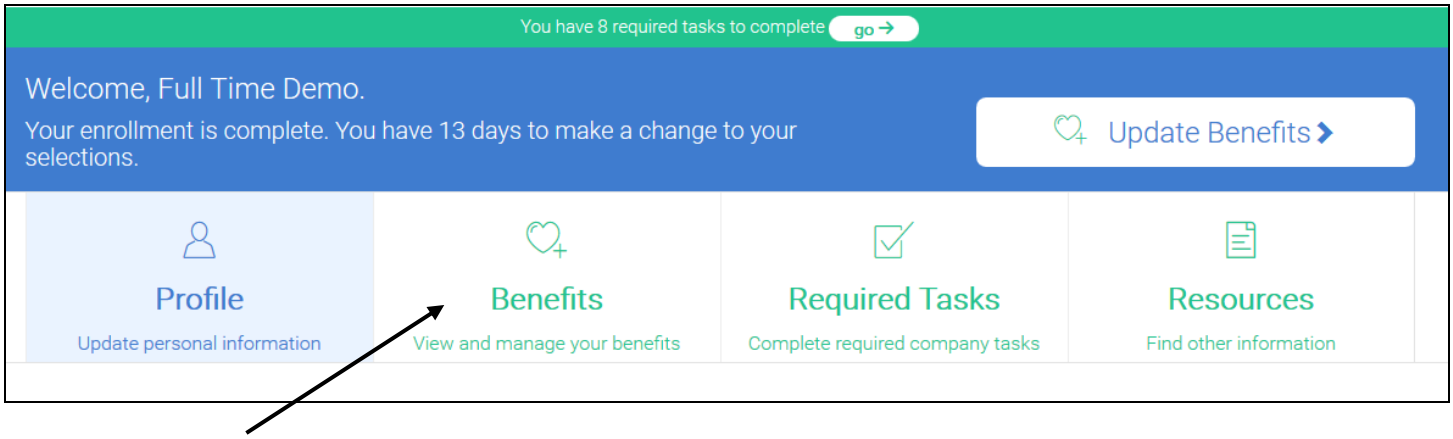
4. Select the necessary life event and process the change.



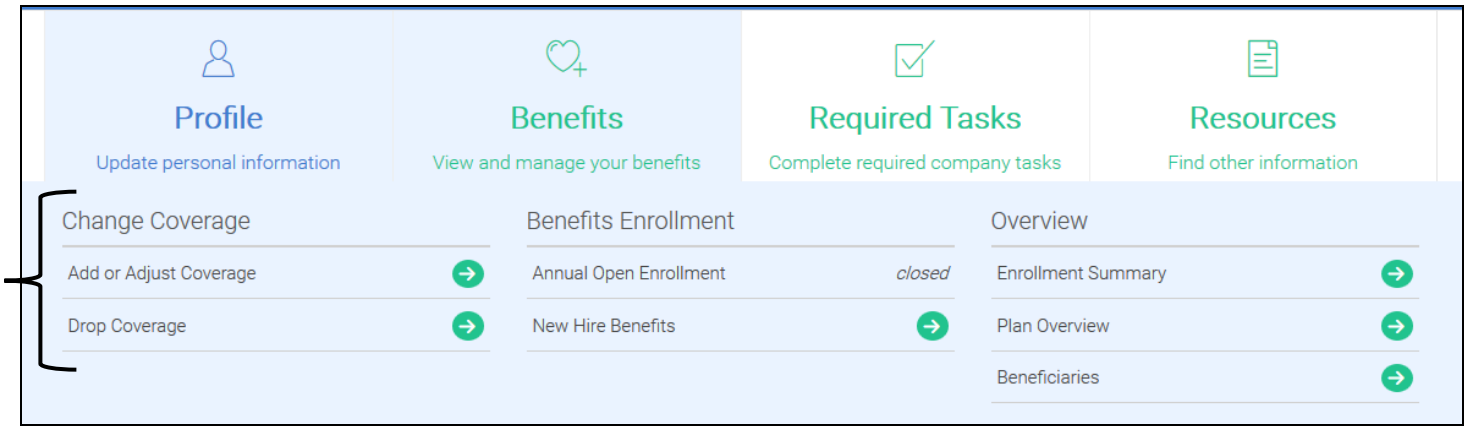
How an Employee processes a Qualified Life Event:

All Qualified Life Events must be processed through Employee Navigator and with the carriers within 30 days of the Life Event.

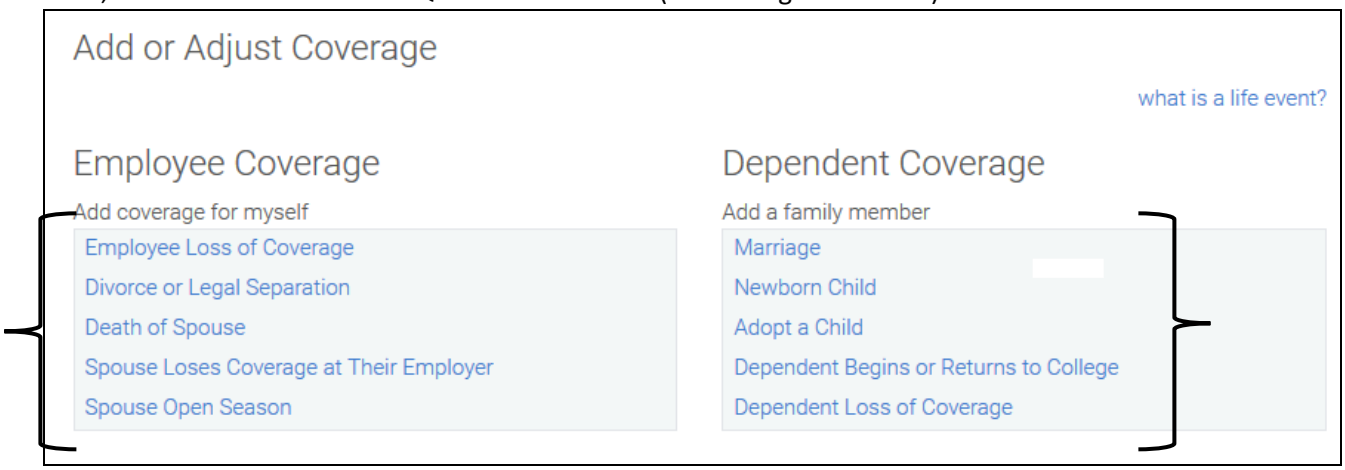
1. Once the Employee is logged in, select, "Benefits".



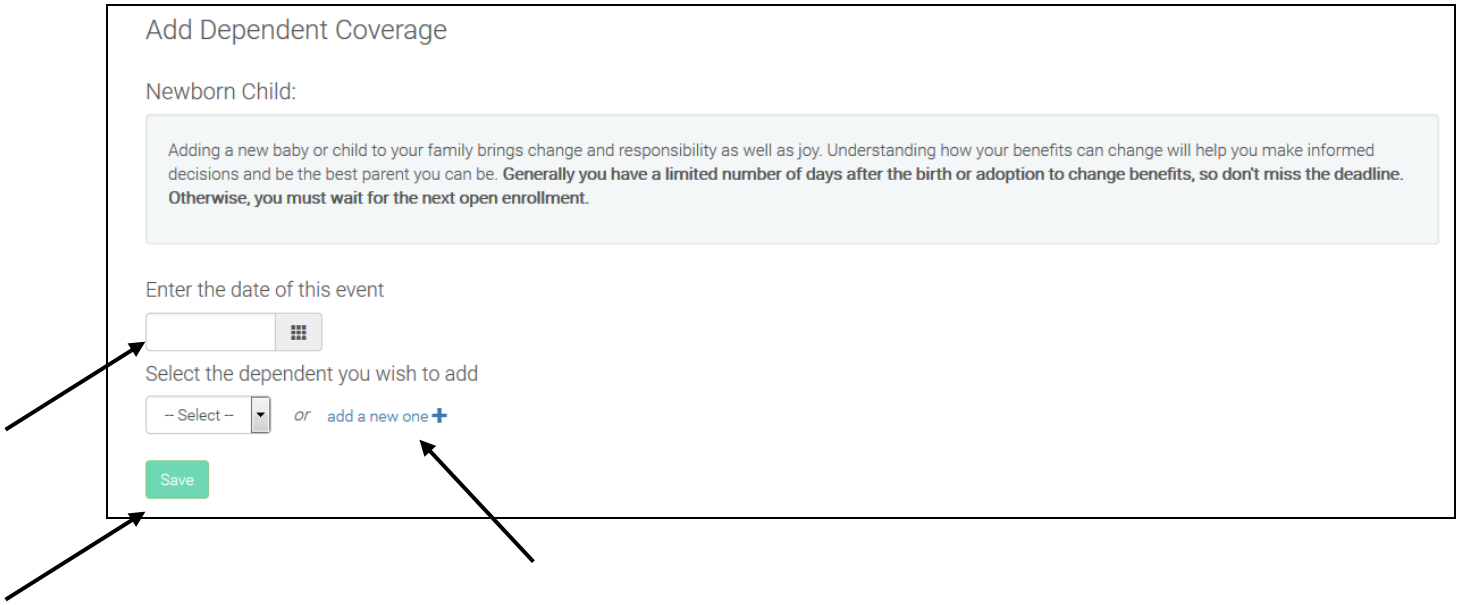
2. Next, depending on the type of Qualified Life Event, select "Add or Adjust Coverage" OR "Drop Coverage".



3. Then, select the reason for the Qualified Life Event. (ex. Adding a Newborn).



4. Enter the date of the event (ex. the day the child was born), “Add a New” dependent and press “Save”.

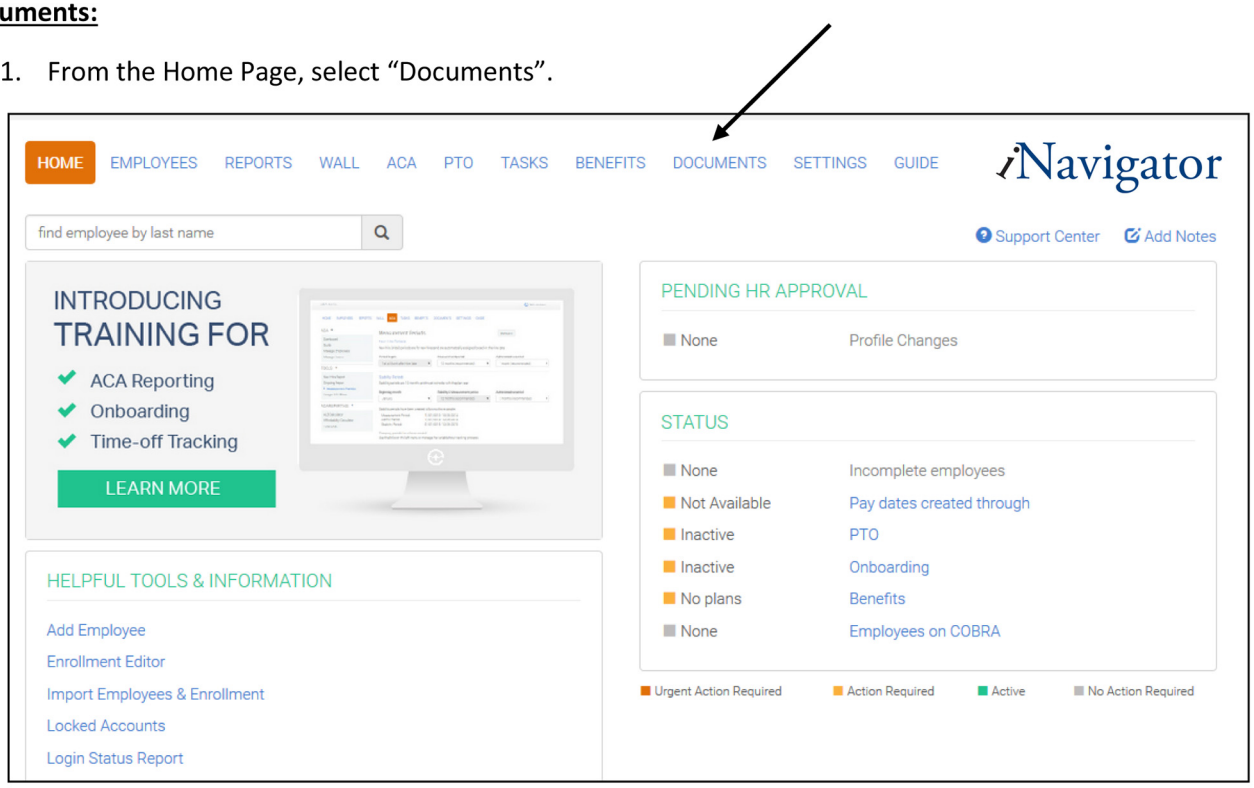


Please submit supporting documentation to your HR for the qualified life event.

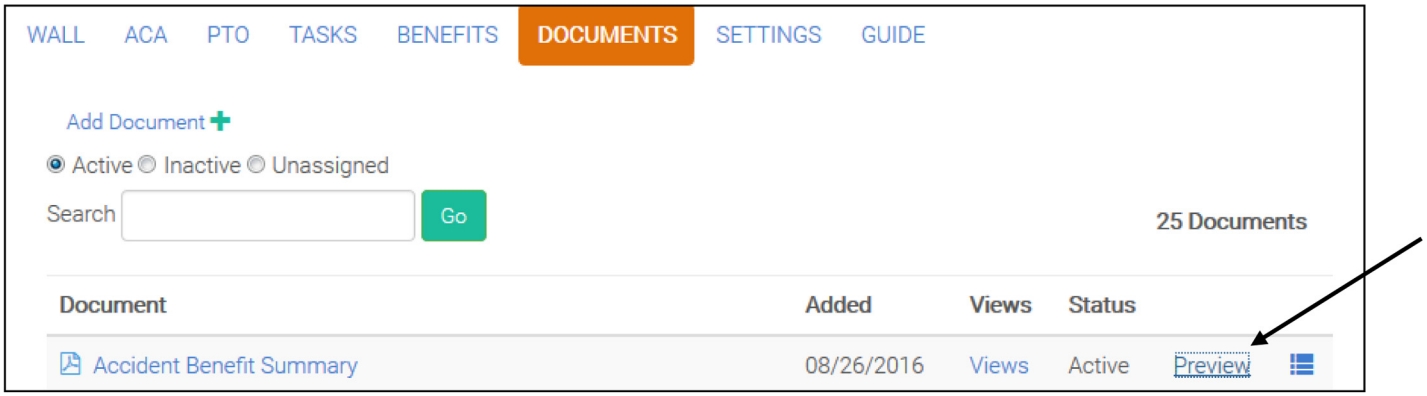
If you are trying to process the qualified life event outside the 30-day window, you will be errored out and will have to wait until next open enrollment to make changes.

How to View and Print Benefit Summaries, Claim Forms, Evidence of Insurability Forms, & other Plan Documents:

1. From the Home Page, select "Documents".

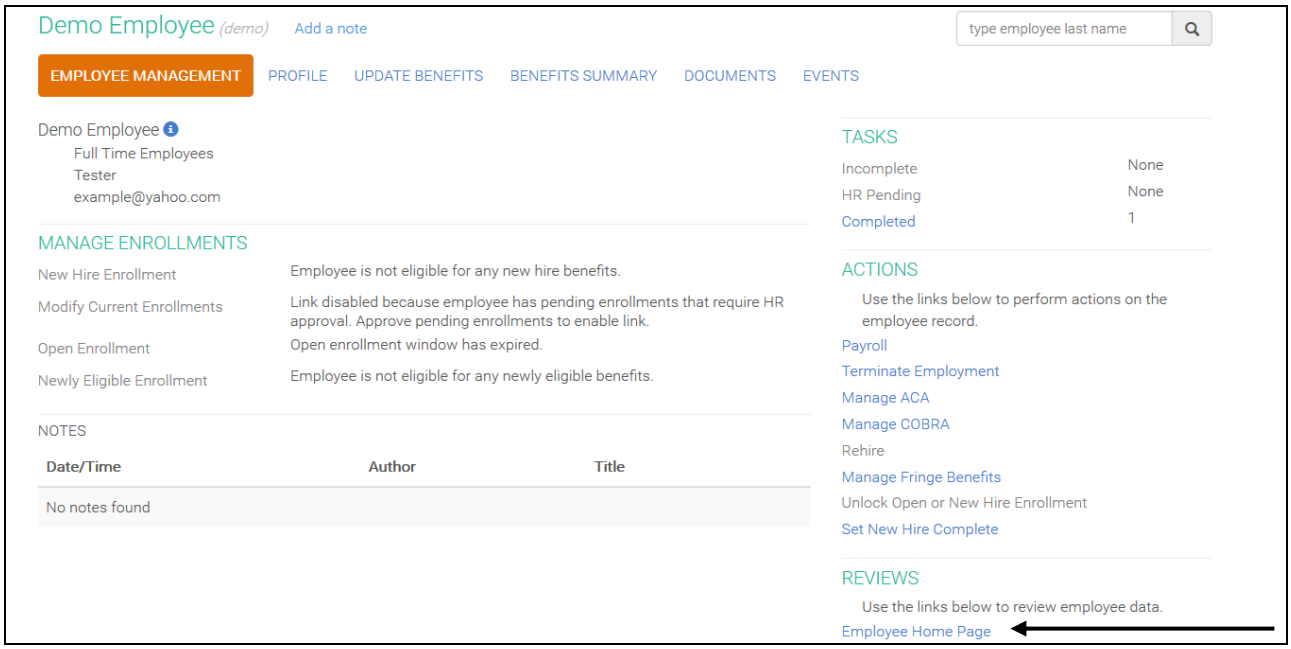


2. You can "Preview" each document to download and print.

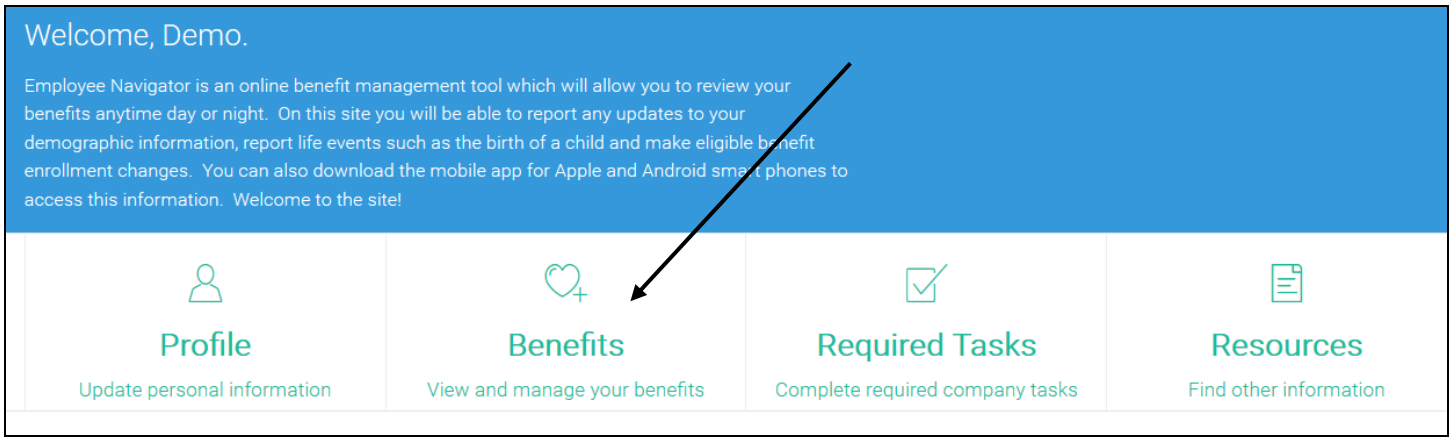


How to Update a Beneficiary from the Employee's Home Page:

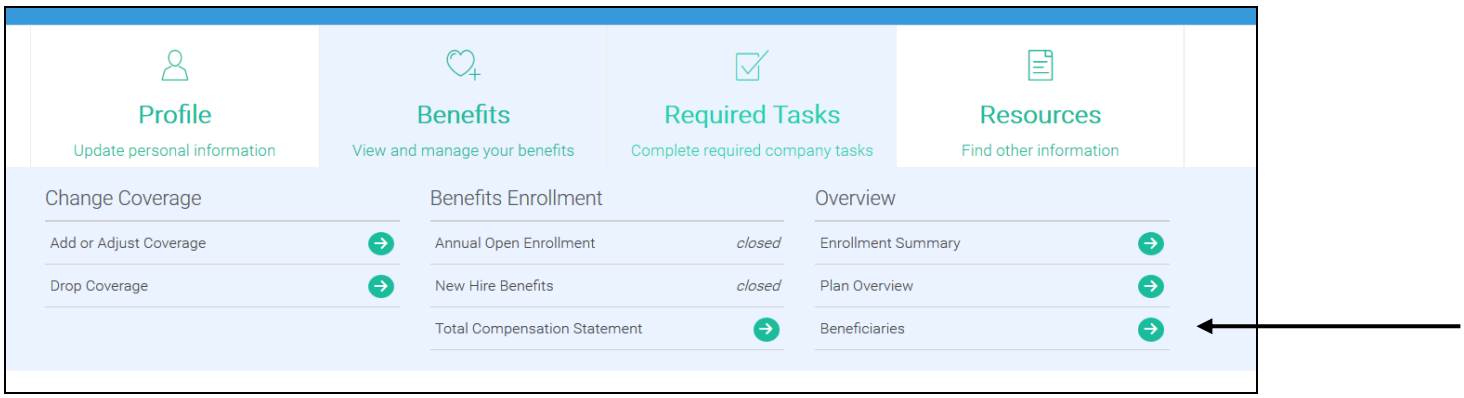
1. Search the employee and select, "Employee Home Page" under "REVIEWS".



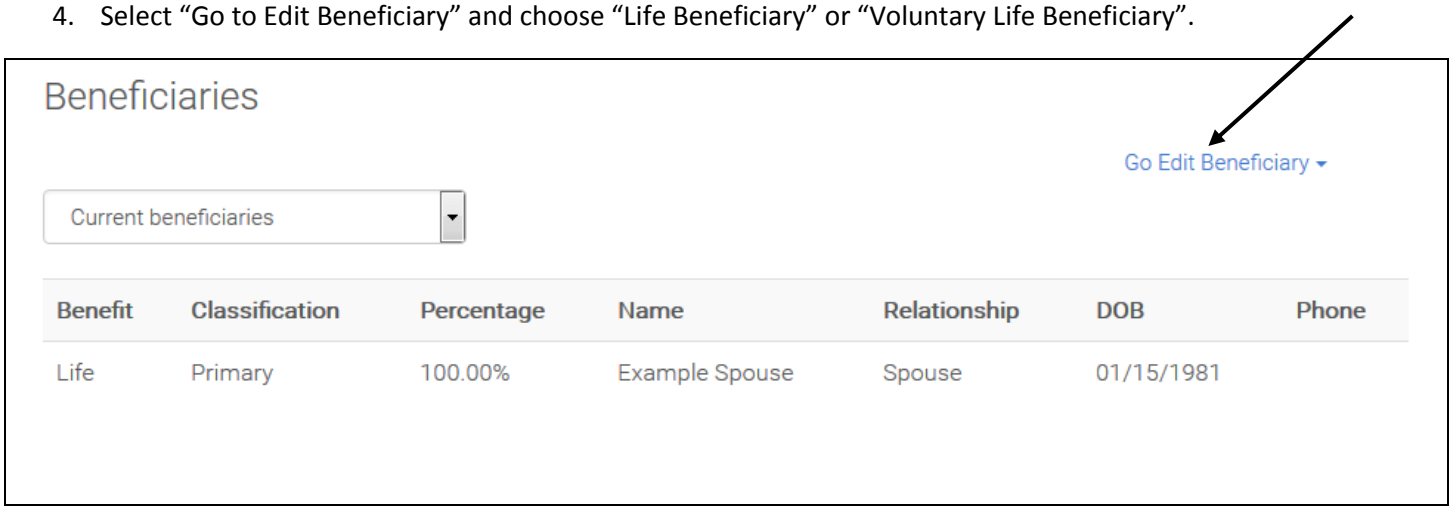
2. Select "Benefits" once you are on the employee's home page.



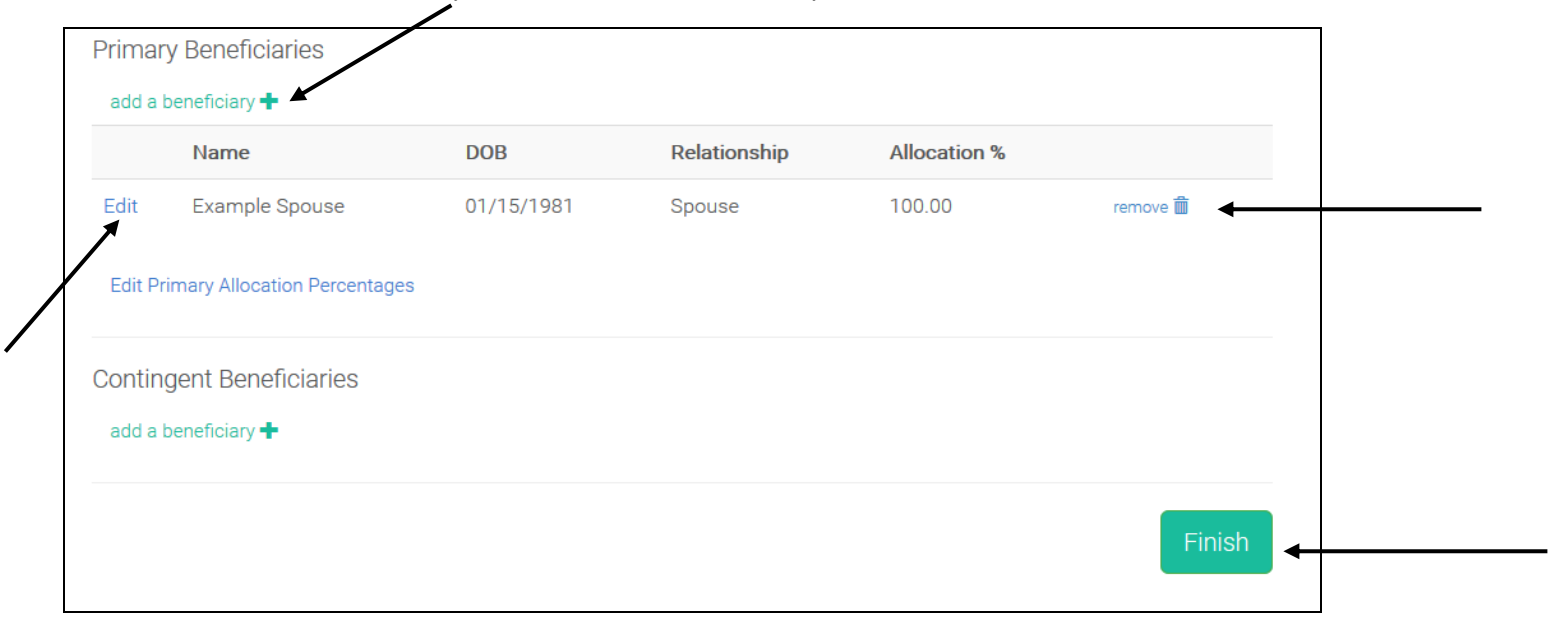
3. Select "Beneficiaries".



4. Select “Go to Edit Beneficiary” and choose “Life Beneficiary” or “Voluntary Life Beneficiary”.

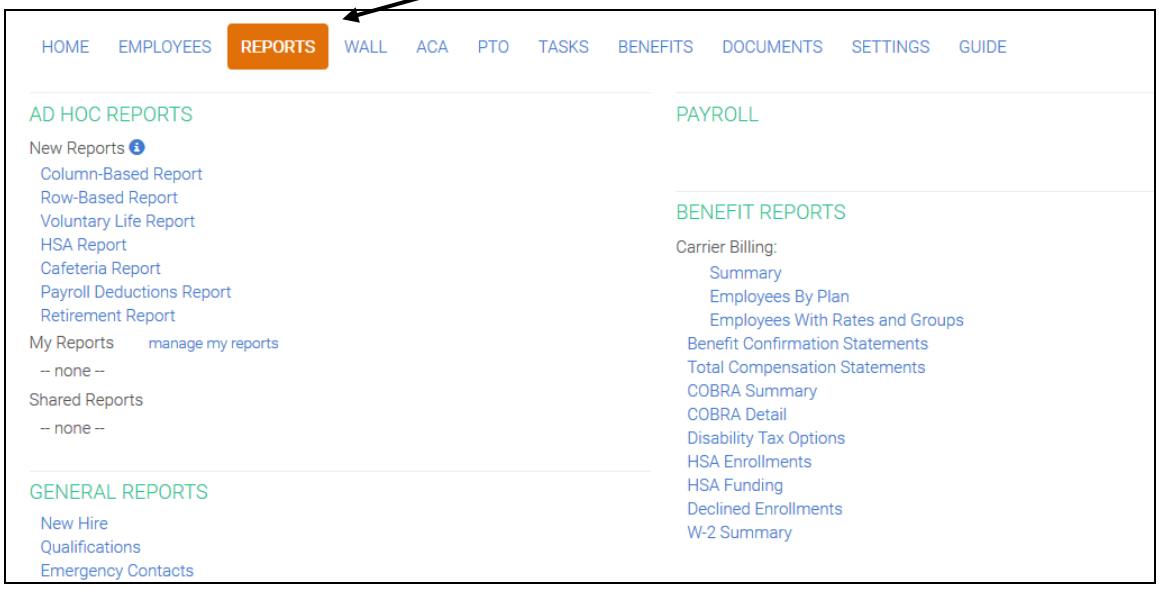


5. “Edit”, “Add a beneficiary” or “Remove” the beneficiary. Press “Finish” when done.



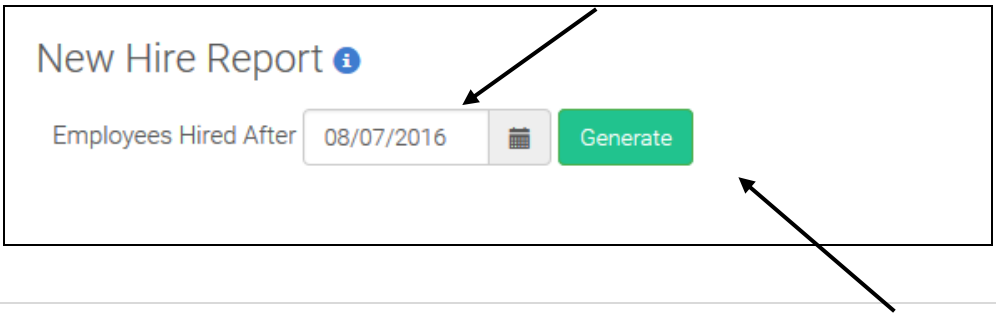
How to Run a New Hire Report:

1. From your "Home" page, select "Reports".

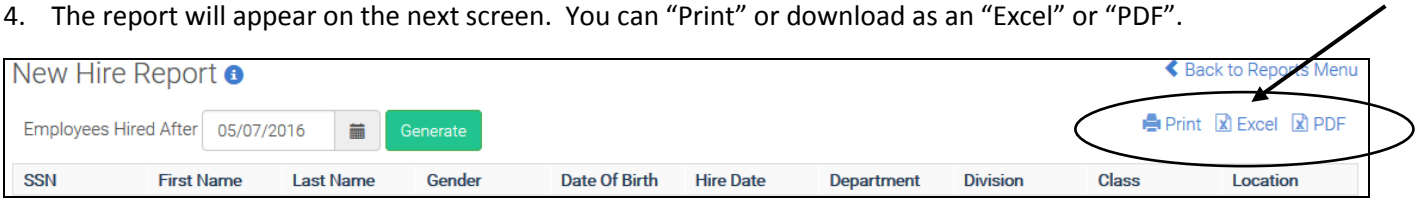


2. Select "New Hire" under "General Reports".

3. Enter the Date in which you would like to search and press "Generate".

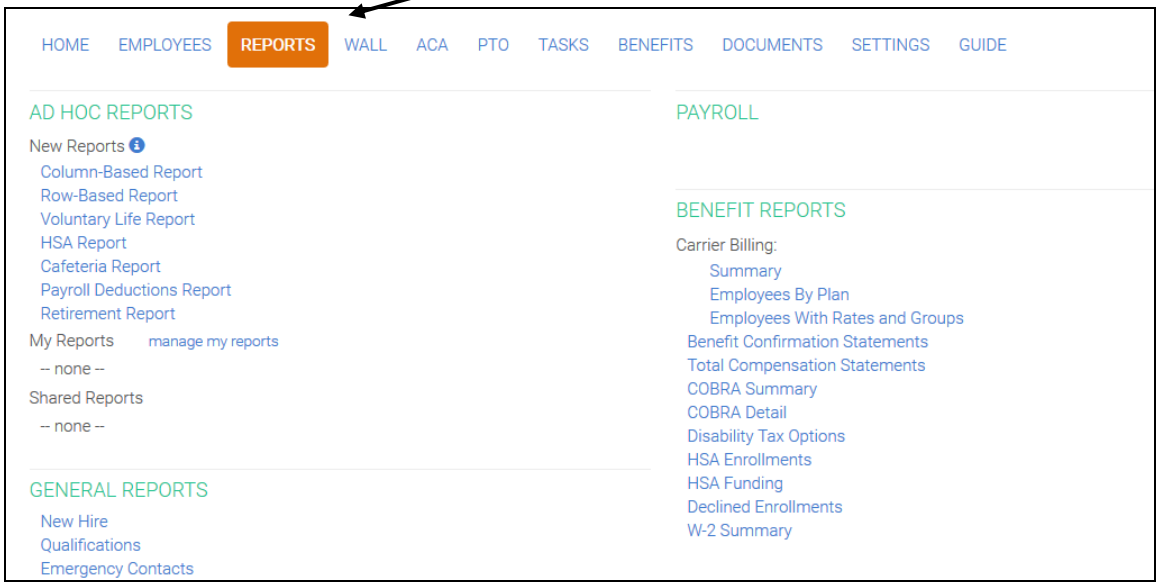


4. The report will appear on the next screen. You can “Print” or download as an “Excel” or “PDF”.



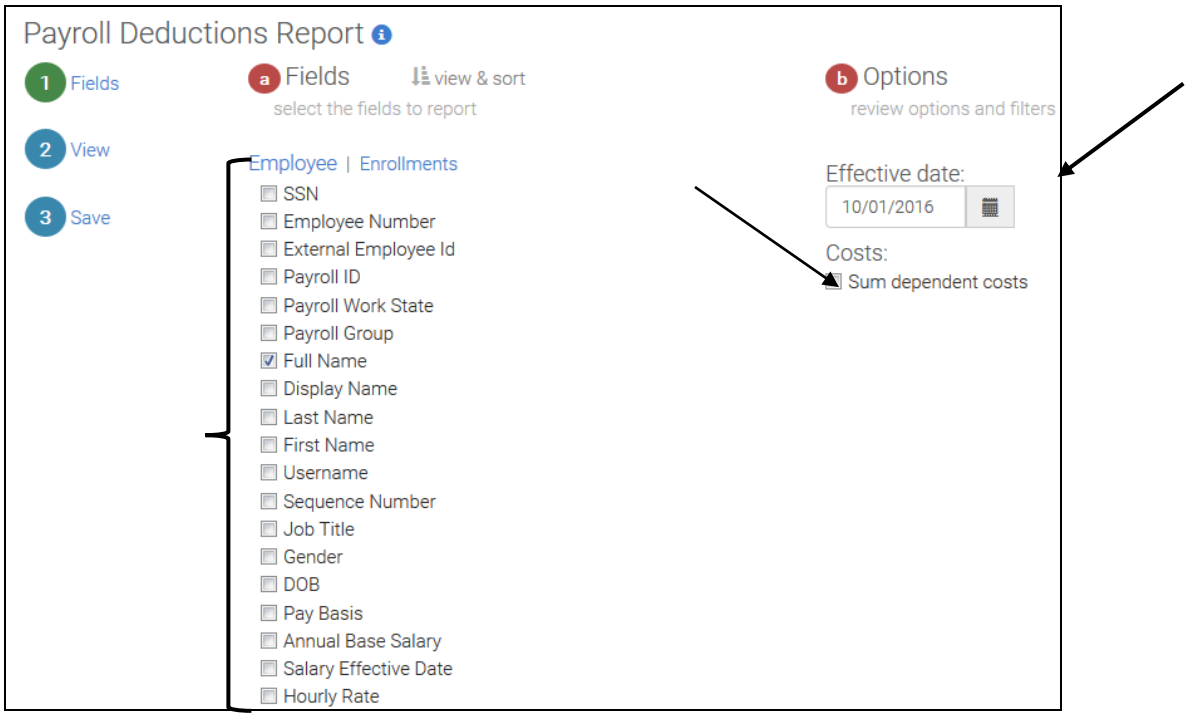
How to Run a Payroll Deduction Report:

1. From your "Home" page, select "Reports".

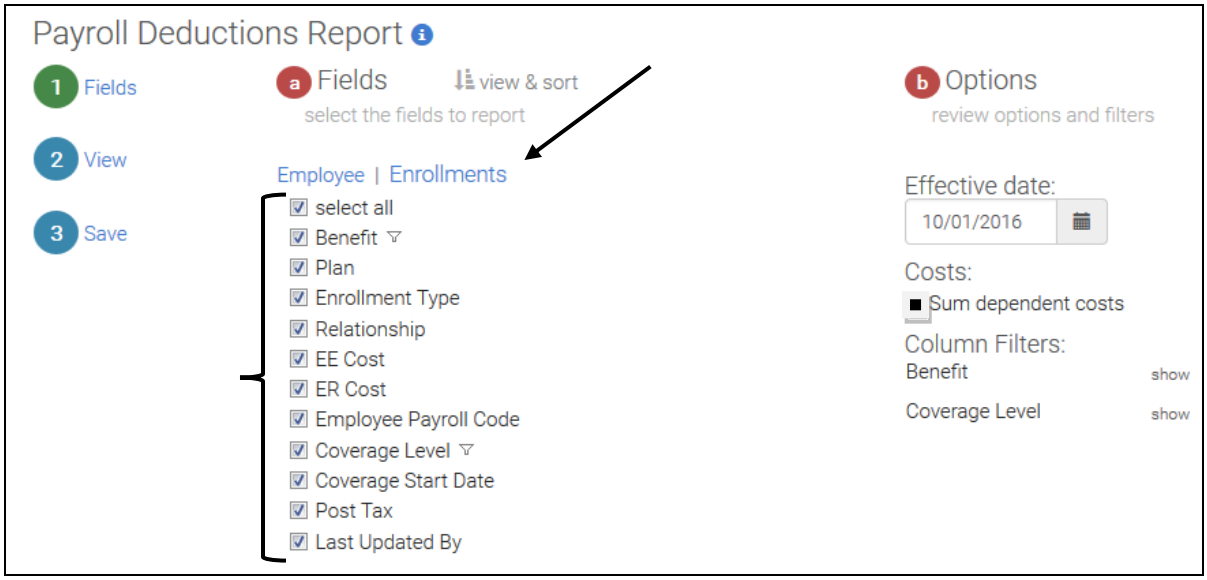


2. Select "Payroll Deductions Report" under "New Reports".

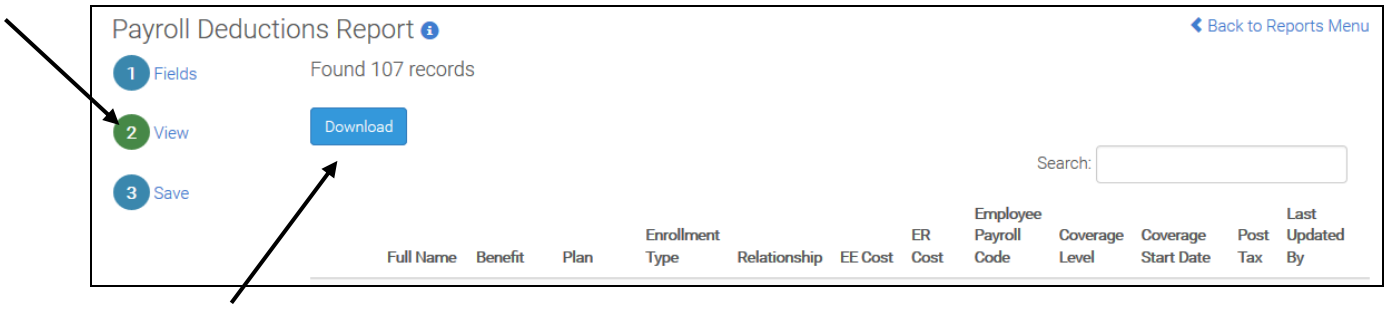
3. Select which fields you would like to see on the report, enter an “Effective Date”, and select “Sum dependent costs”.



4. Select the “Enrollments” link and select which fields you would like to see on the report.

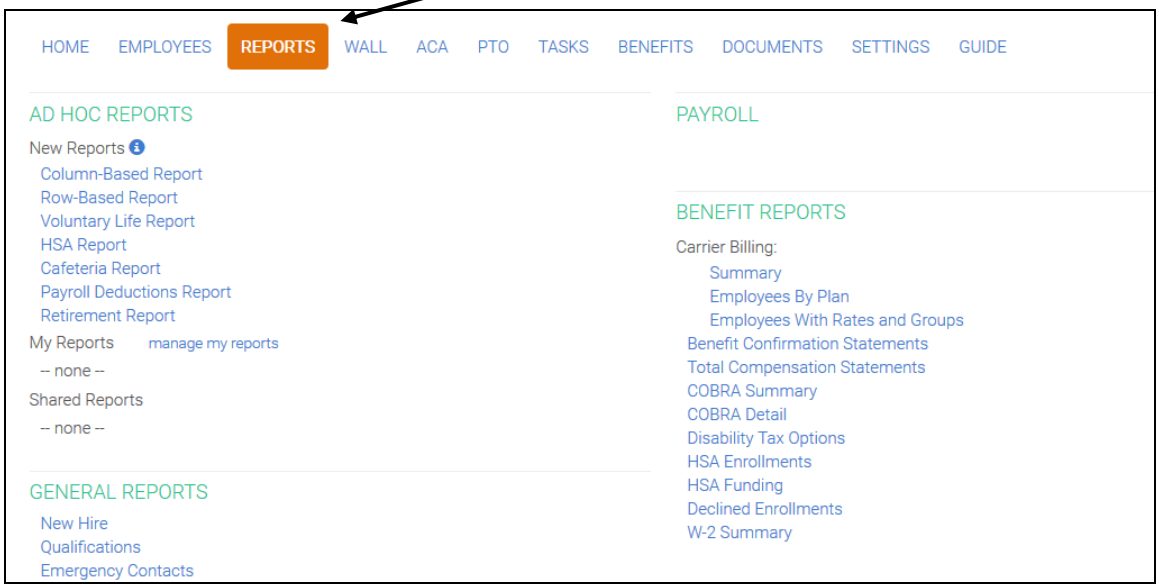


5. Select “View” on the left side to generate your report. Press “Download” and the report will generate as an excel file.



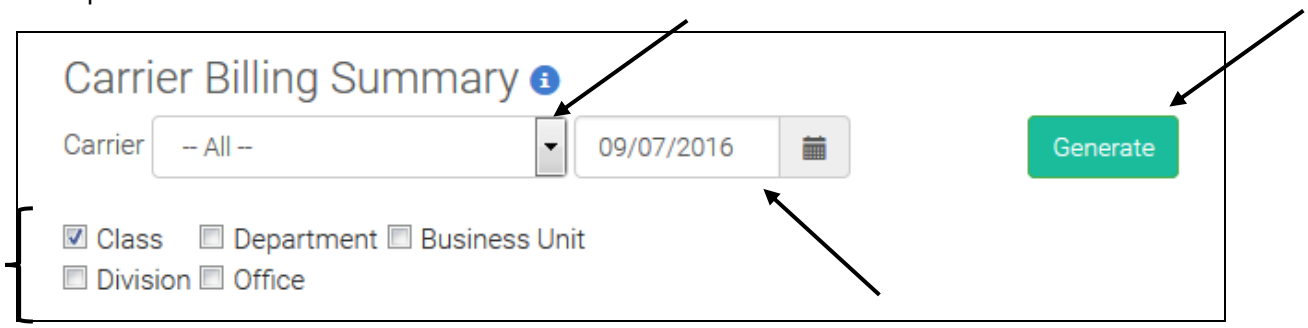
How to Run a Premium Report by Carrier for a Bill Audit:

1. From your "Home" page, select "Reports".

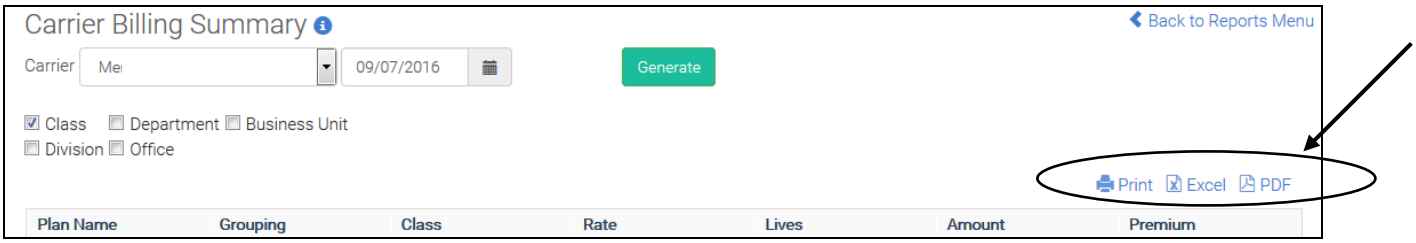


2. Select "Summary" under "Benefit Reports – Carrier Billing".

3. Select the "Carrier", enter a date, set your classification parameters (we suggest at least selecting "Class") and press "Generate".

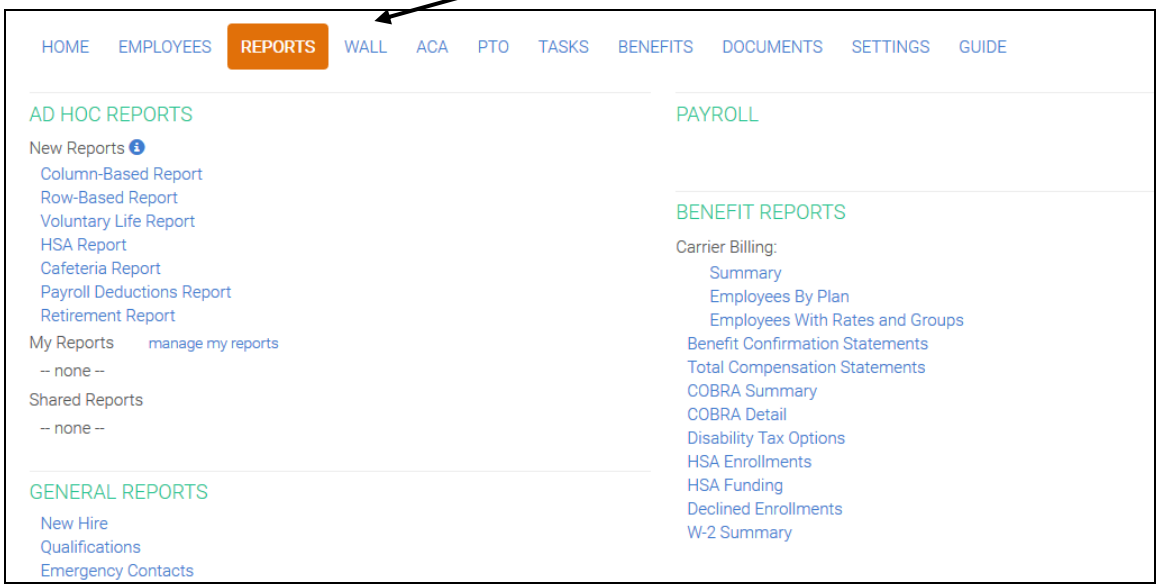


4. The report will appear on the next screen. You can “Print” or download as an “Excel” or “PDF”.

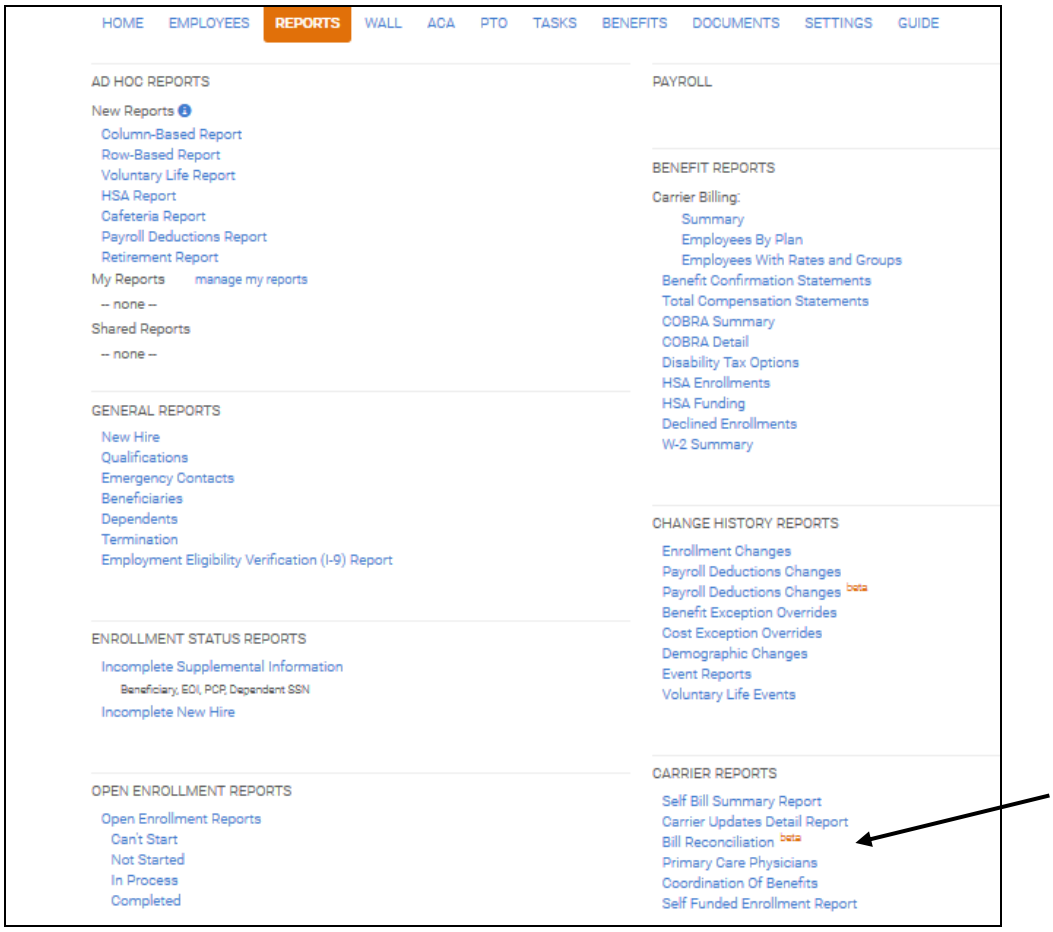


How to Run a Bill Reconciliation Report:

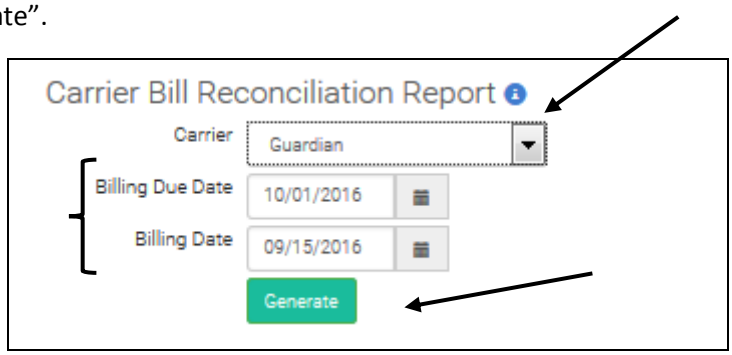
1. From your "Home" page, select "Reports".



2. Select "Bill Reconciliation" under "Carrier Reports".

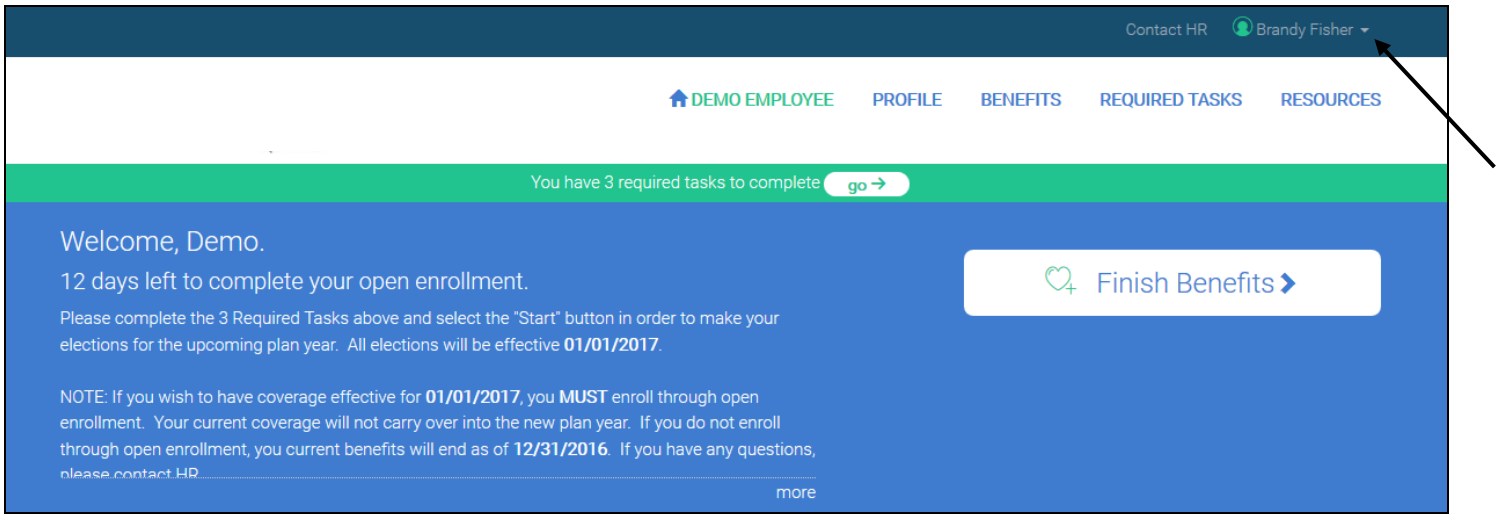


3. Select the “Carrier”, enter the “Billing Due Date”, enter the date the bill was generated- “Billing Date”, and press “Generate”.



How to change the portal to Spanish

1. Once you are registered and logged in, select the arrow next to your name in the upper left hand corner.



2. From the drop down menu, select "Español". The portal will then convert to Spanish.