



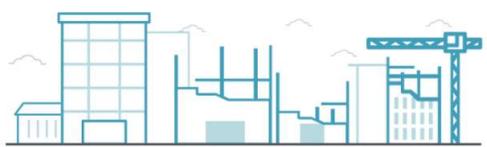
employee NAVIGATOR

How to connect a client to the Cafeteria EN-Exchange and Exclude Plans

Step 1: From the client's home page, select Cafeteria under Admin Only:

Q

Welcome back, Emily!



Things to do	Completed
Complete employees missing HR required fields	965
Review invalid address	601

Quick Links Customize

Add Employee	Ad-hoc Reports	Org Chart
Import Employees and Enrollment	View/Manage Saved Reports	Add Document
Add Company Note	New Hire Reports	Login Status Report
Add Employee Note	Termination Report	

Admin Only i

Enrollment Editor	COBRA Participants	Brokers
Review Insurability Requests	Carrier	COBRA
Benefits	Cafeteria	Administration Services

Step 2: Select 'add a service,' then from the drop down find the vendor you are connecting to, then click 'add.'

Note: You DO NOT have to use subscriber groups. It is best practice to select 'All Employees'

Step 3: There will be a screen displaying company information. Complete any fields that have missing data.

Step 4: The next page will display brokers, premier users and HR users for the company. Select a contact that you want for your primary subscription contact.

Step 5: Verify the benefits that will be sent for this client. Any of the benefits NOT SELECTED will send on the file. If your vendor administers your client's FSA and Dependent Care but not their Health Savings Account (HSA) then you would want to exclude the HSA.

Click on the 3 dots on the right and select 'exclude benefits/plans.' Select the box next to benefit if the benefit **should not** send on the file. Leave deselected if the benefit *should* send on the file.

Cafeteria Data Exchanges

- Broker
- Carrier
- Cafeteria
- COBRA
- Administrative Services
- Quoting Engines alpha
- Integrated Partners alpha
- Ad Hoc Audits alpha

This feature allows for the automated push of employee and dependent enrollment to select carriers without using traditional carrier file feeds.

It is *not* visible to HR users.

[add a service +](#)

Product Name	Group	Identifier	EN Identifier	Status
Partner Test Vendor: Cafeteria		4578	04adecab-1a3c-4a50-a4c5-8b116e1a6497	New

- End participation
- Excluded Benefits/Plans
- Edit contact info

Important Note: If you exclude by 'plan' you will need to do so each plan year, excluded 'plans' DO NOT stay excluded upon renewing the plan. **It's recommended that you exclude by 'benefits.'**