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An expert on your side

CoSource WebEnroll, powered by i-enroller

Our Corporate Partnerships Provide Access To An Exclusive Network Of HR, Benefits And Technology Advisors.

We have a strategic alliance with HR Technology Advisors (HRT), a national, independent technology consultant focused entirely in the human resources & employee benefits technology marketplace.



Through our partnership with HRT, we can pass along better pricing on products and access to a shared service center that ensures better service and superior implementation. In addition, we are now able to bundle HRT's implementation expertise with market leading solutions that are easy to use, affordable, integrated, scalable, and can help you achieve your most critical HR and employee benefits management objectives.

i-enroller Leverages the Strengths of the Internet and Interactive PDF Technology

i-enroller delivers an automated enrollment solution that's ready in hours and can be used by all enrollees, not just the Internet connected. The solution's document-centric approach is readily received by enrollees allowing you to efficiently manage enrollment while enhancing the enrollee experience. Integrated web, PDF and paper processes allow you to deliver an enrollment solution based on each individual's access to, and comfort with, technology.



An i-enroller case is defined as a group of employees with the same benefits, contribution, and payroll frequency. Once a case is created, it is easy to copy and modify for another group within the same employer (think Hourly and Salaried or different locations). i-enroller provides both open enrollment and new hire enrollment from the same dashboard. The New Hire case may be (but does not have to be) different from the Open Enrollment case, as New Hires may have different benefit offerings. The New Hire enrollment is created initially as a replica of the Open Enrollment case, and may be modified as needed.



Getting started:

- Collect client plan offering information, rates, and employee contributions that you want to include in the enrollment.
- Obtain copy of client logo (jpg format) for the enrollment form (you can usually copy from their website).
- Collect or create any plan materials or documents you choose to include as part of enrollment communications to the employee.
- Get census information Excel file from the employer (not required, but very helpful)

Create the Enrollment form:

- Click the case Setup wizard from your Broker home page and begin.
- Enter the client information, enrollment dates, and upload the client logo.
- Determine the plans to be offered in the enrollment by checking the coverages.
- Enter the plan information for each plan offered – descriptions, rates, contributions, and plan criteria.
- Determine appropriate provisions for offering – Payroll Deductions, Waiver rights, etc.
- Submit the form to create web enrollment and corresponding paper forms.
- Review the forms with the client.

Prepare to Enroll:

- Upload any plan materials you would like to include in the enrollment – plan documents, claim forms, EOI forms, and comparison of benefits. These will be available to the employee at all times, both during and after enrollment.
- Upload the employee census into the case using the census upload wizard. Uploading census will pre-load much of the employee information. The enrollment can also be set up with a generic login and password, but this method required employees to enter all demographic information.
- Employees can also be added one at a time to make new hire processing easy.