

“

How prepared do you feel
you generally are for Open
Enrollment?

”



Learnsynx
Mastering Knowledge, Together.

Spring Into Action

*Navigating Open Enrollment with **THEbenefitsHUB***



*The primary purpose of this webinar series is to educate and inform, and **allsynx** does not guarantee the accuracy or sufficiency of the information provided. This webinar does not constitute professional advice, is not legal interpretation, is not an endorsement, and is not a statement of **allsynx**'s policies. Further, the views, information, and opinions expressed by any guests during this webinar are solely those of the individuals involved and do not necessarily represent those of **allsynx**.*



A Few Reminders...



Questions



Chat



Handout & Recordings



Your Feedback

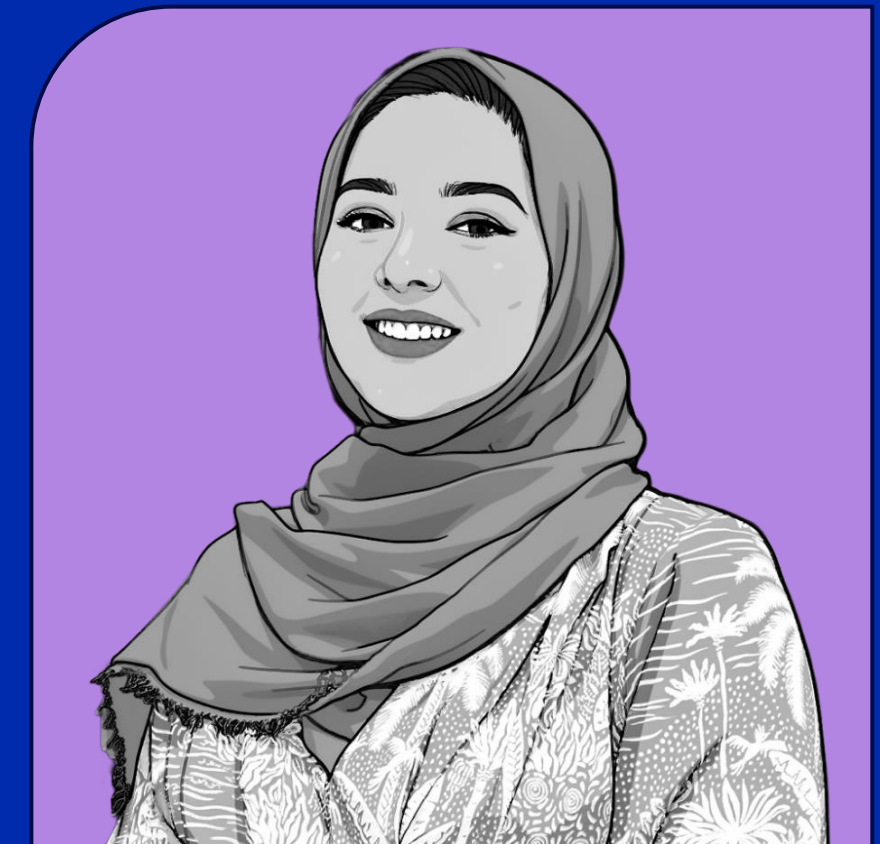


Today's Presenters:



Liz Gerlach

Training Supervisor



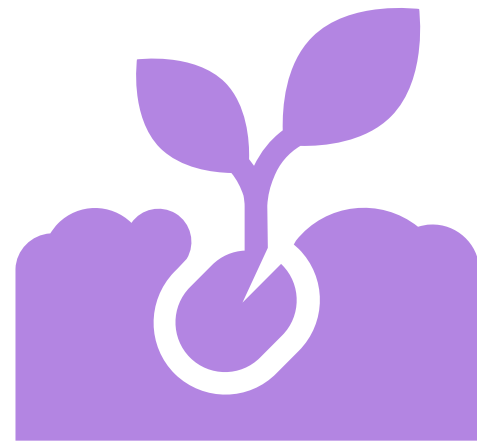
Halima Khan

Talent Development Specialist



Objectives

By the end of today's webinar...



Grow With Your Tools

Identify key features of tools available in **THEbenefitsHUB** to help enhance efficiency.



Plant The Seeds

Learn best practices for preparing your team for a seamless experience.

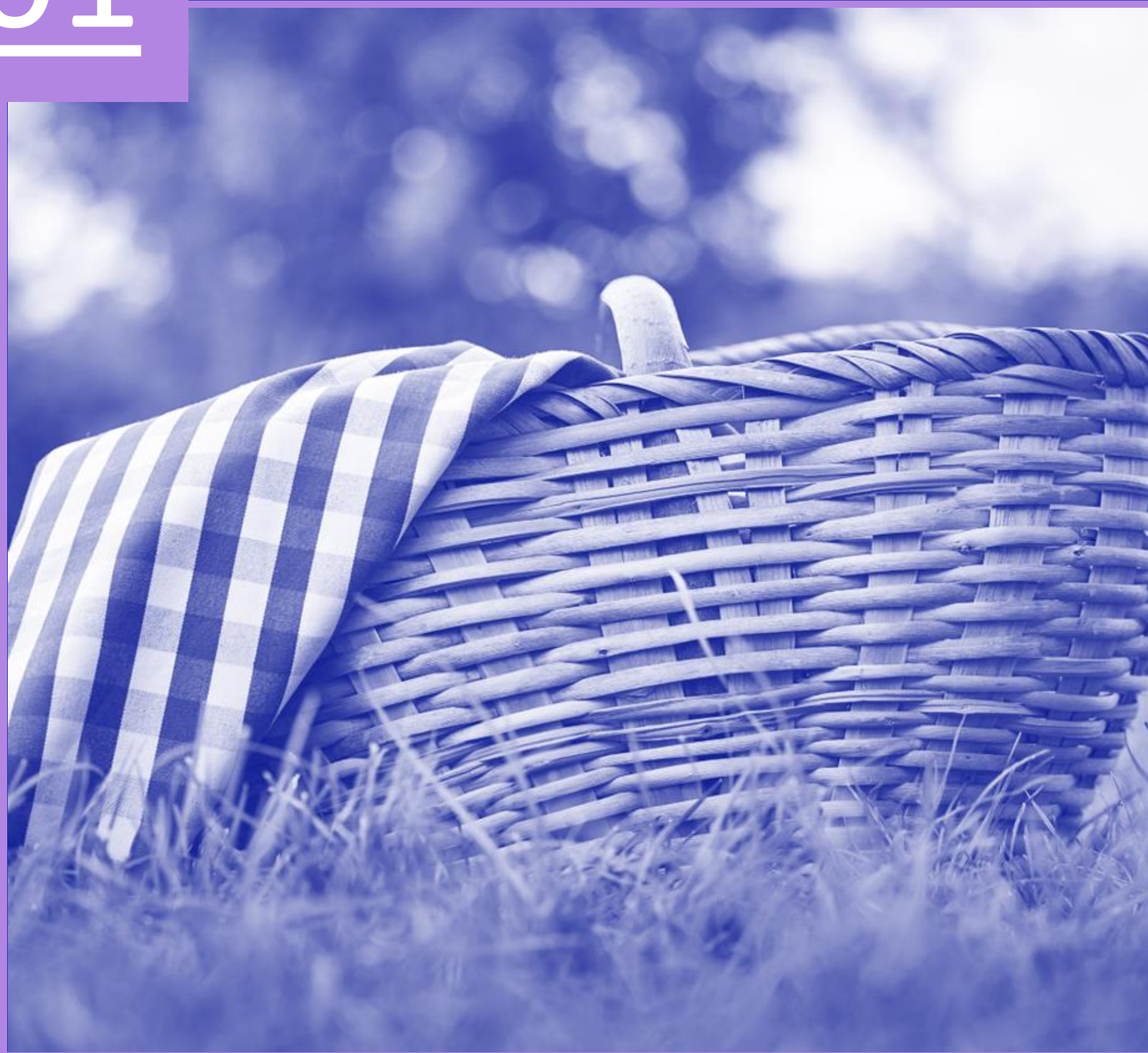


Freshen Your Approach

Assess current Open Enrollment practices to identify any areas of improvement.



01



New for 2026!

TRS Required
Dependent SSN's



Employee: Benny HUBster ▾ SSN: xxx-xx-0020 EE Enrollment Status: Incomplete EEID: 1902344 Show More ▾

Dependents Missing SSNs

You have enrolled in coverage in a benefit that requires dependent social security numbers. In order to proceed, please provide the missing social security numbers or remove those dependents from the election.

Medical Election

ActiveCare HD

Provided By TRS
Effective on 6/1/2026

\$1713.00 / monthly

Cost is deducted on a pre-tax basis

- You [Employee]
- Taylor HUBster [Spouse]
SSN/ITIN Required
- Brandi HUBster [Child]
SSN/ITIN Required
- Trent HUBster [Child]
Provide SSN/ITIN if Available



Missing SSN

Taylor HUBster

Enter SSN/ITIN

000-00-0000

Remove from election

Brandi HUBster

Enter SSN/ITIN

000-00-0000

Remove from election



Infant SSN

There is a 366 day grace period for Infants SSN. Please provide the SSN if available.

Trent HUBster

Enter SSN/ITIN

000-00-0000

I will provide this information at another time.



Save

Appears on:
Benefits Requiring Member SSN's
Employees Missing Dependent SSN's

Medical Election Section:
Shows Current Elected Plan and Rate

Missing SSN Section:
Enrollees Who Need Their SSN Now

Infant SSN Section:
Enrollees Who Need Their SSN Later



01

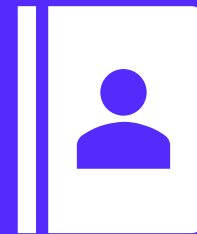


Tools Overview



Administration Dashboard

- IMNS Dashboard
- Login Statistics
- Manage Payroll Codes
- Benefit Summary
- Company Summary
- Export Summary
- FTP File Access



Employee Administration

- Profile
- History File
- Journal
- Employee Eligibility Report
- Evidence of Insurability
- Qualifying Events



Company Reporting

- Login Statistics
- Monthly Billing
- New Hire Email
- Plan Election Comparison
- Employee Census
- Plan Enrollment



Company Communication

- Company Acknowledgments
- E-mail Broadcast
- Forms Library
- Manage Product Wording
- New Hire Email



02



IMNS Dashboard



Logout, alice.admin.

ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

- Administration Dashboard ^
- Employee Administration v
- Company Reporting v
- Company Communication v
- LEARNSynx v

Administrative Tools ^

- Acknowledgment Settings
- EDI/File Viewer
- IMNS Dashboard ←
- Login Statistics
- Qualifying Life Event Settings

Summaries v

- Profile
- Security Settings
- FTP File Access
- History File



INELIGIBLE MEMBER NOTIFICATION SYSTEM

Please select one or more notifications and divisions you would like to run the IMNS report for, and then click the "Run" button below to review the report.

After your initial report is finished, you may alter your selections and click the "Refresh" button to update the report.

You may convert your report to CSV/Excel by clicking the "Export All To CSV" button.

Select Notifications:

- 18 Month COBRA Notification
- Basic Life Reduction Notification
- Dependent Age Eligibility
- Duplicate Social Security Numbers Within An Employee's Record
- Duplicate SSN
- Elections In More Than One Medical Option
- Employees Missing Addresses
- Employees Missing Beneficiaries
- Employees Missing Pay Frequency
- Employees Missing Payroll ID Number
- Inactive Dependents with Active Elections
- Inactive Employees With Future Elections
- Incomplete New Hire Window
- Invalid Character Data
- Invalid Tax Elections
- Married Employees
- Missing PCPs
- New Hires with Actively at Work Election
- Newly Added Dependents with No Benefits
- OneAmerica EOI Status
- OneAmerica ESOI Cancellations - Next 30 Days
- Qualified Medical Support Order - Missing Benefits
- Zip Code Eligibility

Select Divisions:

Available



Selected





INELIGIBLE MEMBER NOTIFICATION SYSTEM

Please select one or more notifications and divisions you would like to run the IMNS report for, and then click the "Run" button below to review the report. After your initial report is finished, you may alter your selections and click the "Refresh" button to update the report. You may convert your report to CSV/Excel by clicking the "Export All To CSV" button.

- Select Notifications:**
- 18 Month COBRA Notification
 - Basic Life Reduction Notification
 - Dependent Age Eligibility
 - Duplicate Social Security Numbers Within An Employee's Record
 - Duplicate SSN
 - Elections In More Than One Medical Option
 - Employees Missing Addresses
 - Employees Missing Beneficiaries
 - Employees Missing Pay Frequency
 - Employees Missing Payroll ID Number
 - Inactive Dependents with Active Elections
 - Inactive Employees With Future Elections
 - Incomplete New Hire Window
 - Invalid Character Data
 - Invalid Tax Elections
 - Married Employees
 - Missing PCPs
 - New Hires with Actively at Work Election
 - Newly Added Dependents with No Benefits
 - OneAmerica EOI Status
 - OneAmerica ESOI Cancellations - Next 30 Days
 - Qualified Medical Support Order - Missing Benefits
 - Zip Code Eligibility

Select Divisions:

Available		Selected
	<input type="button" value=" >"/> <input type="button" value=" >>"/> <input type="button" value=" <"/> <input type="button" value=" <<"/>	Austin Office Dallas Office

Refresh

Export All To CSV

Inactive Dependents with Active Elections

Inactive dependents with Active Elections



	EmployeeID	Division	Employee	Employee Marital Status	Dependent	Relationship	Benefit	Effective Date	Termination Date
Edit	2443502	Austin Office	HUBster, Peter	Divorced	HUBster, Patricia	Spouse	Medical Declination	09/01/2025	12/31/2030

1 Records Returned

Back



03



FTP File Access













Logout, alice.admin.


ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

-  Administration Dashboard 
-  Employee Administration 
-  Company Reporting 
-  Company Communication 
-  LEARNsynx 

Administrative Tools 

Summaries 

Profile

Security Settings

FTP File Access

History File





Logout, alice.admin.

ADMINISTRATION MENU > FTP FILE ACCESS

NEED HELP? | GIVE FEEDBACK

ADMINISTRATOR DASHBOARD

FTP File Access

This file transfer protocol (FTP) feature will allow you, the user, to deliver, accept, and view your data easily and securely.

Home

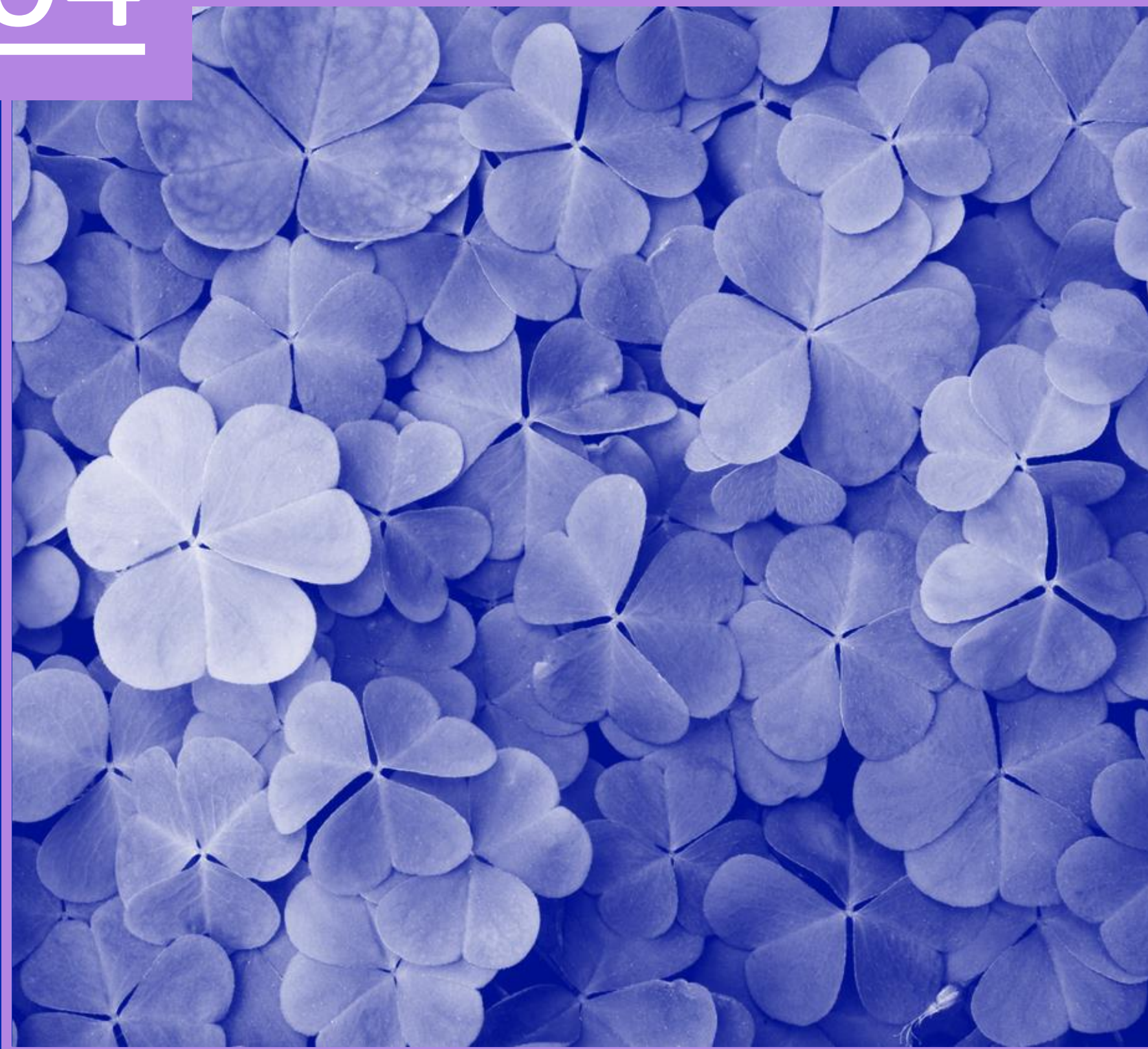


Name ▲	Date
American Health Plan	4/1/2026 12:27 AM
autoimport	3/25/2021 3:52 PM
Data Continuation	8/9/2019 12:17 PM
Demographics	8/9/2019 12:17 PM
Global Insurance	11/5/2024 4:30 PM
Payroll	8/9/2019 12:18 PM
Reports	4/3/2025 8:43 AM
FTPTest.docx 13 KB	4/3/2025 8:42 AM

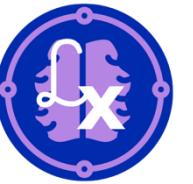
7 directories and 1 file found.



04



Export Summary



Logout, alice.admin.

ADMINISTRATION MENU


NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE




Administration
Dashboard

^



Employee
Administration

v




Company
Reporting

v



Company
Communication

v



LEARNsynx

v

Administrative Tools v

Summaries ^

Benefit Summary

Company Summary

Export Summary



Profile

Security Settings

FTP File Access

History File



EXPORT SUMMARY

This page displays all current, actively delivering exports as well as future exports that are finalized for delivery. For information on past exports, please contact your Account Representative and a report will be made available.

Export Name	First Production File	Last Scheduled Date	Schedule Name	Run Frequency
American Health Plans - Dental - Ongoing [Training]	12/25/2024	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday
American Health Plans - Vision - Ongoing [Training]	08/21/2019	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday

[Back](#)



Logout, alice.admin.

AMERICAN HEALTH PLANS - DENTAL - ONGOING [TRAINING]



File History

Select Date Span: to

Filename	Filesize	Export Type	File Type	Contains	Executed By	Date Executed	Delivery Status
PlanEnrollment_58505_2026-04-01-00-20-17.txt	15483	Production	Full File	Live	Scheduler	04/01/2026 00:20:17	Results: 04/01/2026 00:27:05
PlanEnrollment_58505_2026-03-18-00-13-15.txt	14290	Production	Full File	Live	Scheduler	03/18/2026 00:13:16	Results: 03/18/2026 00:14:05
PlanEnrollment_58505_2026-03-04-00-13-36.txt	14290	Production	Full File	Live	Scheduler	03/04/2026 00:13:36	Results: 03/04/2026 00:15:53



Back



PlanEnrollment_58505_2026-04-01

File Edit View

```

"GroupName","EmployeeLastName","EmployeeFirstName","EmployeeSSN","EmployeePayrollFrequency","EmployeeDOH","EmployeeStatus","EmployeeHoursWorked","Benefit","PlanName","Tier","CoveredMemberRelationship","CoveredMemberLastName","CoveredMemberFirstName","CoveredMemberDOB","CoveredMemberSSN","EffectiveDate","RequestedCoverage","ApprovedCoverage","ApprovedERCost","ApprovedEECost","Salary","HomePhone","WorkPhone","LoginStatus","Gender","Address 1","Address 2","City","State","Zipcode","EmployeeDOB","Email","Alternate Email","MemberType1","DivisionName","ClassName","Existing UDF","Replacing UDF","DateTermination","CellPhone","Is Dependent Disabled","EE Marital Status","Medicare Medicaid","Salary Multiple",
"Training - BrightPassage","Admin","Alice","100000026","26","08/19/2025","Active","40","Dental","Dental Plan","Employee
[E]","Employee","Admin","Alice","01/01/1975","100000026","09/01/2025","0","0","5","5","45000","8666341057","8666341057","Incomplete","Female","2185 N Glenville Drive","","Richardson","TX","75082","01/01/1975","alice@brightpassage.com","","Employee","Dallas Office","Class 1","","","","","Single","","0"
"Training - BrightPassage","Ball","Alice","100000029","12","10/20/2015","Active","40","Dental","Dental Plan","Employee
[E]","Employee","Ball","Alice","01/01/1979","100000029","01/01/2025","0","0","5","5","40000","8666341057","8666341057","Complete","Female","2185 North Glenville","","Richardson","TX","75082","01/01/1979","learn@allsynx.com","","Employee","Austin Office","Class 1","","","","","Single","","0"
"Training - BrightPassage","Christie","Agatha","100000030","12","10/20/2017","Active","40","Dental","Dental Plan","Family
[F]","Employee","Christie","Agatha","01/01/1975","100000030","01/01/2025","0","0","5","15","40000","8666341057","8666341057","Complete","Female","2185 North Glenville","","Richardson","TX","75082","01/01/1975","learn@allsynx.com","","Employee","Austin Office","Class 1","","","","","Married","","0"
"Training - BrightPassage","Christie","Agatha","100000030","12","10/20/2017","Active","40","Dental","Dental Plan","Family
[F]","Spouse","Christie","Archibald","01/01/1979","000000031","01/01/2025","0","0","0","0","40000","8666341057","8666341057","Complete","Male","2185 North Glenville","","Richardson","TX","75082","01/01/1975","learn@allsynx.com","","Spouse","Austin Office","Class 1","","","","","No","","0"
"Training - BrightPassage","Christie","Agatha","100000030","12","10/20/2017","Active","40","Dental","Dental Plan","Family
[F]","Child","Hicks","Rosalind","01/01/2015","000000032","01/01/2025","0","0","0","0","40000","8666341057","8666341057","Complete","Female","2185 North Glenville","","Richardson","TX","75082","01/01/1975","learn@allsynx.com","","Dependent (Children)","Austin Office","Class 1","","","","","No","","0"
"Training - BrightPassage","Copernicus","Nicolaus","100000033","12","10/20/2009","Active","40","Dental","Dental Plan","Employee
[E]","Employee","Copernicus","Nicolaus","01/01/1973","100000033","01/01/2025","0","0","5","5","40000","8666341057","8666341057","Complete","Male","2185 North Glenville","","Richardson","TX","75082","01/01/1973","learn@allsynx.com","","Employee","Austin Office","Class 1","","","","","Single","","0"
"Training - BrightPassage","HUBster","Adam","100000088","26","07/02/2025","Active","40","Dental","Dental Plan","Employee
[E]","Employee","HUBster","Adam","12/30/1990","100000088","01/01/2026","0","0","5","5","50000","8666341057","8666341057","Incomplete","Male","2175 N. Glenville Dr","","Richardson","TX","75082","12/30/1990","learn@allsynx.com","learn@allsynx.com","Employee","Dallas Office","Class 1","","","","","Single","","0"
"Training - BrightPassage","Hubster","Benny","100000089","26","01/05/2026","Active","40","Dental","Dental Plan","Family
[F]","Employee","Hubster","Benny","01/01/1990","100000089","01/01/2025","0","0","5","15","50000","8666341057","8666341057","Complete","Male","2175 N. Glenville Dr","","Richardson","TX","75082","01/01/1990","learn@allsynx.com","learn@allsynx.com","Employee","Dallas Office","Class 1","","","","","Married","","0"
"Training - BrightPassage","Hubster","Benny","100000089","26","01/05/2026","Active","40","Dental","Dental Plan","Family
[F]","Spouse","Hubster","Taylor","01/01/1991","","01/01/2025","0","0","0","0","50000","8666341057","8666341057","Complete","Female","2175 N. Glenville Dr","","Richardson","TX","75082","01/01/1990","learn@allsynx.com","learn@allsynx.com","Spouse","Dallas Office","Class 1","","","","","No","","0"
"Training - BrightPassage","Hubster","Benny","100000089","26","01/05/2026","Active","40","Dental","Dental Plan","Family
[F]","Child","Hubster","Brandi","01/01/2005","","01/01/2025","0","0","0","0","50000","8666341057","8666341057","Complete","Female","2175 N. Glenville Dr","","Richardson","TX","75082","01/01/1990","learn@allsynx.com","learn@allsynx.com","Dependent (Children)","Dallas Office","Class 1","","","","","No","","0"
"Training - BrightPassage","HUBster","Felicity","100000009","12","07/23/2020","Active","40","Dental","Dental Plan","Family
[F]","Employee","HUBster","Felicity","01/01/1975","100000009","09/01/2025","0","0","5","15","60000","8666341057","8666341057","Incomplete","Female","2185 North Glenville","","Richardson","TX","75082","01/01/1975","learn@allsynx.com","","Employee","Austin Office","Class 1","","","","","Married","","0"
"Training - BrightPassage","HUBster","Felicity","100000009","12","07/23/2020","Active","40","Dental","Dental Plan","Family
[F]","Spouse","HUBster","Francis","01/01/1971","000000010","09/01/2025","0","0","0","0","60000","8666341057","8666341057","Incomplete","Male","2185 North Glenville","","Richardson","TX","75082","01/01/1975","learn@allsynx.com","","Spouse","Austin Office","Class 1","","","","","No","","0"
"Training - BrightPassage","HUBster","Felicity","100000009","12","07/23/2020","Active","40","Dental","Dental Plan","Family
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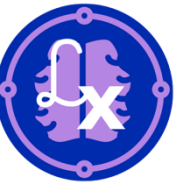
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05



Evidence of Insurability



Logout, alice.admin.

ADMINISTRATION MENU


NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE



Administration Dashboard

▼



Employee Administration

▲




Company Reporting

▼



Company Communication

▼



LEARNsynx

▼



- Add Employee
- Employee Search
- Evidence of Insurability [6 pending]
- Evidence of Insurability Reminders
- Manage Test Employees
- New Hire Email Reminders
- Print Forms
- Qualifying Life Event Requests [0 open]



EMPLOYEE ADMINISTRATION

Evidence of Insurability

Below is a list of individuals who have exceeded the maximum approved coverage for the plan they have elected. Please provide the date that evidence of insurability documents were received from an individual, the date that coverage becomes effective, and the coverage amount that was approved.

To deny any pending coverage, enter the approved amount, check the corresponding denial checkbox and provide denial reason if applicable.

To send email reminders for employees to submit Evidence of Insurability forms, [click here](#).

Show plan type

Date Received	Date Effective	Employee Name	Plan Type	Covered Member	Effective Date	Current Coverage	Elected Coverage	EOI Integration Status	Approved Coverage	Deny Unapproved Coverage/Reason
<input type="text"/>	<input type="text"/>	Frost, Jack	Employee Life	self	9/1/2025	\$0.00	\$280,000.00		<input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="text"/>	<input type="text"/>	Frost, Jack	Child(ren) Life	Frost, Elsa [child]	9/1/2025	\$5,000.00	\$10,000.00		<input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="text"/>	<input type="text"/>		"	Frost, Ivy [child]	9/1/2025	\$5,000.00	\$10,000.00		<input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="text"/>	<input type="text"/>	HUBster, Sandy	Employee Life	self	1/1/2026	\$230,000.00	\$300,000.00		<input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="text"/>	<input type="text"/>	Test, Nathan	Long Term Disability	self	4/1/2026	\$0.00	\$1,000.00		<input type="text"/>	<input type="checkbox"/> <input type="text"/>
<input type="text"/>	<input type="text"/>	Test, Nathan	Employee Life	self	4/1/2026	\$200,000.00	\$210,000.00		<input type="text"/>	<input type="checkbox"/> <input type="text"/>

6 returned evidence of insurability records



Logout, alice.admin.

ADMINISTRATION MENU

NEED HELP? | GIVE FEEDBACK

ADMINISTRATION MENU - TRAINING - BRIGHTPASSAGE

- Administration Dashboard
- Employee Administration
- Company Reporting
- Company Communication
- LEARNSynx



- Add Employee
- Employee Search
- Evidence of Insurability [6 pending]
- Evidence of Insurability Reminders
- Manage Test Employees
- New Hire Email Reminders
- Print Forms
- Qualifying Life Event Requests [0 open]



EMPLOYEE ADMINISTRATION

Email Evidence of Insurability Reminders

Below is a list of individuals who have exceeded the maximum approved coverage for the plan they have elected. To send an email reminder for those employees to provide their required Evidence of Insurability forms, select the employees you wish to receive an email, enter a subject and a body and click the send button.

NOTE: Employees without a valid e-mail address will NOT be listed below. The plan design's Evidence of Insurability form will be attached [if applicable].

Show plan type

Check All	Employee Name	Plan Type	Covered Member	Effective Date	Date Elected	Current Coverage	Elected Coverage	EOI Form
<input checked="" type="checkbox"/>	HUBster, Sandy	Employee Life [3326911]	self	1/1/2026	12/2/2025	\$230,000.00	\$300,000.00	Download

1 returned evidence of insurability record

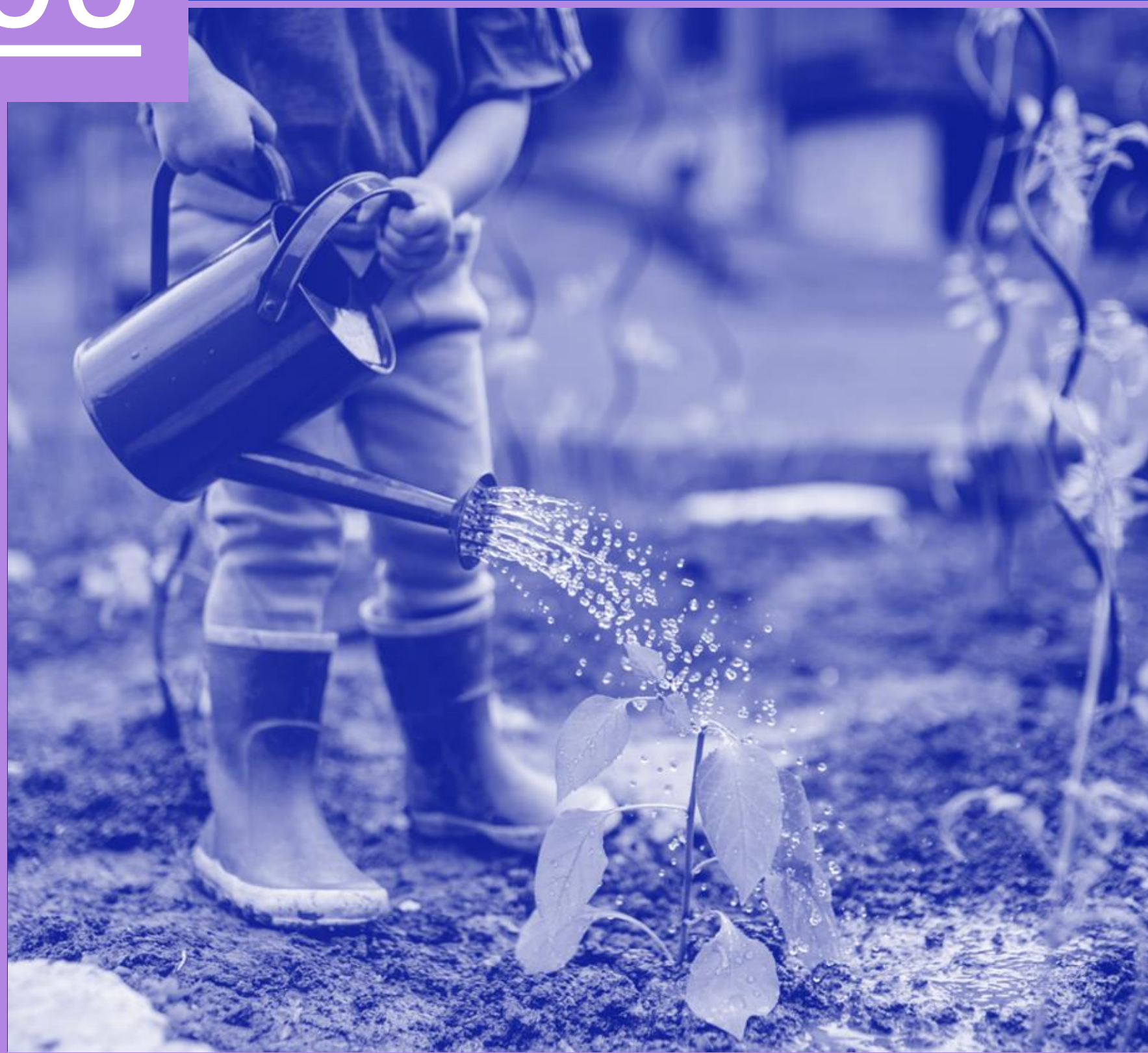


Email Subject

Email Body



06



History File



Logout, alice.admin.

Employee: Peter HUBster ▾




SSN: xxx-xx-0005

EE Enrollment Status: Incomplete

Payroll ID:

Show More ▾

EMPLOYEE ADMINISTRATION - HUBSTER, PETER

 <p>Employee Information</p> <p>^</p>	 <p>Dependent Information</p> <p>▾</p>	 <p>Benefit Plan Information</p> <p>▾</p>
--	---	--

Profile

Emergency

Directory

New Hire Email

History File

Journal

Security Settings





Employee: Peter HUBster ▾ SSN: xxx-xx-0005 EE Enrollment Status: Incomplete Payroll ID: Show More ▾

Employee History

Select Date Range



04/09/2025

04/09/2026

Search

Results

Show 10 ▾

Activity By	Activity	
Alice Admin "alice.admin." Company Administrator	HUBster, Peter - Employee edited by company administrator "alice.admin." Marital Date edited from 4/5/2026 to 2/1/2026	04/06/2026, 04:12 PM CDT IP 10.0.1.43
	E-mail Notification Message Sent By the Company Administrator	04/06/2026, 04:10 PM CDT
Alice Admin "alice.admin." Company Administrator	HUBster, Peter - Employee edited by company administrator "alice.admin." Marital Status edited from Married to Divorced Marital Date edited from None to 4/5/2026	04/06/2026, 04:10 PM CDT IP 10.0.1.125
Alice Admin "alice.admin." Company Administrator	HUBster, Peter - Employee Plan Enrollment Information edited by company administrator "alice.admin." HUBster, Patricia - Relationship was changed from Domestic Partner to Spouse	04/06/2026, 04:10 PM CDT IP 192.168.10.131
Elizabeth Gerlach "egerlach" System Administrator	HUBster, Peter - Employee edited by system administrator "egerlach" Work Phone edited from None to 866-634-1057	01/27/2026, 02:57 PM CST IP 10.0.1.7
Elizabeth Gerlach "egerlach" System Administrator	HUBster, Peter - Personal Photo Information was changed by system administrator "egerlach" HUBster, Peter - Personal Description was changed from to	01/27/2026, 02:54 PM CST IP 192.168.10.131
Elizabeth Gerlach "egerlach" System Administrator	HUBster, Peter - Employee edited by system administrator "egerlach" Home Phone edited from None to 866-634-1057 Cell Phone edited from None to 866-634-1057 Email edited from None to learn@allsynx.com	01/27/2026, 02:54 PM CST IP 10.0.1.7
Alice Admin "alice,admin" Company Administrator	HUBster, Peter - Employee edited by company administrator "alice,admin" Social Security Number edited from 000000005 to 100000005	10/31/2025, 09:28 AM CDT IP 10.0.1.17



07



Journal

Welcome!

2026
Feature

Tools
Overview

IMNS
Dashboard

FTP
Access

Export
Summary

EOI

History
File

Journal

Scenario

Best
Practices

Assessment



Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > **EMPLOYEE MENU**

NEED HELP? | GIVE FEEDBACK

Employee: Peter HUBster ▾




SSN: xxx-xx-0005

EE Enrollment Status: Incomplete

Payroll ID:

Show More ▾

EMPLOYEE ADMINISTRATION - HUBSTER, PETER

 <p>Employee Information</p> <p>^</p>	 <p>Dependent Information</p> <p>▾</p>	 <p>Benefit Plan Information</p> <p>▾</p>
--	---	--

Profile

Emergency

Directory

New Hire Email

History File

Journal

Security Settings





Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU >

NEED HELP? | GIVE FEEDBACK

Employee: Peter HUBster

SSN: xxx-xx-0005

EE Enrollment Status: Incomplete

Payroll ID:

Show More

JOURNAL INFORMATION

Below is the list of journal entries. To view an entry, click the journal date or subject.

Please Note:

When inputting notes in the Journal Information of an employee, anything related to salary will be shown to all administrators whether they have limited or non-limited access. Enter salary related information at the employers' discretion.



Add Journal Entry



Journal Date	Subject	Category	Created By	File Uploaded
8/19/2025 @ 01:50:23	Moved to PT Employment - Benefits Change	Eligibility Change	[Company User] Alice Admin	No

1 returned journal record

Print

Back



Logout, alice.admin.

Employee: Peter HUBster

SSN: xxx-xx-0005

EE Enrollment Status: Incomplete

Payroll ID:

Show More

EMPLOYEE ADMINISTRATION

Add Journal Entry

Fields in bold are required.



Journal Date 5/7/2026 date in format, mm/dd/yyyy

Category Benefit Question

Subject Employee Conversation

Notes
Spoke with employee about his questions on Medical insurance as he was wondering about covering his spouse during an upcoming job change. Employee stated that he would call back after speaking to his spouse about upcoming changes.



Upload a Journal File

Choose File

No file chosen

Add

Click to continue adding entries



Save

Cancel



Logout, alice.admin.

ADMINISTRATION MENU > EMPLOYEE SEARCH > EMPLOYEE MENU >

NEED HELP? | GIVE FEEDBACK

Employee: Peter HUBster

SSN: xxx-xx-0005

EE Enrollment Status: Incomplete

Payroll ID:

Show More



Journal Entry added.

JOURNAL INFORMATION

Below is the list of journal entries. To view an entry, click the journal date or subject.

Please Note:

When inputting notes in the Journal Information of an employee, anything related to salary will be shown to all administrators whether they have limited or non-limited access. Enter salary related information at the employers' discretion.

Add Journal Entry



Journal Date	Subject	Category	Created By	File Uploaded	<input type="checkbox"/> Delete
5/7/2026 @ 01:23:43	Employee Conversation	Benefit Question	[Company User] Alice Admin	No	<input type="checkbox"/>
8/19/2025 @ 01:50:23	Moved to PT Employment - Benefits Change	Eligibility Change	[Company User] Alice Admin	No	

2 returned journal records



Print

Back



08



Open Enrollment Scenario





Multi-Year Qualifying Events

Employee: Elaine Employee ▾

SSN: xxx-xx-0026

EE Enrollment Status: Complete

Payroll ID:

Show More ▾

EMPLOYEE ADMINISTRATION - EMPLOYEE, ELAINE



Employee
Information



Dependent
Information



Benefit Plan
Information



Add Spouse or Domestic Partner

Add Child

Add The Spouse



Click the "Save" button at the bottom of the page after you've entered the spouse/ex-spouse information.

Spouses are eligible for health insurance and supplemental insurance benefits. The option for domestic partners is listed for beneficiary choice only. Domestic partners are not eligible for health insurance and supplemental insurance benefits.

Fields in bold are required.

General Information

First Name

Initial

Last Name

Title

Relationship

Social Security Number nine digits - no dashes or spaces

Gender

Date of Birth in date format, mm/dd/yyyy

Date of Marriage in date format, mm/dd/yyyy

Contact Information

Residential Address

City

State

County

Postal Code

Use Residential Address as Mailing Address

Mailing Address

City

State

Zip Code

Home Phone

Health Information

Tobacco User

Is this Dependent Disabled?

Additional Information

Is your spouse currently age 65 or older? Yes No

www.thebenefitshub.com says

You are adding a spouse or domestic partner. However, this action does not automatically enroll this individual into your current plan elections.

Would you like to make plan elections for this individual now?

Cancel

OK



Add The Spouse

01



Spouse Information Added.

EMPLOYEE ADMINISTRATION

Below is the list of the elections effective as of 5/14/2026.

To view elections effective at other dates, click the corresponding date in the list below. To edit an existing benefit plan election, click the corresponding name of the benefit plan type. Benefit Plans with a "*" have multiple policies. The Coverage and Employee Cost listed are the total amounts of all policies.

Eligible Plan Types
Basic Life
Medical
Medical Declination
Medical Offering
Dental
Vision
Cancer
Long Term Disability
Employee Life
AD&D
HealthCare Reimbursement
Legal Plans

▼ Effective Today		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 8/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00
▼ Effective 9/1/2026		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective on 9/1/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00



Show All

[Click here](#) to view the employee eligibility report.

Back

Edit The Benefit(s)



Current Dental Plan Election	Coverage	Cost
Dental Plan View Plan Outline of Benefits	Elaine	\$5.00
Provided by Nexus Health Effective on 9/1/2026		

Available Dental Plans	Coverage	Cost
<input type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 9/1/2025 Select Tax Election Pre-tax ▾	<input type="checkbox"/> Elaine [employee] <input type="checkbox"/> Sam [spouse]	<input type="text"/>
<input checked="" type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 9/1/2026 Elected coverage effective on 9/1/2026 Select Tax Election Pre-tax ▾	<input checked="" type="checkbox"/> Elaine [employee] <input checked="" type="checkbox"/> Sam [spouse]	<input type="text" value="15.00"/>
<input type="radio"/> Employee waives enrollment in all available Dental plans		

Please enter the Effective Date for this new enrollment: mm/dd/yyyy

Please enter the Termination Date for past enrollment: mm/dd/yyyy



Save

Cancel

Election Summary
Costs shown are as of 4/30/2025
Basic Life
Medical
Medical Declination
Medical Offering
Dental \$ <input type="text" value="15.00"/>
Vision
Cancer
Long Term Disability
Employee Life
AD&D
HealthCare Reimbursement
Legal Plans
Monthly Payroll Deduction \$ <input type="text" value="15.00"/>

Edit The Benefit(s)



Detour ! Alert

“

How can you quickly check to see if export files are still being delivered to carriers?

”

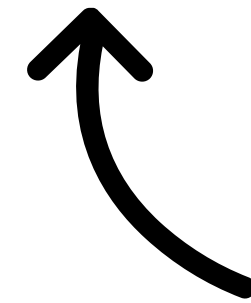


EXPORT SUMMARY

This page displays all current, actively delivering exports as well as future exports that are finalized for delivery. For information on past exports, please contact your Account Representative and a report will be made available.

Export Name	First Production File	Last Scheduled Date	Schedule Name	Run Frequency
American Health Plans - Dental - Ongoing [Training]	12/25/2024	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday
American Health Plans - Vision - Ongoing [Training]	08/21/2019	-	American Health Plans [Training] - Ongoing - Every other Wednesday	Every 2 weeks on Wednesday

Back



The Export Summary is a great place to check and confirm if files are still being delivered to the carriers!



EMPLOYEE ADMINISTRATION

Below is the list of the elections effective as of 4/30/2025.

To view elections effective at other dates, click the corresponding date in the list below. To edit an existing benefit plan election, click the corresponding name of the benefit plan type. Benefit Plans with a "*" have multiple policies. The Coverage and Employee Cost listed are the total amounts of all policies.

Eligible Plan Types
Basic Life
Medical
Medical Declination
Medical Offering
Dental
Vision
Cancer
Long Term Disability
Employee Life
AD&D
HealthCare Reimbursement
Legal Plans

▼ Effective Today		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 8/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00
▼ Effective 9/1/2026		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective on 9/1/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine Spouse, Sam [Spouse]	\$15.00
Total Monthly Payroll Deduction		\$15.00

[Show All](#)

[Click here](#) to view the employee eligibility report.

Back

Edit The Benefit(s)



Current Dental Plan Election	Coverage	Cost
Dental Plan View Plan Outline of Benefits	Elaine	\$5.00
Provided by Nexus Health Effective on 9/1/2026		

Available Dental Plans	Coverage	Cost
<input type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 9/1/2025 Select Tax Election Pre-tax ▾	<input type="checkbox"/> Elaine [employee] <input type="checkbox"/> Sam [spouse]	<input type="text"/>
<input checked="" type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 9/1/2026 Elected coverage effective on 9/1/2026 Select Tax Election Pre-tax ▾	<input checked="" type="checkbox"/> Elaine [employee] <input type="checkbox"/> Sam [spouse]	<input type="text" value="5.00"/>
<input type="radio"/> Employee waives enrollment in all available Dental plans		

Please enter the Effective Date for this new enrollment: mm/dd/yyyy

Please enter the Termination Date for past enrollment: mm/dd/yyyy

Election Summary
Costs shown are as of 4/30/2025
Basic Life
Medical
Medical Declination
Medical Offering
Dental
\$ <input type="text" value="5.00"/>
Vision
Cancer
Long Term Disability
Employee Life
AD&D
HealthCare Reimbursement
Legal Plans
Monthly Payroll Deduction
\$ <input type="text" value="5.00"/>

Edit The Benefit(s)



Current Dental Plan Election	Coverage	Cost
Dental Plan View Plan Outline of Benefits	Elaine Sam [Spouse]	\$15.00

Provided by Nexus Health
Effective on 9/1/2026

www.thebenefitshub.com says

This enrollment change cannot be made at this time. However, you may make this change if you have one of the following Qualifying Events:

- **Benefits Administrator Correction between 4/30/2025 and 4/30/2027
- *Broker Only Correction between 4/30/2025 and 4/30/2027
- Adoption between 3/31/2026 and 5/30/2026

Available Dental Plans	Coverage
<input type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 9/1/2025 Select Tax Election <input type="text" value="Pre-tax"/>	<input type="checkbox"/> Elaine [employee] <input type="checkbox"/> Sam [spouse]
<input checked="" type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 9/1/2026 Elected coverage effective on 9/1/2026 Select Tax Election <input type="text" value="Pre-tax"/>	<input checked="" type="checkbox"/> Elaine [employee] <input checked="" type="checkbox"/> Sam [spouse]

www.thebenefitshub.com says

This enrollment change cannot be made at this time. However, you may make this change if you have one of the following Qualifying Events:

- **Benefits Administrator Correction between 4/30/2025 and 4/30/2027
- *Broker Only Correction between 4/30/2025 and 4/30/2027
- Adoption between 3/31/2026 and 5/30/2026
- Birth between 3/31/2026 and 5/30/2026
- Change in Dependent Eligibility between 3/31/2026 and 5/30/2026



Employee waives enrollment in all available Dental plans

Please enter the Effective Date for this new enrollment: mm/dd/yyyy

Please enter the Termination Date for past enrollment: mm/dd/yyyy



EMPLOYEE ADMINISTRATION

Qualifying Event Information - Employee, Elaine

Qualifying Event

Marriage [23]



Qualifying Date

5/14/2026

in date format, mm/dd/yyyy

Continue

Reset

Cancel

Edit The Benefit(s)



Current Dental Plan Election	Coverage	Cost
------------------------------	----------	------

Dental Plan Elaine \$5.00

[View Plan Outline of Benefits](#)

Provided by Nexus Health

Effective on 9/1/2025

Available Dental Plan	Coverage	Cost
-----------------------	----------	------

Dental Plan Elaine [employee] 5.00

[View Plan Outline of Benefits](#)

Provided by Nexus Health

Eligible on 5/14/2026

Elected coverage effective on 9/1/2025

Select Tax Election

Pre-tax ▾

Employee waives enrollment in the available Dental plan

Please enter the Effective Date for this new enrollment: mm/dd/yyyy

Please enter the Termination Date for past enrollment: mm/dd/yyyy

Election Summary

Costs shown are as of 5/14/2026

[Basic Life](#)

[Medical](#)

[Medical Declination](#)

[Medical Offering](#)

Dental

\$ 5.00

[Vision](#)

[Cancer](#)

[Long Term Disability](#)

[Employee Life](#)

[AD&D](#)

[HealthCare Reimbursement](#)

[Legal Plans](#)

Monthly Payroll Deduction

\$ 5.00

Save Cancel

Edit The Benefit(s)



Current Dental Plan Election	Coverage	Cost
Dental Plan View Plan Outline of Benefits	Elaine	\$5.00
Provided by Nexus Health Effective on 9/1/2025		

Available Dental Plan	Coverage	Cost
<input checked="" type="radio"/> Dental Plan View Plan Outline of Benefits Provided by Nexus Health Eligible on 5/14/2026 Elected coverage effective on 9/1/2025 Select Tax Election <input type="text" value="Pre-tax"/>	<input checked="" type="checkbox"/> Elaine [employee] <input checked="" type="checkbox"/> Sam [spouse]	<input type="text" value="15.00"/>
<input type="radio"/> Employee waives enrollment in the available Dental plan		

Please enter the Effective Date for this new enrollment: mm/dd/yyyy

Please enter the Termination Date for past enrollment: mm/dd/yyyy

Election Summary
Costs shown are as of 5/14/2026
Basic Life
Medical
Medical Declination
Medical Offering
Dental
\$ <input type="text" value="15.00"/>
Vision
Cancer
Long Term Disability
Employee Life
AD&D
HealthCare Reimbursement
Legal Plans
Monthly Payroll Deduction
\$ <input type="text" value="15.00"/>

Edit The Benefit(s)



EMPLOYEE ADMINISTRATION

Below is the list of the elections effective as of qualifying event date 5/14/2026.

To view elections effective at other dates, click the corresponding date in the list below. To edit an existing benefit plan election, click the corresponding name of the benefit plan type. Benefit Plans with a "*" have multiple policies. The Coverage and Employee Cost listed are the total amounts of all policies.

Effective Today		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 5/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00
Effective 6/1/2026		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 6/1/2026 to 8/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine Spouse, Sam [Spouse]	\$15.00
Total Monthly Payroll Deduction		\$15.00
Effective 9/1/2026		
Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective on 9/1/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine Spouse, Sam [Spouse]	\$15.00
Total Monthly Payroll Deduction		\$15.00



Eligible Plan Types
Basic Life
Medical
Medical Declination
Medical Offering
Dental
Vision
Cancer
Long Term Disability
Employee Life
AD&D
HealthCare Reimbursement
Legal Plans

Show All

[Click here](#) to view the employee eligibility report.

Back

Edit The Benefit(s)



Employee: Elaine Employee ^

SSN: xxx-xx-0026

EE Enrollment Status: Incomplete

Payroll ID:

Show More v

Add Journal Entry

Change Employee

Copy to Clipboard

ADMINISTRATION

Below is the list of the elections effective as of qualifying event date 5/14/2026.

To view elections effective at other dates, click the corresponding date in the list below. To edit an existing benefit plan election, click the corresponding name of the benefit plan type. Benefit Plans with a "*" have multiple policies. The Coverage and Employee Cost listed are the total amounts of all policies.

Eligible Plan Types

- Basic Life
- Medical
- Medical Declination
- Medical Offering
- Dental
- Vision
- Cancer
- Long Term Disability
- Employee Life
- AD&D
- HealthCare Reimbursement
- Legal Plans

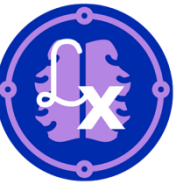
Effective Today

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 5/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00

Effective 6/1/2026

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 6/1/2026 to 8/31/2026 Provided by Nexus Health Policy Number: -	Employee, Elaine Spouse, Sam [Spouse]	\$15.00

Add Journal Entry



EMPLOYEE ADMINISTRATION

Add Journal Entry

Fields in bold are required.

Journal Date date in format, mm/dd/yyyy

Category

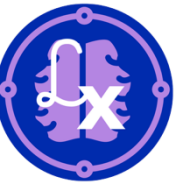
Subject

Notes

Upload a Journal File Elaine-Empl...rtificate.png

Click to continue adding entries

Add Journal Entry



Multi-Year Qualifying Events

1

2

3

▼ Effective Today

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 8/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00

▼ Effective 9/1/2026

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective on 9/1/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00

▼ Effective Today

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 8/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00

▼ Effective 9/1/2026

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective on 9/1/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine Spouse, Sam [Spouse]	\$15.00
Total Monthly Payroll Deduction		\$15.00

▼ Effective Today

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 9/1/2025 to 5/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine	\$5.00
Total Monthly Payroll Deduction		\$5.00

▼ Effective 6/1/2026

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective from 6/1/2026 to 8/31/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine Spouse, Sam [Spouse]	\$15.00
Total Monthly Payroll Deduction		\$15.00

▼ Effective 9/1/2026

Benefit Plan	Coverage	Employee Cost
Dental - Dental Plan Effective on 9/1/2026 Provided by Nexus Health Policy Number: - Cost is deducted on a pre-tax basis	Employee, Elaine Spouse, Sam [Spouse]	\$15.00
Total Monthly Payroll Deduction		\$15.00



09



Best Practices



THE *benefits*HUB Open Enrollment Prep List

Simple things to make sure are in good order before your Open Enrollment begins!



IMNS
Discrepancies



Evidence of
Insurability



Qualifying
Events



Company
Acknowledgments



Product
Wording



General
Communication



THE *benefits*HUB Open Enrollment Action List

Simple things to help your Open Enrollment continue running as smoothly as possible!



IMNS
Discrepancies



Login
Statistics



General
Communication



Evidence of
Insurability



Qualifying
Events



THE *benefits*HUB Open Enrollment Wrap-Up List

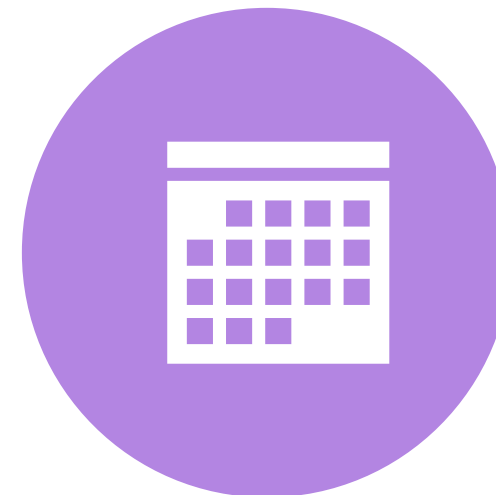
*Simple things to make sure are in
good order after your Open
Enrollment ends!*



IMNS
Discrepancies



Evidence of
Insurability



Export
Summary



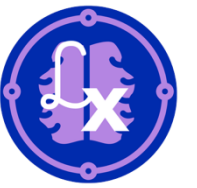
Qualifying
Events



11



Open Enrollment Assessment



Open Enrollment Assessment

Are you ready for Open Enrollment?

Scoring:

- **Complete/Validated:** 2 Points
- **In Progress:** 1 Point
- **Not Started:** 0 Points

Your Readiness Score:

<5 Points	Not Ready – Major Risks
6-9 Points	At Risk – Significant Risks
10-15 Points	Mostly Ready – Mild Risks
16-18 Points	Ready to Enroll!

Open Enrollment Tasks	Your Points
Pending Evidence of Insurability	
Pending Qualifying Life Events	
Pending IMNS Dashboard Items	
Product Wording Validation	
Company Acknowledgments Validation	
Data Continuation Report Discrepancies	
Payroll Codes / Dates Update	
General Communication Delivery	
Test Walkthrough Completion	



Thank you for attending!

Need more help?
Contact us with any questions at learn@allsynx.com