

## Employee Enrollment Worksheet for Renewal Groups for Brokers and Employers

Obtain Employee Enrollment Worksheets during the renewal or mid-year period to help employees make informed decisions at open enrollment or during qualified events.

The enrollment worksheets can be found by accessing the All or Selected Plans links on the client details screen under the renewals tab for brokers. For employers, by clicking Documents from the header and then Renewals.

After completing a Select Plans quote there is a list of available options under the What would you like to do next? section. To generate the worksheets, click on Generate and Email Enrollment Worksheets. On the next screen, make a selection for employer contributions. Other fields will open based on your selections.

Select a worksheet delivery option, whether you'd prefer to receive the worksheets for all employees in one document or separately, one PDF for each employee in a zip file. Click next.

On the Email My Worksheets screen, the contract signer and broker, if any, will be automatically selected and their email and name is listed. To send the worksheets to others, click Additional Recipients and enter the full email address into the field. You can designate your recipients by selecting or deselecting the boxes. Click Send. You will receive a confirmation that the worksheets should be delivered soon. Click Close.

You'll receive the worksheets as one PDF or a .zip file with the PDFs attached to an email. The options and costs are listed for each subscriber, and there is a field under this information where the plan choice is made.