

Using the HealthConnect to EaseCentral Export Functionality.

Easily transfer your group data, census information, plan rate and benefit information from Health Connect into EaseCentral with the new export functionality. Simply follow the five steps below to “quick start” your group’s enrollment process.



Step One: Prepare Your Group for Export

You can start a new group or use a group you have already quoted in HealthConnect. Make sure your group’s information and census is accurate. Double check the group’s zip code, effective date and the member’s birthdates and zip codes. Once you have made any necessary changes, you are ready to quote.

Pro Tip: If you use the advanced census view when editing a census, you can load each employee’s email address, which saves you from having to do this manually in the EaseCentral system. This works by adding the email address to the census import template.



Step Two: Quote Your Group

Here is where you pick out the plans you want to transfer to EaseCentral. Run through the quoting process, and select the plans you want to transfer over. If you want to use a quote that you have already run, you can save time and requote that option. Once you have selected the plans and reached the Report Options page, there is no need to run any additional reports. Just scroll down to the Enrollment Export section — that is where you start the export process.



Step Three: Start Your Export

Near the bottom of the Report Options page, you will see the “Enrollment Export” button. Click to begin. You will see a quick overview of the effective date, total number of employees, and the number and names of the medical plans you will be exporting. If everything is correct, click on “Next.” On the next page, verify that your email address is correct. down to the Enrollment Export section — that is where you start the export process.

Important! You must use the email address for your EaseCentral account on this screen. If these do not match, you will get an error at the end of the export process.

On this page, you can also enter the group’s contribution schedule, including their payroll frequency and base plan (if using one). Once complete, click on next.



Step Four: Review and Export Your Data

On this page, you are going to review all your data that is being exported to EaseCentral. Review every piece; make sure it is all correct. If there is anything that needs to be changed, do it now before the export is pushed through. Now, click the “Submit” button. Next, HealthConnect will ask you to sign into EaseCentral as part of the export process to verify which EaseCentral account to export the data. Enter the appropriate domain name, and then log in to the system. Once you are logged in, you will need to grant HealthConnect access to your EaseCentral account, by clicking the “Grant Access” button, which is the final step in the process. With this done, the system will return you to HealthConnect and confirm your information was exported successfully.



Step Five: Review Data in EaseCentral (Optional)

Open a new browser window, type in your EaseCentral domain, and log into the system. There you can search for your newly exported group by the group name. Click on it to review the information in the EaseCentral system. You can review the employee information, employer information, and the rate and benefit information for the exported plans. Now that you have done all that, you can continue to prepare this group for enrollment and add supplementary information so the system is ready to deploy for your group’s enrollment.