

# easecentral

Partner Sales Guide for **BEERE&PURVES**  
Insurance Services



EaseCentral is one of the fastest growing online enrollment and HR solutions for small groups.



**We can help you shut the door  
on the competition.**

Without even knowing it, employers are being asked to sign over BOR's.

## WHO ALREADY USES EASECENTRAL?

EaseCentral works with more than **800 brokers**  
whose **30,000+ small businesses** have nearly  
**1 million employees** enrolling online.

# easecentral

The most competitive small & medium group solution in the market



## WHAT EASECENTRAL CLIENTS SAY



The site is simple to learn and operate, and our account teams can quickly build robust portals that simplify the administration of client benefits programs. EaseCentral is a great system and should be a key partner for anyone administering employee benefits programs.



**Dan Garfin, CHFC, CLU**

NFP, Director of Services, Key  
& Select Account



We have companies on their platform that range from 2 – 350 employees and are now helping the majority of our clients in this space remove paperwork from benefits administration. Employees like it and HR loves it. The bottom line is EaseCentral has helped bring about a wonderful and long overdue change to health insurance.



**Ian Rice, Broker**

Filice



EaseCentral is just that... easy to use and a great way to centralize all the key employee data that I need to support my small group client's with benefits administration. And anytime I get stuck, the service team is super.



**Robin Van Vliet**

Van Vliet Wellness Insurance Solution



“When I started my own agency, I had my book of business come with me. In the first year, my book more than doubled, and there's no way that would have happened without EaseCentral.”



**Nathan Craig, Broker**

Culture Insurance Services

# KNOW YOUR EASECENTRAL REP

Orange County



**Strategic Alliances Manager**  
rbunch@easecentral.com

# STRATEGY FOR SELLING EASECENTRAL

## Attention

Share the **“EaseCentral and Beere&Purves Overview”**. Stay up-to-date on new EaseCentral features and spark conversations with your brokers by signing up for our monthly Partner Newsletter.

## Sell

Diagnose a broker’s challenges and answer commonly asked questions using the **“EaseCentral - Broker Pain Points”** and **“Broker FAQs”** documents. Demonstrate how brokers can grow their book of business using EaseCentral by sharing this **testimonial video**. Remember, EaseCentral is simple enough for small brokers looking to eliminate paper forms and powerful enough for large brokers to implement a competitive enrollment and HR solution.

## Quick close

When a broker is interested, introduce them to EaseCentral for a 1-on-1 demo, or if they’re too hesitant, one of our **broker webinars**.

Contact Ryan Bunch | [rbunch@easecentral.com](mailto:rbunch@easecentral.com)

# EaseCentral

is an online benefits enrollment platform built for insurance brokers and employers. EaseCentral makes it simple to set up and manage benefits, onboard new hires, stay compliant and offer employees one destination for all their human resources information.



## **Simplify Enrollment**

Save time during open enrollment and ongoing management by eliminating paper forms, reducing errors, and creating digital employee files for you and your groups.



## **Increase Engagement**

Deepen your relationships with your groups by easily adding new lines of coverage, integrating benefits with their payroll provider and other HR services, and regularly promoting your solution.



## **Gain Visibility**

Stay on top of enrollment status, access group information 24/7 and support your groups year round with dashboards and reports.



# Easily manage employee benefits, onboarding, and compliance in one central location.



Simple and easy to use



Lower prices than the competition



Free training



No setup fees



For small and large groups

**Groups can be set up in less than 20 minutes!**

# Special Offer for your Brokers

## Access Beere&Purves Rate libraries

Beere&Purves has plan rates in EaseCentral that you can access and use to quickly enroll your groups.

## Beere&Purves will set up your groups

To make the transition to online enrollment even easier, Beere&Purves will set up your groups in EaseCentral.

## Preferred Pricing

If you purchase an EaseCentral subscription through Beere&Purves you'll receive:

**A credit of \$1.40 pepm for each medical life placed with B&P good for 12 months.**

## Submit Electronically

With Beere & Purves, you no longer have to key in spreadsheets to submit enrollments. Beere&Purves offers the option for you to submit enrollments directly to them through EaseCentral's electronic submission feature.

# MATERIALS AVAILABLE TO YOU



## Educational Materials

- EaseCentral monthly Partner Newsletter (to sign up contact [ryan@easecentral.com](mailto:ryan@easecentral.com))
- EaseCentral's **blog** with company announcements



## Promotional Materials

- EaseCentral and **Beere&Purves Overview**
- EaseCentral **Broker Webinar**
- EaseCentral **Broker Testimonial Video** (1minute, 30seconds)
- Broker **FAQs**
- Broker **Pain Points**
- Quarterly sales promotion (contact your marketing department)

Want more material on EaseCentral? Contact **[ryan@easecentral.com](mailto:ryan@easecentral.com)**

# CORE PRODUCT SUMMARY

1. Eascentral's robust forms library includes over 3,000 applications so employees can complete enrollment online.
2. EaseCentral's online system is rules-based so no fields are left incomplete.
3. Employees can compare plans side-by-side, read and watch informational content, and immediately see their costs.
4. Brokers can submit downloaded census files to carriers for implementation, saving time and providing a faster approval process.
5. Dashboards and reports allow brokers and admins to stay up to date on enrollment progress.
6. Digital employee files are created when you set up groups. This file can sync with Payroll, HRIS and other services, reducing multiple entry and keeping everything up to date.
7. New hires can complete W-4, I-9 and other information, review digital policy documents, and enroll in benefits in one session.
8. Free training and access to 24/7 support team.

# EASECENTRAL SUBSCRIPTION FEATURE LIST

## Online Enrollment

- Rate quoting
- Replace paper with over 3,000 Carrier-mapped forms provided
- Census files can be generated in EaseCentral for carriers
- Rules based system and employer and carrier rules are automatically enforced
- Support for Spanish Enrollment
- Create your own plan libraries
- Ability to access GA plan libraries
- EaseCentral completes .pdf carrier applications with employee demographic, dependents, and enrollment data for easy distribution to carriers.
- Directly submit to GAs
- Comprehensive support center for you and your groups

## Engagement

- Integrates with Payroll provider
- Integrates with Time off tracking, performance reviews and other EaseCentral HRIS solutions
- Co-branded Marketing brochures and videos for you to communicate with your groups
- Carrier integrations to make it easy to add additional lines of coverage
- Embed carrier videos in enrollment experience
- Access to a marketplace of services you can control and offer your groups

## Dashboards and Reporting

- Open enrollment and maintenance throughout the year (ATC)
- Enrollment progress reports
- Build custom reports

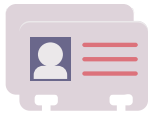
## Onboarding

- Custom welcome message
- Create a digital employee file
- Add emergency contact information
- Complete W-4, I-9 and Direct Deposit online
- Information stored securely in the cloud
- Upload and have employees review onboarding docs.
- E-sign to verify you've read company onboarding docs
- Syncs with benefits
- Create and extend offer letters to applicants

# Marketplace Services

	PRODUCT	PRICE	DESCRIPTION
	HRIS	\$4 pepm	PTO tracking, performance reviews, company directory and more.
	ACA Reporting	\$6 per form	Generate 1095 forms to submit to the IRS.
	Payroll Integration	starting at \$0 pepm <i>(setup fees may apply)</i>	Integrations include Paylocity, TRAXpayroll, and ADP Workforce Now.
	HR Admin Resource	\$49-199 / month	HR Support Center for HR admins. Stay on top of HR news, law changes, and training.
	HR Admin Resource	\$19 / month	24/7 instant chat resource for HR Admins to get answers to their HR questions.

# ADD-ONS/INTEGRATIONS FEATURE LIST



## ACA

- Deliver required notifications:
  - Model exchange notice
  - Initial COBRA notice
  - Custom documents
- Identify, measure and track variable hour employees
- Ensure coverage meets minimum affordability guidelines
- Generate signature-ready IRS 1094C and 1095C forms
- Track plans that meet Minimum Value standards
- Use the ALE Calculator to determine if an employer has to participate in ACA reporting
- Help employers avoid unnecessary penalties and fees



## HRIS

- Time-off tracking
- Performance reviews
- Org Chart
- Company Directory
- HR Stats
- Employee Surveys
- Milestones and Events



## Payroll Integration

- Quickly set up new employees with a payroll provider by sending info from EaseCentral
- Deduction changes are automatically sent to payroll provider
- With some payroll integrations, employees can view paystubs in EaseCentral