

Ease → Employee Navigator

Migration Checklist



Pre-Migration Readiness

- Employee Navigator brokerage subscription confirmed
- Login access to Ease and Employee Navigator
- Group is not in open enrollment (recommend 2 months before or 2 months after)

Review Migration Readiness in Ease

- Open Employee Navigator Migration Dashboard
- Search group and refresh readiness status
- Open readiness report

Resolve Blocking Errors in Ease

- Company/Plan errors
- Employee errors
- Refresh to confirm no errors remain

Review Warnings

- Review non-blocking warnings
- Confirm group is Ready for Migration

Initiate Migration

- Select company and click Migrate
- Confirm destination brokerage
- Log into Employee Navigator and confirm

Post-Migration

- Review migration report
- Verify company, employees, plans, documents
- Reset integrations in Employee Navigator

Final Confirmation

- Group is ready only with disabled integrations in Ease
- Login access to Ease and Employee Navigator
- All future updates occur in Employee Navigator