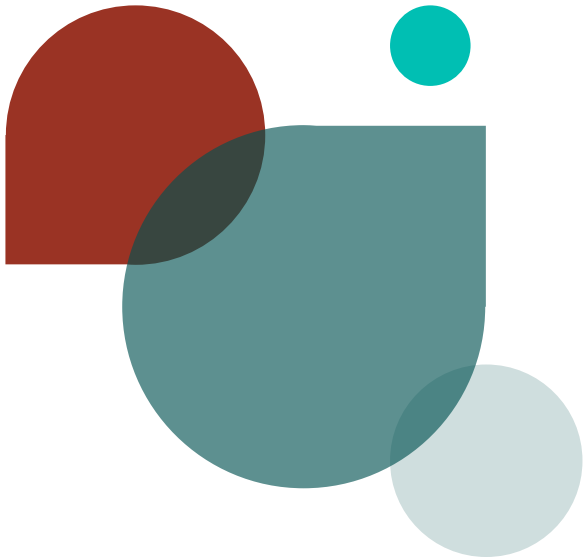


Ease → Employee Navigator Migration Walkthrough



B&P Migration Assistance

Resources

- Ease → EN Checklist
- Migration FAQs
- Adding a Company
- Enabling B&P in EN
- How to Video

Support

- Help auditing warning/errors in Ease
- Assist updating Employee Navigator
- Discuss strategy surrounding timing of migration
- Questions, contact:
onlineenrollment@beerepurves.com

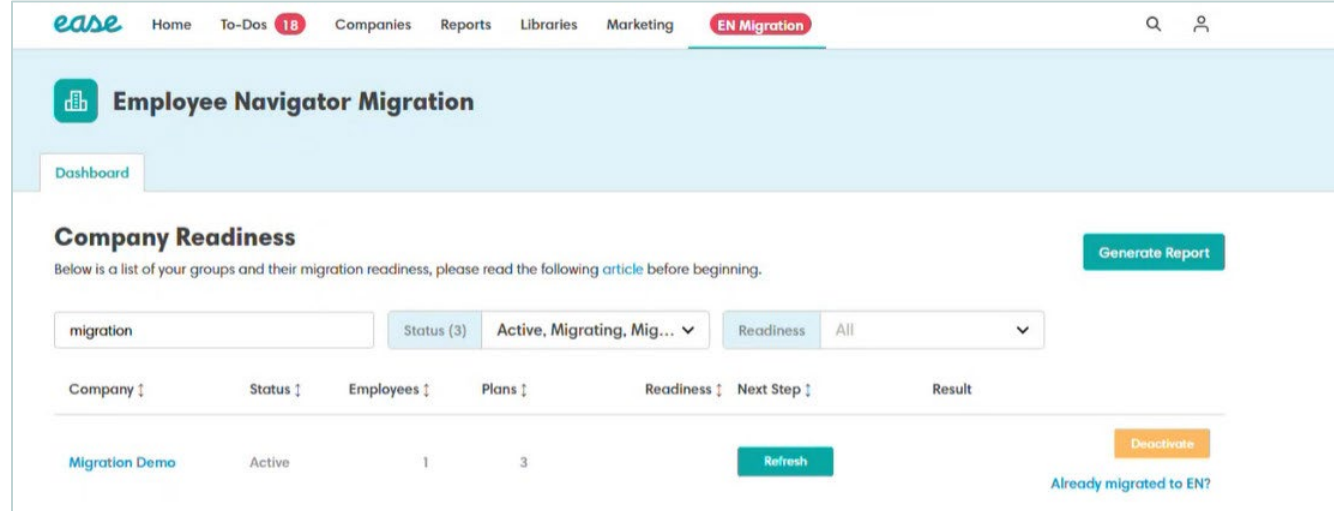
Open the Migration Dashboard in Ease

- **Accessing the Migration Dashboard**

- Users select the EN Migration option in Ease to view all groups and their migration status in one place.

- **Centralized Group Status**

- Dashboard displays readiness, employee counts, plan counts, and next-step indicators for groups.



The screenshot shows the 'Employee Navigator Migration' dashboard in the 'ease' system. The navigation bar includes 'Home', 'To-Dos' (18), 'Companies', 'Reports', 'Libraries', 'Marketing', and 'EN Migration' (highlighted). The dashboard title is 'Employee Navigator Migration' with a 'Dashboard' tab selected. Below the title, there is a 'Company Readiness' section with a 'Generate Report' button. A search bar contains 'migration'. The 'Status (3)' dropdown is set to 'Active, Migrating, Mig...' and the 'Readiness' dropdown is set to 'All'. A table displays migration data for 'Migration Demo'.

Company	Status	Employees	Plans	Readiness	Next Step	Result
Migration Demo	Active	1	3			

Additional UI elements include a 'Refresh' button, a 'Deactivate' button, and a link 'Already migrated to EN?'.

Refresh Readiness & Review Status

- **Refresh Function Purpose**

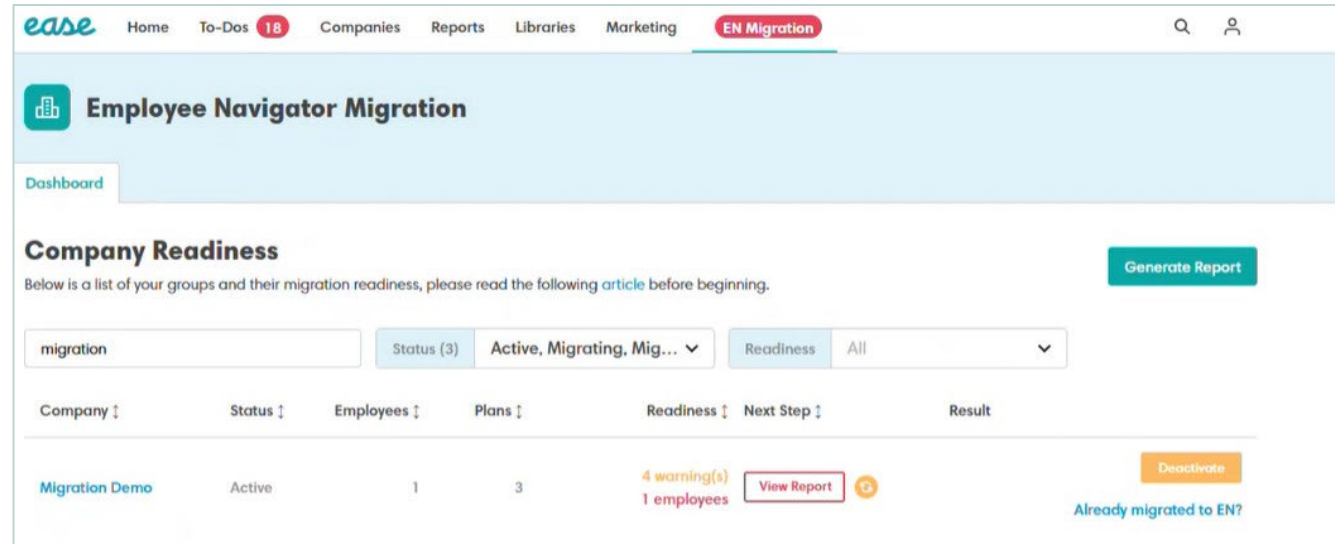
- The Refresh feature updates group data to reflect recent changes and ensures compliance with migration rules.

- **Readiness Indicators**

- Readiness status shows errors, warnings, or readiness to guide migration decisions and preparation.

- **Importance of Review**

- Groups can be migrated with warnings but not with errors.

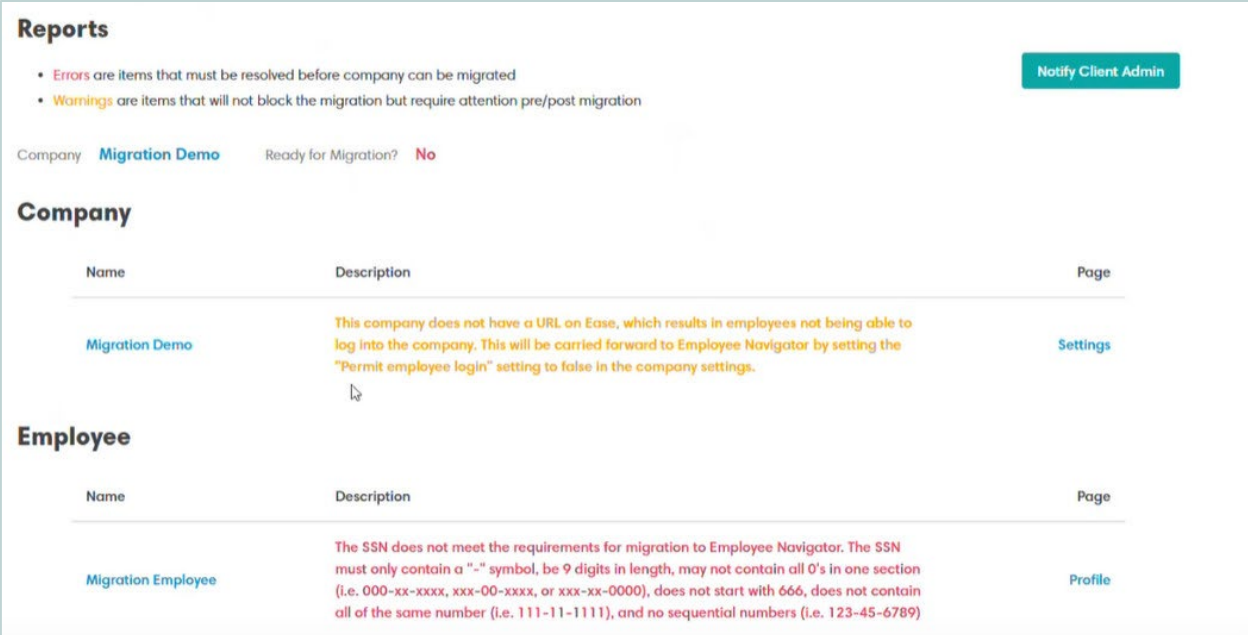


The screenshot displays the EASE Employee Navigator Migration dashboard. The navigation bar includes 'Home', 'To-Dos 18', 'Companies', 'Reports', 'Libraries', 'Marketing', and 'EN Migration'. The main heading is 'Employee Navigator Migration'. Below this, there is a 'Dashboard' tab and a 'Company Readiness' section. A 'Generate Report' button is visible. The main content area shows a search filter for 'migration', a status dropdown set to 'Active, Migrating, Mig...', and a readiness dropdown set to 'All'. A table lists migration groups with columns for Company, Status, Employees, Plans, Readiness, Next Step, and Result. The 'Migration Demo' group is shown with an 'Active' status, 1 employee, and 3 plans. It has 4 warnings and 1 employee with a 'View Report' button. A 'Deactivate' button is also present, along with a note 'Already migrated to EN?'.

Company	Status	Employees	Plans	Readiness	Next Step	Result
Migration Demo	Active	1	3	4 warning(s) 1 employees	View Report	Deactivate Already migrated to EN?

View the Migration Readiness Report

- **Detailed Diagnostic Insight**
 - The report identifies specific issues affecting migration at both company and employee levels for precise troubleshooting.
- **Clear Error Identification**
 - Errors are clearly highlighted with explanations, helping users understand and resolve critical blocking issues effectively.
- **Guidance on Warnings**
 - Warnings provide helpful guidance on items that might need attention but do not prevent migration progress.
- **Facilitates Smooth Migration**
 - The report removes guesswork, enabling targeted corrective actions that ensure efficient and smooth migration.



Reports

- **Errors** are items that must be resolved before company can be migrated
- **Warnings** are items that will not block the migration but require attention pre/post migration

Company **Migration Demo** Ready for Migration? **No** [Notify Client Admin](#)

Company

Name	Description	Page
Migration Demo	This company does not have a URL on Ease, which results in employees not being able to log into the company. This will be carried forward to Employee Navigator by setting the "Permit employee login" setting to false in the company settings.	Settings

Employee

Name	Description	Page
Migration Employee	The SSN does not meet the requirements for migration to Employee Navigator. The SSN must only contain a "-" symbol, be 9 digits in length, may not contain all 0's in one section (i.e. 000-xx-xxxx, xxx-00-xxxx, or xxx-xx-0000), does not start with 666, does not contain all of the same number (i.e. 111-11-1111), and no sequential numbers (i.e. 123-45-6789)	Profile

Resolve Blocking Errors Before Migration

- **Identify Blocking Errors**

- Blocking errors like missing URLs and invalid SSNs must be identified before migration can proceed.

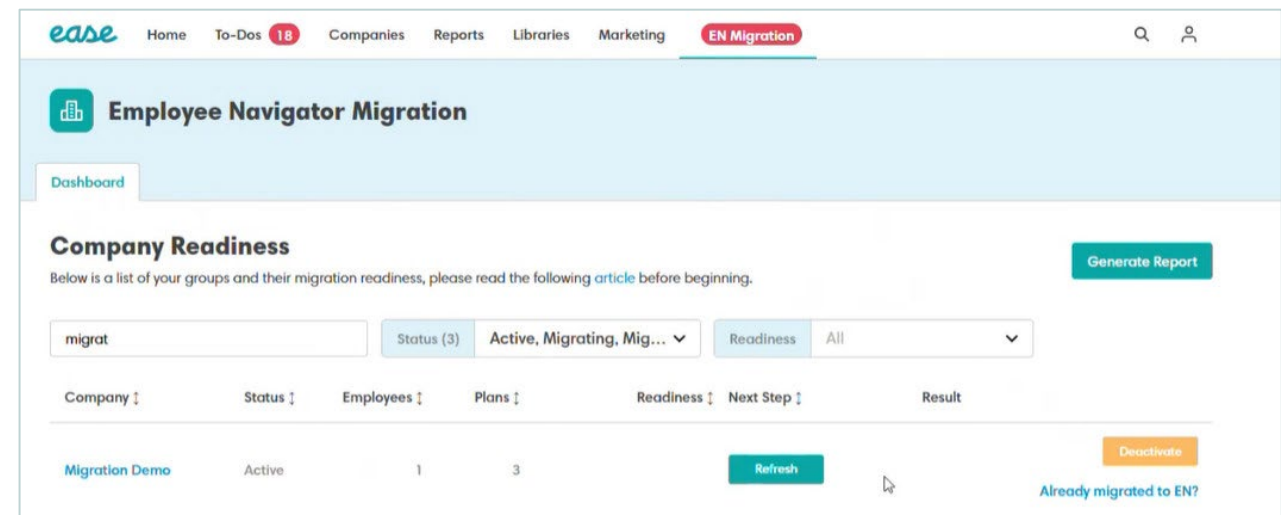
Name	Description	Page
Migration Employee	The SSN does not meet the requirements for migration to Employee Navigator. The SSN must only contain a "-" symbol, be 9 digits in length, may not contain all 0's in one section (i.e. 000-xx-xxxx, xxx-00-xxxx, or xxx-xx-0000), does not start with 666, does not contain all of the same number (i.e. 111-11-1111), and no sequential numbers (i.e. 123-45-6789)	Profile

- **Use Readiness Report**

- The readiness report provides direct links to fix errors efficiently and accurately.

- **Confirm and Refresh Status**

- After corrections, confirm fixes are saved and refresh status to verify errors are resolved.



The screenshot shows the EASE Employee Navigator Migration dashboard. At the top, there is a navigation bar with 'Home', 'To-Dos' (18), 'Companies', 'Reports', 'Libraries', 'Marketing', and 'EN Migration'. Below this is a header for 'Employee Navigator Migration' with a 'Dashboard' tab. The main content area is titled 'Company Readiness' and includes a 'Generate Report' button. A message states: 'Below is a list of your groups and their migration readiness, please read the following article before beginning.' There are filters for 'migrat', 'Status (3)', 'Active, Migrating, Mig...', and 'Readiness All'. A table lists the migration groups with columns for Company, Status, Employees, Plans, Readiness, Next Step, and Result. The 'Migration Demo' group is shown as 'Active' with 1 employee and 3 plans. A 'Refresh' button is visible next to the group, and a 'Deactivate' button is in the bottom right corner. A note at the bottom right says 'Already migrated to EN?'.

Click Migrate to Start the Process

- **Initiate Migration**

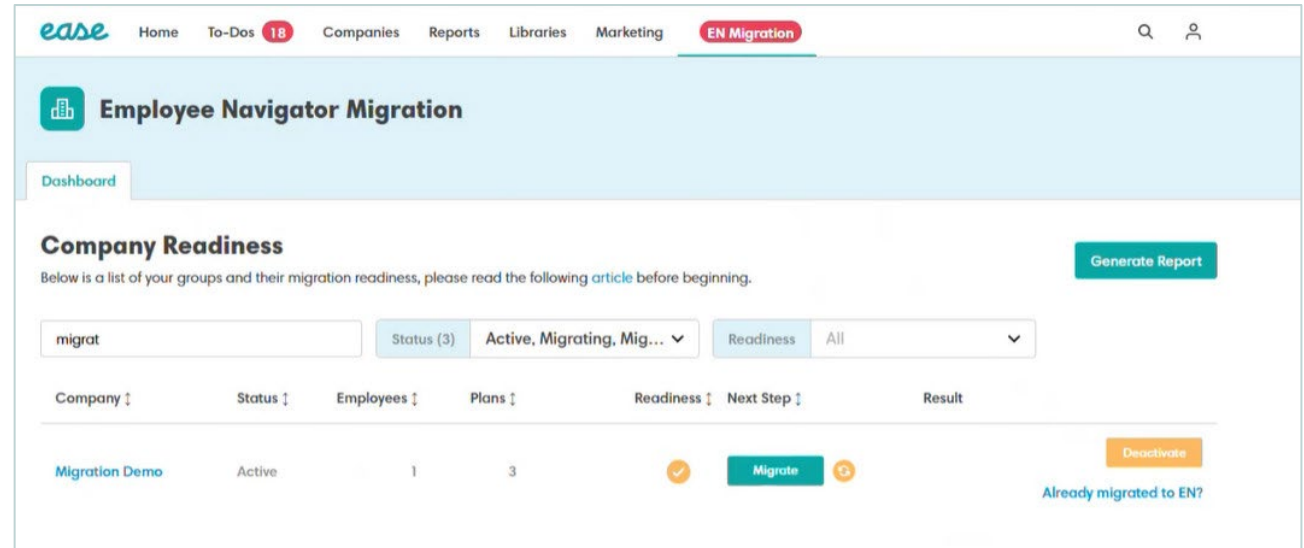
- Clicking Migrate starts the formal data transfer from Ease to Employee Navigator after all errors are fixed.

- **Confirm Readiness**

- Ensure no critical updates occur during migration to avoid losing changes or data inconsistencies.

- **Migration Process Importance**

- Clicking Migrate confirms that all preparation steps are complete and the group is ready to proceed.

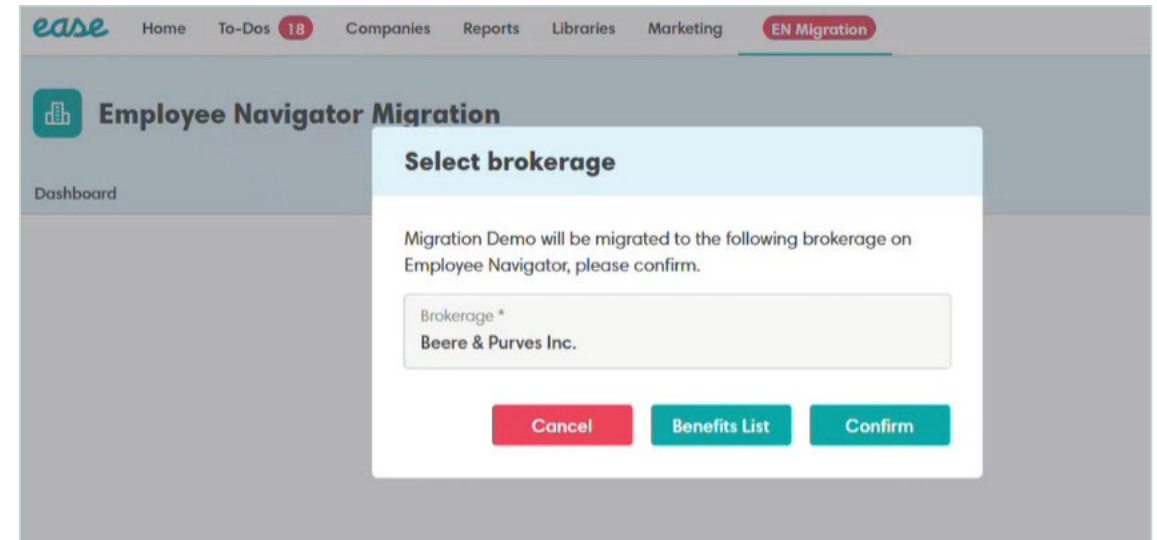


The screenshot shows the 'Employee Navigator Migration' dashboard. At the top, there is a navigation bar with 'ease' logo and menu items: Home, To-Dos (18), Companies, Reports, Libraries, Marketing, and EN Migration. Below the navigation bar is a header for 'Employee Navigator Migration' with a 'Dashboard' tab. The main content area is titled 'Company Readiness' and includes a 'Generate Report' button. Below this, there is a search bar with 'migrat' and filters for 'Status (3)' (Active, Migrating, Mig...) and 'Readiness' (All). A table lists migration groups with columns for Company, Status, Employees, Plans, Readiness, Next Step, and Result. One group, 'Migration Demo', is shown with Status 'Active', 1 Employee, and 3 Plans. It has a 'Migrate' button and a 'Deactivate' button. The result for this group is 'Already migrated to EN?'.

Company	Status	Employees	Plans	Readiness	Next Step	Result
Migration Demo	Active	1	3	✓	Migrate	Already migrated to EN?

Confirm Brokerage Destination

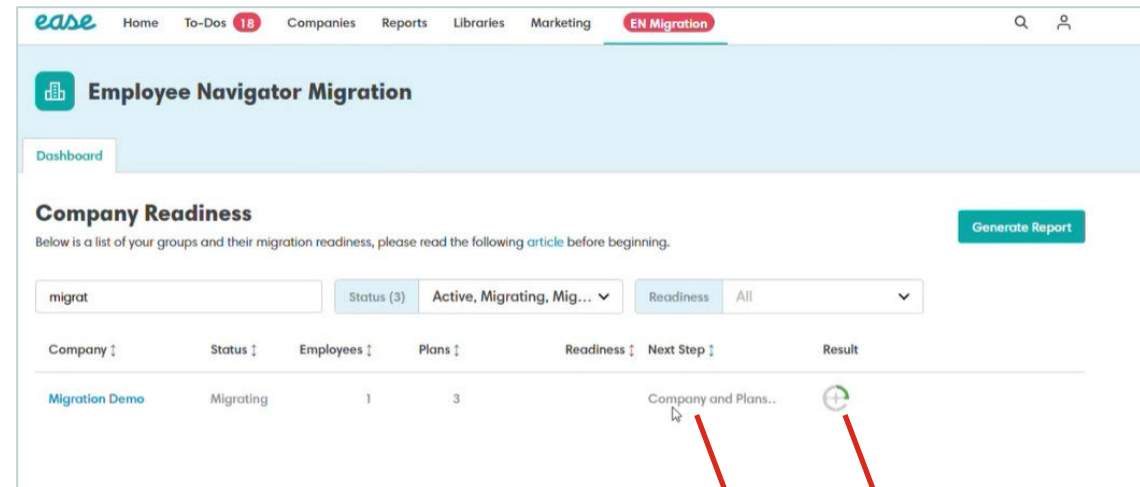
- **Brokerage Confirmation Importance**
 - Confirming the correct brokerage ensures proper administrative and support access after migration.
- **User Verification Step**
 - Users must carefully verify the brokerage name to avoid errors in group association.



The screenshot displays the 'ease' system interface for 'Employee Navigator Migration'. A modal dialog titled 'Select brokerage' is open, prompting the user to confirm the migration destination. The dialog text reads: 'Migration Demo will be migrated to the following brokerage on Employee Navigator, please confirm.' Below this text is a text input field containing 'Beere & Purves Inc.'. At the bottom of the dialog are three buttons: 'Cancel' (red), 'Benefits List' (teal), and 'Confirm' (teal). The background interface shows a navigation menu with 'Home', 'To-Dos 18', 'Companies', 'Reports', 'Libraries', 'Marketing', and 'EN Migration' (highlighted).

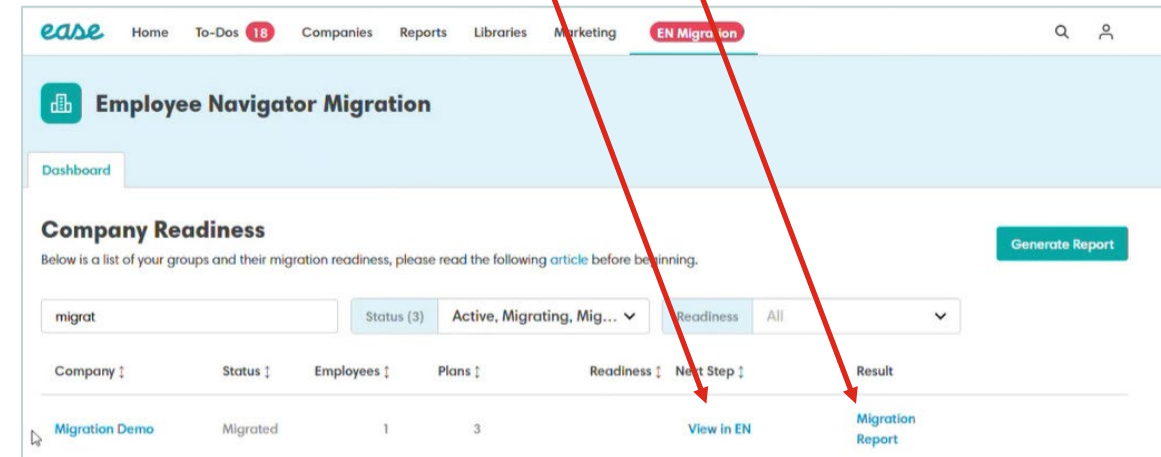
Migration In Progress and Completion

- **Real-time Migration Updates**
 - The dashboard displays live status changes during migration, keeping users informed of ongoing data transfers.
- **Migration Status Change**
 - Status updates from 'Migrating' to 'Migrated' mark the completion of the migration process.
- **Post-Migration Actions**
 - Links become accessible to view groups and reports, facilitating further management after migration. Ease will be in read only. Broker will ensure integrations disconnected in Ease and reconnected in EN



The screenshot shows the 'Employee Navigator Migration' dashboard. The 'Company Readiness' section displays a table with the following data:

Company	Status	Employees	Plans	Readiness	Next Step	Result
Migration Demo	Migrating	1	3		Company and Plans..	



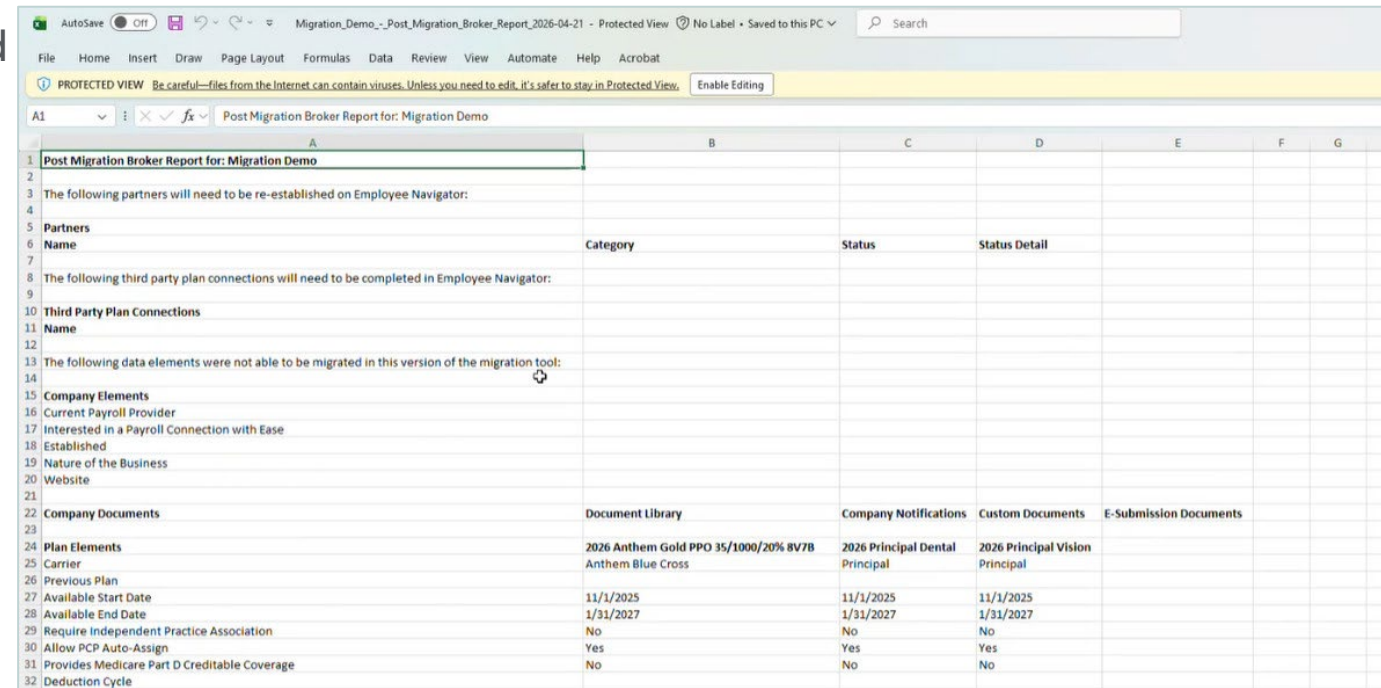
The screenshot shows the 'Employee Navigator Migration' dashboard after migration completion. The 'Company Readiness' section displays a table with the following data:

Company	Status	Employees	Plans	Readiness	Next Step	Result
Migration Demo	Migrated	1	3		View in EN	Migration Report

Red arrows from the top screenshot point to the 'View in EN' and 'Migration Report' links in this screenshot.

Migration Report

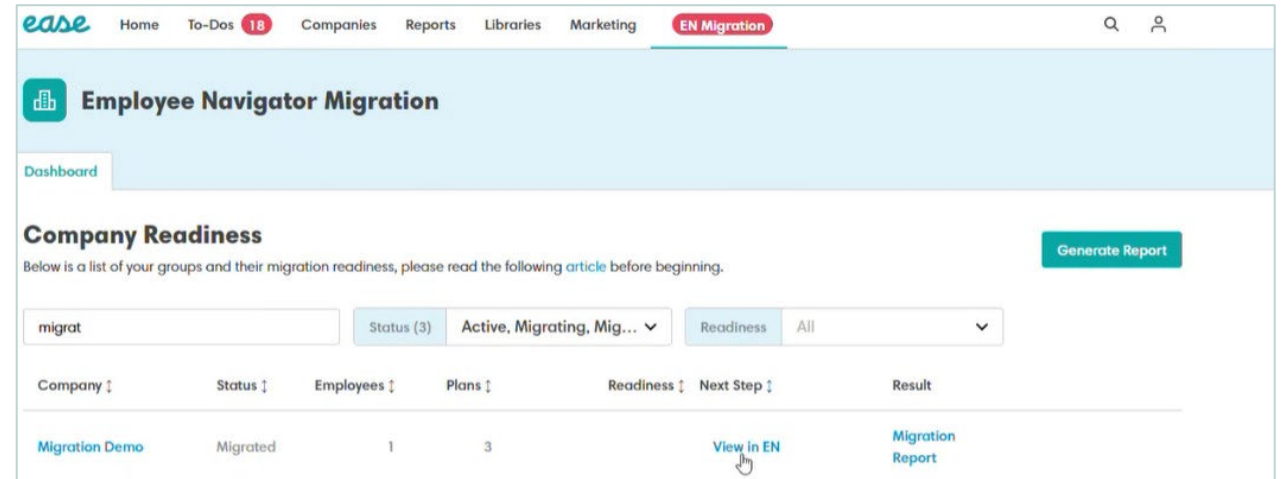
- **Click on the Migration Report**
 - This tool will note items migrated and any items that need to be manually updated in Employee Navigator



Post Migration Broker Report for: Migration Demo				
Partners				
Name	Category	Status	Status Detail	
The following third party plan connections will need to be completed in Employee Navigator:				
Third Party Plan Connections				
Name				
The following data elements were not able to be migrated in this version of the migration tool:				
Company Elements				
Current Payroll Provider				
Interested in a Payroll Connection with Ease				
Established				
Nature of the Business				
Website				
Company Documents				
	Document Library	Company Notifications	Custom Documents	E-Submission Documents
Plan Elements	2026 Anthem Gold PPO 35/1000/20% 8V7B	2026 Principal Dental	2026 Principal Vision	
Carrier	Anthem Blue Cross	Principal	Principal	
Previous Plan				
Available Start Date	11/1/2025	11/1/2025	11/1/2025	
Available End Date	1/31/2027	1/31/2027	1/31/2027	
Require Independent Practice Association	No	No	No	
Allow PCP Auto-Assign	Yes	Yes	Yes	
Provides Medicare Part D Creditable Coverage	No	No	No	
Deduction Cycle				

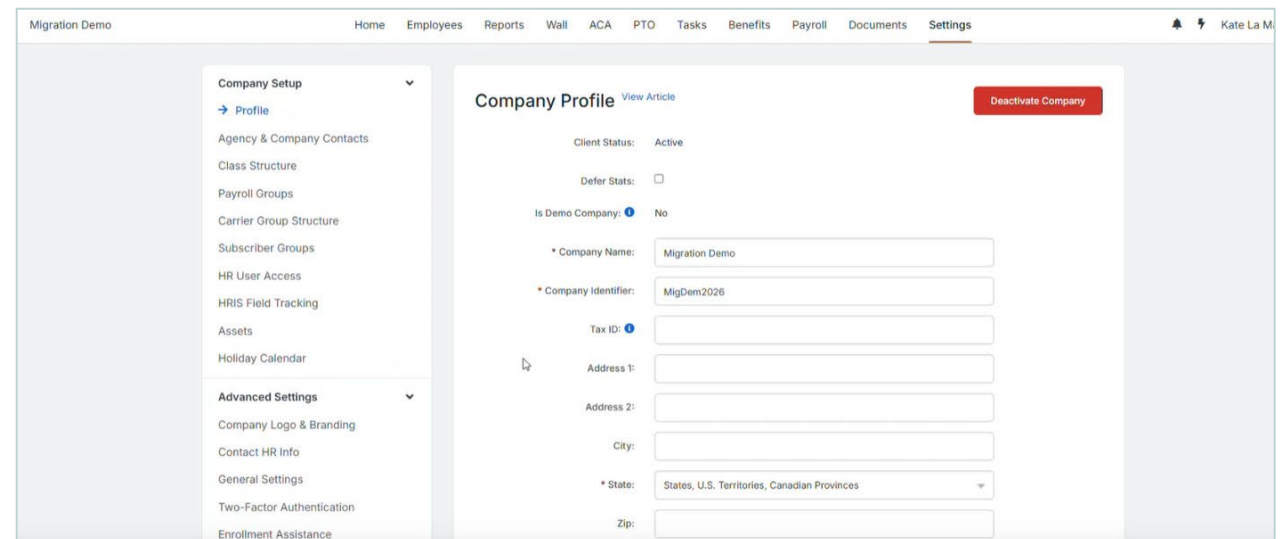
View in Employee Navigator

- Group is now read only in Ease and viewable in EN
- The broker can now view and edit the group as needed in Employee Navigator



The screenshot shows the 'Employee Navigator Migration' dashboard in the EASE system. The navigation bar includes 'Home', 'To-Dos 18', 'Companies', 'Reports', 'Libraries', 'Marketing', and 'EN Migration'. The main heading is 'Employee Navigator Migration' with a 'Dashboard' tab selected. Below this is a 'Company Readiness' section with a 'Generate Report' button. A search bar contains 'migrat'. There are filters for 'Status (3)' with options 'Active, Migrating, Mig...', and 'Readiness' set to 'All'. A table lists migration groups with columns for Company, Status, Employees, Plans, Readiness, Next Step, and Result. One entry, 'Migration Demo', is shown with a 'View in EN' link.

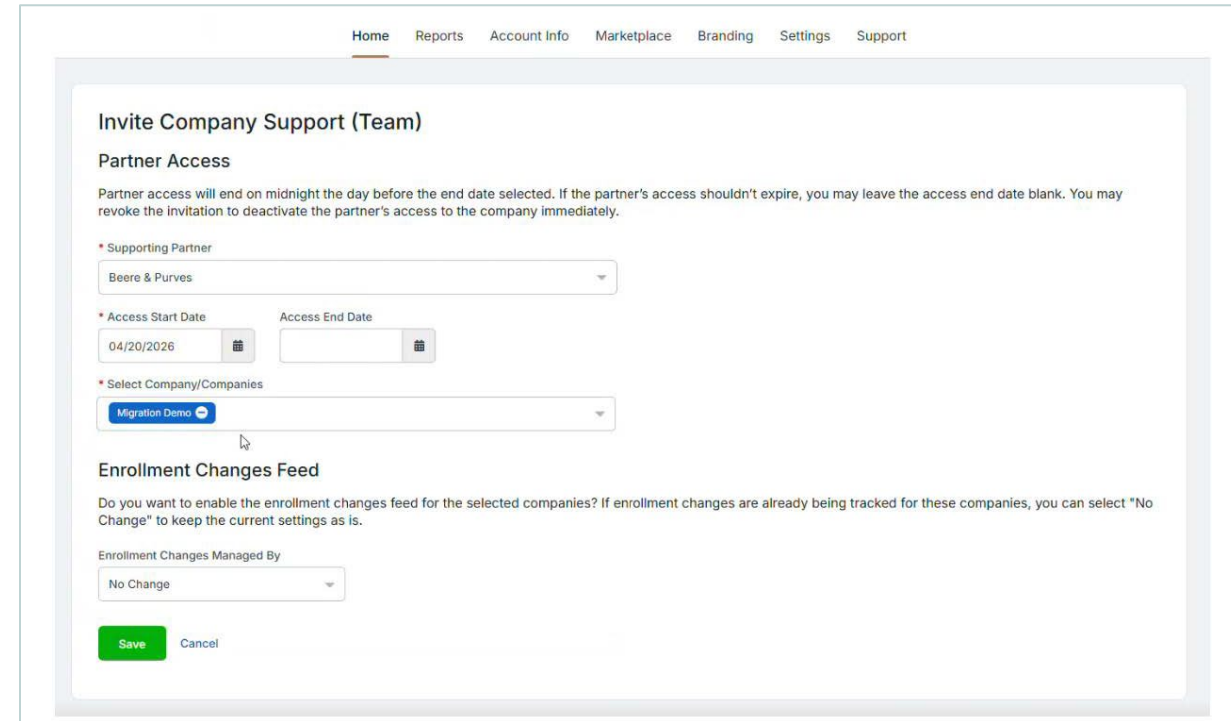
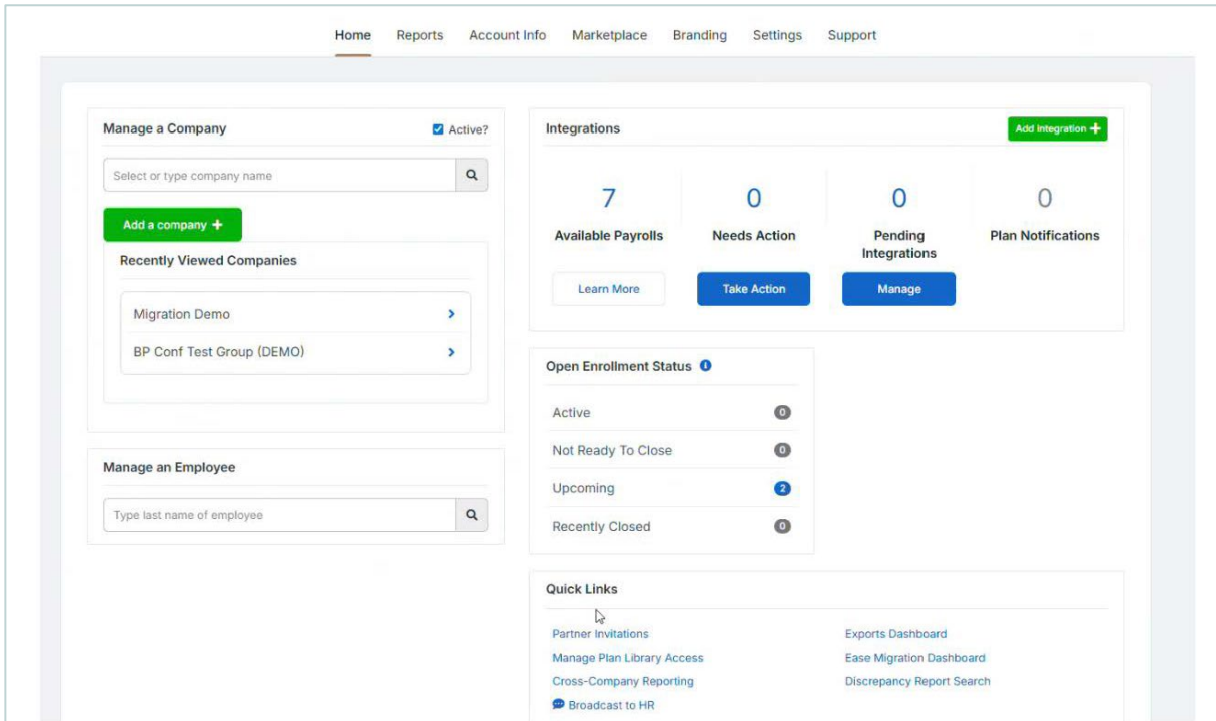
Company	Status	Employees	Plans	Readiness	Next Step	Result
Migration Demo	Migrated	1	3		View in EN	Migration Report



The screenshot shows the 'Company Profile' settings page for 'Migration Demo' in the EASE system. The navigation bar includes 'Home', 'Employees', 'Reports', 'Wall', 'ACA', 'PTO', 'Tasks', 'Benefits', 'Payroll', 'Documents', and 'Settings'. The left sidebar shows 'Company Setup' with options like 'Profile', 'Agency & Company Contacts', 'Class Structure', 'Payroll Groups', 'Carrier Group Structure', 'Subscriber Groups', 'HR User Access', 'HRIS Field Tracking', 'Assets', and 'Holiday Calendar'. The main content area shows the 'Company Profile' with fields for Client Status (Active), Defer Stats (checkbox), Is Demo Company (No), Company Name (Migration Demo), Company Identifier (MigDem2026), Tax ID, Address 1, Address 2, City, State (States, U.S. Territories, Canadian Provinces), and Zip. A 'Deactivate Company' button is visible in the top right.

Add B&P as Support Partner

- From broker home page Quick Link section, select Partner Invitations>Invite Partner



Questions?

Contact B&P's Online Enrollment team: onlineenrollment@beerepurves.com