

Assurity[®]

Enrollment Platform Program Guidelines



Assurity makes enrollments and benefits management easier for you and your employer clients by offering a best-in-class enrollment platform option **or** integration with a platform of your choosing.

Integrated data connectivity helps you and employer groups:



Simplify the benefits enrollment process



Streamline data exchange with carriers



More efficiently process new hires, status changes and terminations

BenSelect Enrollment Platform Offering

Assurity holds an enterprise license to the BenSelect (Selerix) enrollment and benefits administration platform and offers it for use by our brokers and their employer clients.

Assurity's current product portfolio is preconfigured to support:

- Easy plan setup with dynamic rate calculations and benefit descriptions for any benefit design
- All state disclosure requirements
- Electronic statement of health questions when needed
- A customized enrollment experience
- Automated data file setup

Eligibility

For employer groups new to Assurity:

Minimum number of eligible employees

10

Minimum number of Assurity products

1

Minimum expected participation per product

10%

Eligibility for existing Assurity employer groups will be determined on a case-by-case basis, considering group size, current participation level and number of Assurity products enrolled. Continued eligibility will be reviewed periodically using the same criteria.

Case Builds

Assurity will provide complimentary employer case build services on our license to the BenSelect platform. Employer case builds may also be completed on our license by any third party, broker-contracted resource holding an active support agreement with Selerix.

- Assurity's employer case build services include configuration of the employer and Assurity products only.
- Broker-contracted resources building on the Assurity license may complete employer and Assurity product configuration, with additional responsibility for the following:
 - Configurations of all non-Assurity products to be included in an employer group case.
 - Compliance with Assurity's Rules of the Road (available on the Payer Products tab in BenSelect).

Note: Any fees associated with build services on Assurity's license by broker-contracted resources are the responsibility of the broker.

Requests to use Assurity's license to BenSelect for an employer group should be made to the Business Transformation Team: businesstransformation@assurity.com

Other Enrollment Platforms

Assurity encourages use of its license to the BenSelect platform, but recognizes numerous platform solutions are in widespread use in the voluntary benefits market. We offer automated data connectivity and integration with the following platforms:

- Ease (via Ease Connect license)
- Employee Navigator (coming soon)

In addition, Assurity is both willing and able to accept and process data files coming from most any platform and method of enrollment. Advance communication with a member of our Business Transformation Team is key to streamlined file submission and timely processing.

Given Assurity's complimentary offering of the BenSelect platform, we do not typically participate in setup or ongoing fees associated with builds or enrollment of Assurity products on other platforms. However, for enrollments utilizing Assurity's current group product series, limited exception consideration will be given to setup cost participation, subject to the following minimum requirements:

| | |
|---|-----|
| Minimum number of eligible employees | 250 |
| Minimum number of Assurity products enrolled | 2 |
| Minimum per product participation | 10% |

Note: Payees must be platform or third-party builder; payees may not be the employer, broker, or broker-owned entity

Prior consideration and approval of any setup cost participation is required. Requests should be submitted in advance of group sale through the appropriate regional sales manager/regional sales coordinator.



Questions? Contact your Regional Sales Team: worksitesales@assurity.com



Why we're different

Mutual strength

For over 130 years, our financial strength has helped people support one another through difficult times.

A force for good

As a Certified B Corporation, we work toward positive impacts for employees, communities and the environment.



Personal service

Get the customer service you need from real, responsive and efficient people in our Lincoln, Nebraska headquarters.

Worksite Product Sales

800-276-7619
Ext. 8964

Find out more
[assurity.com](https://www.assurity.com)



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