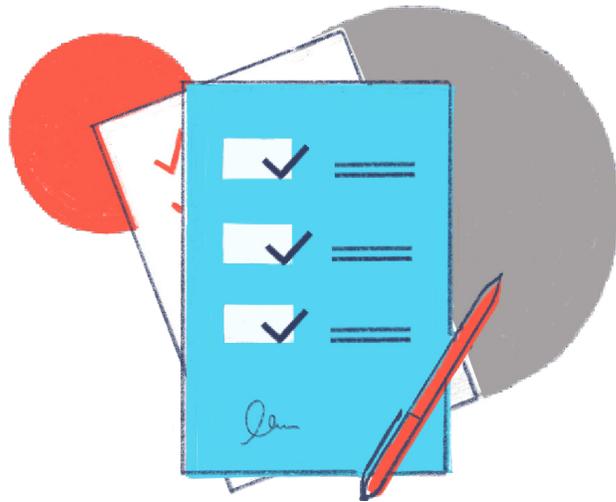


# What you should expect during a Zenefits implementation as the client's Broker



# Contents

<b>Roles and Responsibilities</b>	<b>4</b>
<b>Timeline &amp; Broker Commitment</b>	<b>5</b>
<b>FAQ's</b>	<b>6</b>





**We're excited to have you and your team join Zenefits! This document describes what you can expect during your client's Benefits Zenefits implementation, including:**

- Roles and Responsibilities
- Timelines and estimated Customer / Broker Commitment
- FAQ

# Roles and Responsibilities

## ✓ **Zenefits Implementation Manager**

- Your Zenefits implementation team will be a resource to help answer your benefits related questions while the benefits are built in Zenefits.
- The Zenefits Implementation team will build the **current** year's benefits or if there is one, the **initial** upcoming renewal into Zenefits.

## ✓ **The Client**

- The implementation is driven around client timelines and expectations. The client will begin their implementation by collecting vital information and documents. They will perform setup tasks and configuration tasks along the way. All phone calls will include the client.

## ✓ **Broker Partner**

- Depending on client preference, Zenefits will either work directly with the client or work with the broker partner to collect benefit documentation required to start implementation. The broker will be invited to any benefits related phone calls.
- The broker will be responsible for building all renewals following the initial benefits load.

# Timeline & Broker Commitment

## ✓ Document Collection

- The client and/or broker can review and provide Zenefits and/or the client with required benefits documentation, [found here](#).
- If a renewal is coming up, Zenefits will need a 60 day lead time to build the current benefits and allow time to train your team to build the renewal in Zenefits (Please see below in Account Completion and Training, and/or FAQ's for more information).
  - **Example:** 6/1 Effective date needs to be in Implementation by 4/1.

## ✓ Zenefits to build benefits

- Estimated time: 2-4 weeks depending on size of group and complexity

## ✓ Account Review

- When benefits are in Zenefits the broker will want to do a **thorough** Quality check of enrollments to ensure they are correct.
- Account Review should take no more than one full week following the completion of the benefits build

## ✓ Account Completion and Training

- Complete Broker Training with our Enablement team
  - No matter which package you choose, we have an onboarding [learning path](#) to get you up and running—standard or advanced.

# FAQ

## ✓ **How does FSA/HSA/COBRA/ACA work?**

- **FSA Resources** – Does your client have or want to manage their FSA on Zenefits? Learn more here: [Zenefits FSA Guide](#)
- **COBRA Resources** – Does your client have or want to manage COBRA on Zenefits? Learn more here: [CobraComplete Contact & Guide](#)
- **HSA Resources** – Does your client have or want to manage HSA on Zenefits? Learn more here: [HSA Resources & Avidia Contact Information](#)
- **ACA Resources** – Does your client have or want to manage ACA on Zenefits? Learn more here: [Zenefits ACA Guide & Configuration](#)
- **Supported Carriers + EDI** – Curious if your client is eligible for EDI? Check out our supported carriers and EDI mins here: <https://www.zenefits.com/carriers/>

## ✓ **Who can I contact during implementation?**

- The group's Implementation Manager
  - You will be added to the introduction email from the Implementation Manager

✓ **Who do I contact following implementation?**

- **Zenefits Support Team**

- Log into Zenefits account: <https://secure.zenefits.com/accounts/login/>
- Click the “Help” icon on the top right corner of your screen.
- Follow steps to ask your question or a question on the client or employee’s behalf.

- **Enablement Manager**

- The group’s Enablement Manager is introduced towards the end of Implementation, and dedicated to training on the Zenefits dashboard

- **Customer Executive**

- If company qualifies, the Customer Executive can always be reached after Implementation, and can assist in prioritizing any Support tickets when needed

✓ **Who do I contact for a systems training?**

- No matter which package you choose, we have an onboarding [learning path](#) to get you up and running—standard or advanced.
- The group’s Enablement Manager, who is introduced during Implementation to provide additional training and support.



**zenefits.com**

**Disclaimer:** The materials available in this publication, as well as use of, and access to, this publication or any of the emails, marketing materials, or derivative assets, are for informational purposes only and not for the purpose of providing legal advice. You should contact your attorney to obtain advice with respect to any particular issue or problem.

© 2020, YourPeople, Inc., d/b/a Zenefits.  
All rights reserved.