

# **Springboard Marketplace<sup>®</sup>**

## **online benefits system**

### **Broker user guide**

**for Small Group self-insured**

**Aetna Funding Advantage<sup>SM</sup> (AFA) products**

Desktop and Mobile URL: [springboardmarketplace.com](https://springboardmarketplace.com)

Revision date: 10/15/2017

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## Browser requirements

Springboard Marketplace supports the following browsers:

- Microsoft Internet Explorer, version 9.0 and up
- Mozilla Firefox, version 35.0 and up
- Safari, version 9.0 and up
- Google Chrome, version 39.0.2171.99m and up

We encourage you to keep your browser updated.

You must have the following enabled:

- Cookies
- JavaScript
- Style sheets

## Springboard™ log-in

1. To begin, visit [springboardmarketplace.com](http://springboardmarketplace.com) and log in by entering your username and password. First time users will click on the “First Time User” hyperlink. You’ll need to make sure you have your unique Producer World user name to register for access to Springboard Marketplace.

EN ESPAÑOL

Springboard Marketplace®

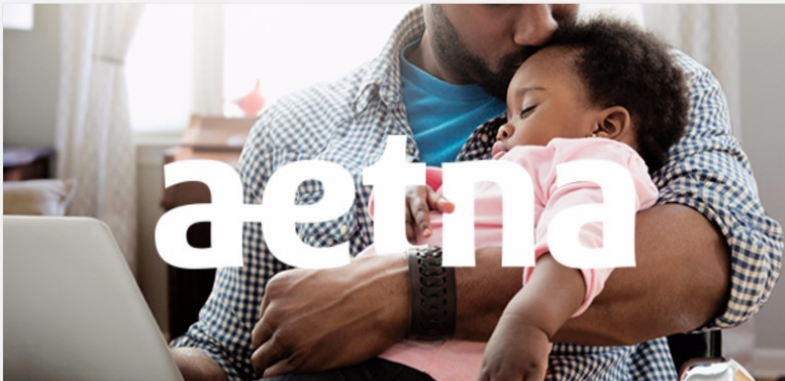
Log In

Username

Password

First Time User  
Forgot Password

Log In >



Need assistance?

Click the appropriate role below for assistance.

for Small Group Brokers

for Employees and HR Administrators

After initial log-in, you'll land on the **parent site** of the Springboard Marketplace platform. The parent site governs most of the administrative functions for Springboard. The **child site** is the actual employer group site where enrollments will take place. It allows employees to manage their information and choose their benefits. You will only see the employer group(s) you are aligned to within the Springboard Marketplace.

Please note: Springboard Marketplace will time out after 30 minutes of inactivity.

## Admin home page/broker tools

The admin home page is available at both the parent site and the child site. At the parent site level, you can search for your employer groups via the "Manage Groups and Membership" tab, manage quotes, and review alerts.

- **Manage groups and membership:** To review high-level information about a group, such as group number, group status, address information and employee count, enter the employer group name within the search box. Once you find the requested group, click on the name for more information. You can also use this section to navigate to the employer group site (child site) by selecting the "Navigate to Group" link.

**Manage Groups and Membership**

Select Client:

DEMO - Clermont Farmer's Market

[View All](#)

Manage Group

**DEMO - Clermont Farmer's Market**

Group Number	999875270
Status	Enrollment In Progress
Renewal Date	
Address	12 Main St Norcross, GA 30092
Employee Count	10

[Run a Report](#)

[Manage Users](#)

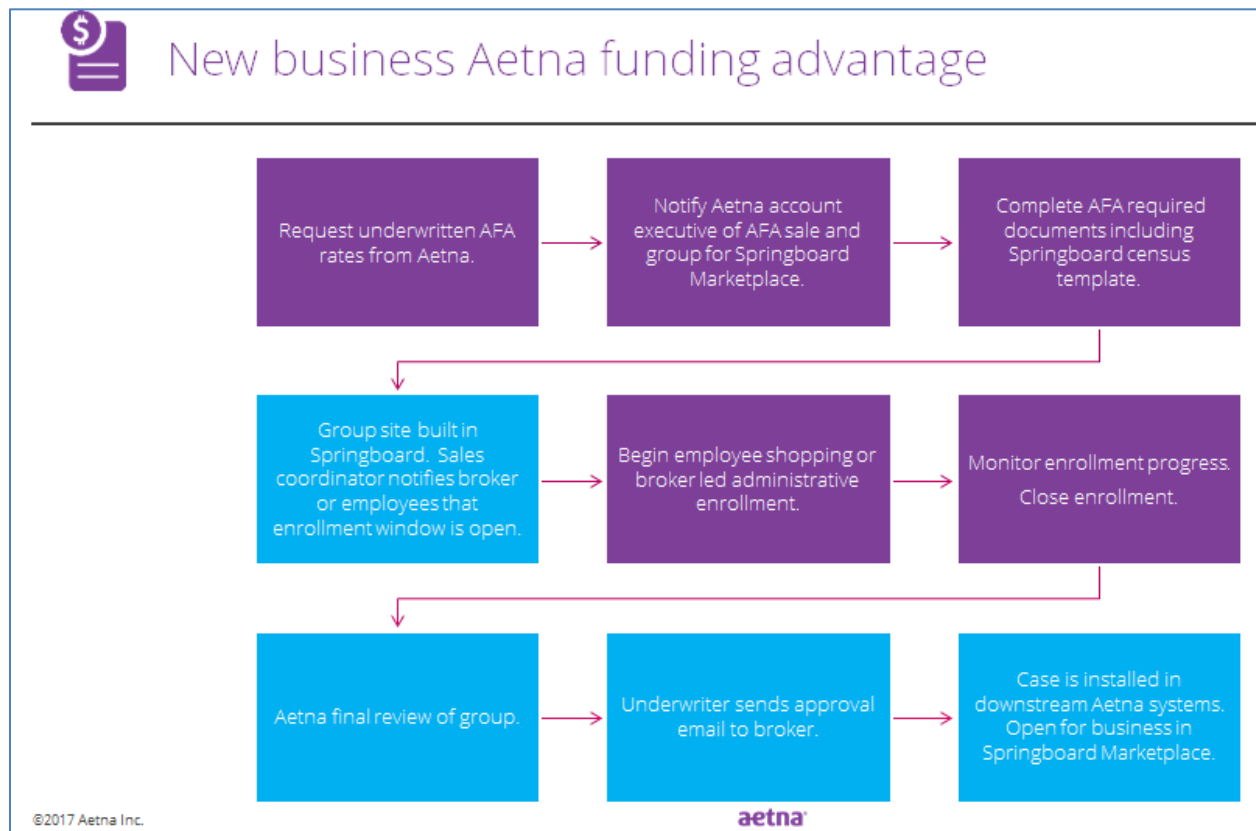
[Review Application](#)

[Navigate to Group](#)

- **Alerts:** The alerts tab shows the status of employer applications and employee enrollment. To review more information about an alert, choose the alert name.

Alerts	
New Applications Pending (Application In Progress)	>
Application Status (Application Pending Approval)	>
Application Status (Enrollment In Progress)	>
Application Status (Enrollment Complete - Pending Audit)	>

## Submitting a new group



Once you return all required applications and supporting documentation to the sales coordinator, we will review the information and set up the case in Springboard. The sales coordinator will then notify you that the group is ready for enrollment.

Case status will be “Enrollment in Progress”.

## Employee open enrollment

Once the group is in “Enrollment in Progress” status, employees will complete their enrollment through member shopping. Or the broker/HR administrator will complete it through administrative enrollment.

### Member shopping

This is our preferred method of employee open enrollment. If you select this option, the employees will receive an email notification once Springboard is set up and ready for shopping.

1. Employees will log in to Springboard and start their enrollment by accessing [springboardmarketplace.com](http://springboardmarketplace.com). (Employees will get their user name and initial password login in the email provided. If they misplace the email, employees may also select the “for Employees and HR Administrators” link listed below the “Need Assistance” heading. This will provide the employee with their user name logic as well as the initial password logic.)

Springboard Marketplace® EN ESPAÑOL

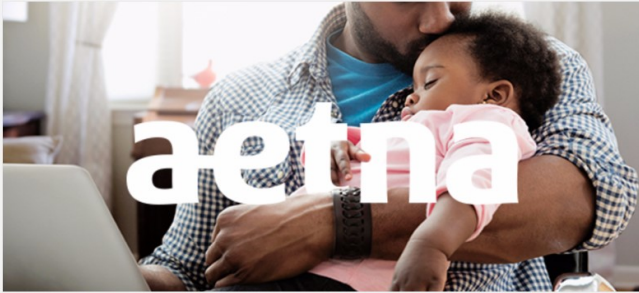
### Log In

Username

Password

[First Time User](#)  
[Forgot Password](#)

[Log In](#)



**Need assistance?**  
Click the appropriate role below for assistance.

[for Small Group Brokers](#)  
[for Employees and HR Administrators](#)

- After logging in, employees can start their enrollment by selecting “Start Your Enrollment”.

En Español [Preferences](#) [Change Password](#) [Log Out](#)

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[Home](#)
[My Benefits](#)
[My Profile](#)
[Library](#)


Welcome to your enrollment!

Enrollment Deadline: 10/26/2017

Your Status: Not Started

[Start Your Enrollment](#)





Welcome, Katy Perry

**My Profile**

[Edit my profile](#)  
[Edit dependent profiles](#)  
[Change my address](#)

**Life Events**

[Birth](#)  
[Marriage](#)  
[Civil Union](#)  
[All other Life Events](#)

**Start today with Apple Watch – for as low as \$25**

It's not about what you did yesterday. It's about what you do today. Whether it's crushing that to-do list or taking the stairs. Aetna wants to offer you an Apple Watch for as low as \$25 plus tax to help celebrate the wins, big or small.

[Shop now](#)

**Questions?**

Click the document below to download the most frequently asked questions.  
[Apple Watch FAQ](#)

**My Benefits**

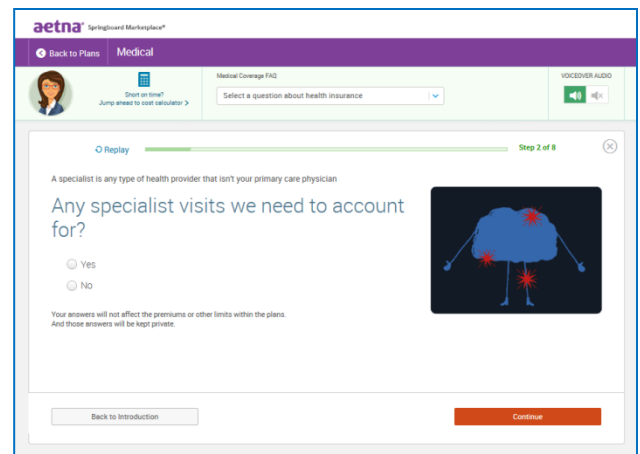
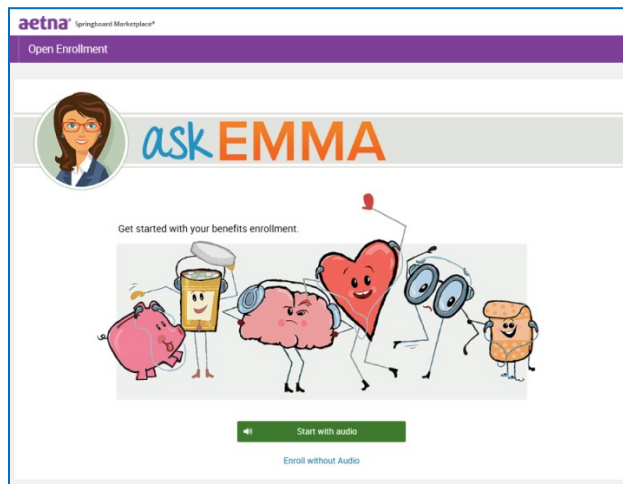
Effective Date: 9/14/2017

You have no active benefits as of 9/14/2017.

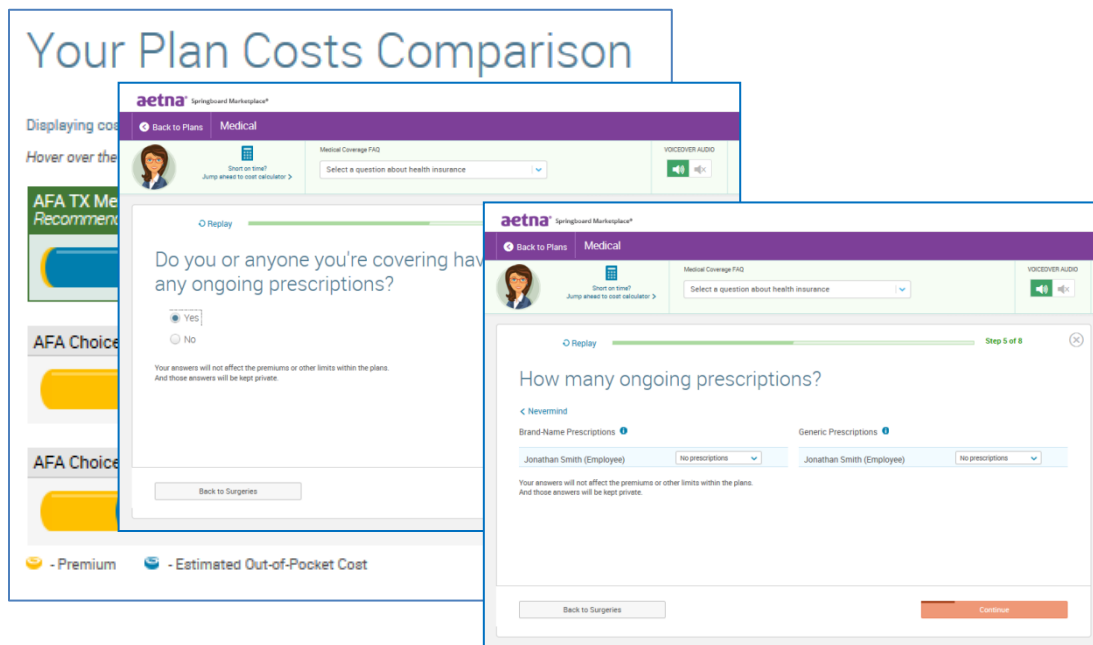
This shop now panel will not appear until the member elects an AFA medical plan. They will click the house on the menu bar to return to this page after they complete their enrollment.

- As long as the employee is enrolling in an AFA medical plan they are eligible to purchase an Apple Watch for as low as \$25 by clicking on the “Shop now” link. (Not eligible for waivers or dependents.)

4. Emma, our online benefit advisor, guides the employee through the enrollment process. Emma also helps determine the best plan option for the member based upon answers to a series of questions. The questions pertain to how they'll use their benefits while taking into account their monthly costs.



5. Emma will highlight her recommendation after the employee answers the health questions she presents.



6. Employees can then select a plan by choosing the "Select" button. (Emma's recommendation will be highlighted with a green box around the plan. But employees can select any of the plans offered by their employer.)



Forgot Something? [Edit My Answers](#) Medical Coverage FAQ Select a question about health insurance VOICEDOVER AUDIO

Who will be covered by this plan?  
☒ Janice Litman (Employee) [Add Dependents](#)  
[View All Plans Side-by-Side](#)

**AFA TX Memorial Hermann CPOSII 1500 100/70 CY**  
 Aetna POS  
 Deductible: Individual \$1,500 Family \$3,000 Out-of-Pocket Max: Individual \$4,000 Family \$8,000 CO-Insurance: 0% View plan details  
 Your Cost per month: \$0.00  
 Original Cost: \$276.67  
 Benefit/Block: \$276.67  
[Select](#)

**Provider Search**  
 Click here to search for a participating provider.

YOUR ANNUAL COSTS <a href="#">Explain this</a>	PREMIUM X 12 MONTHS	ESTIMATED ANNUAL OUT-OF-POCKET SPENDING	YOUR ESTIMATED ANNUAL TOTAL COST	IN-NETWORK MAXIMUM COST
	\$0	\$3,300	\$3,300	\$4,000

Based on your answers, we recommend this plan. [What?](#)

**AFA Choice POS II 2000 HSA 100/80 CY**  
 Aetna HSA POS  
 Deductible: Individual \$2,000 Family \$4,000 Out-of-Pocket Max: Individual \$3,275 Family \$6,550 CO-Insurance: 0% View plan details  
 Your Cost per month: \$83.91  
 Original Cost: \$93.58  
 Benefit/Block: \$276.67  
[Select](#)

**Provider Search**  
 Click here to search for a participating provider.

YOUR ANNUAL COSTS <a href="#">Explain this</a>	PREMIUM X 12 MONTHS	ESTIMATED ANNUAL OUT-OF-POCKET SPENDING	YOUR ESTIMATED ANNUAL TOTAL COST	IN-NETWORK MAXIMUM COST
	\$1,006.92	\$3,275	\$4,281.92	\$4,281.92

**AFA Choice POS II 1500 100/70 CY**  
 Aetna POS  
 Deductible: Individual \$1,500 Family \$3,000 Out-of-Pocket Max: Individual \$4,000 Family \$8,000 CO-Insurance: 0% View plan details  
 Your Cost per month: \$163.25  
 Original Cost: \$442.92  
 Benefit/Block: \$276.67  
[Select](#)

**Provider Search**  
 Click here to search for a participating provider.

7. Then they confirm their selections and “Complete Enrollment”.

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**Review and Confirm**

**Please Review All of Your Selections**

Once you have completed your review, click the “Complete Enrollment” button at the right side of the page.

\*Indicates changed benefits

**Your Total Cost \$132.99 Per Month**

**Medical\*** Your cost per month **\$132.99**

**AFA TX Memorial Hermann CPOSII 1500 100/70 CY**  
 Aetna  
 Coverage: Employee

Who will be covered on this plan:

Name	Relationship	Coverage
Martin Truex	Employee	<input checked="" type="checkbox"/> Cover

[Medical](#)

**Cost Details Per Month**

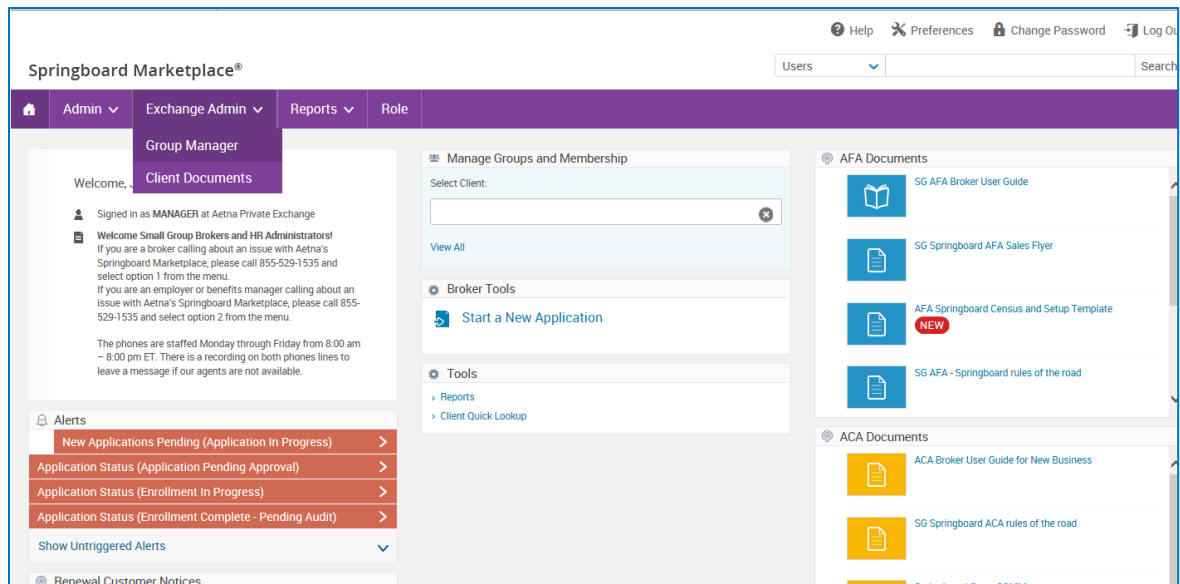
Total Premium	\$602.12
Employer Contribution	(\$469.13)
<b>Your Cost</b>	<b>\$132.99</b>

1 Your Info  
 2 Your Benefits  
 3 Enroll  
 Review and Confirm  
 4 Complete

**Complete Enrollment**

## Group quick admin enrollment

From the menu bar, hover over “Exchange Admin” and then select “Group Manager”.



Enter the name of the group and choose “Search.” Then, select the group’s hyperlink.

### Group Manager

Search for an Existing Employer Application or Add a New Employer Application

Group Name 
Group Number 
Application Status 
Employer Application

Exchange Effective Date 
Process

Group Name	Group Number	Saved By	Saved On	Status	Process	Effective Exchange Date
<a href="#">DEMO - Norcross Gym DBA George</a>	999874705	Mims, Dorothy	7/27/2017	Enrollment In Progress	Default	8/1/2017

Select “Continue Administrative Enrollment/End Enrollment”.

Group Name:  
**DEMO - Norcross Donuts DBA Franks**

**STATUS: Enrollment In Progress**

[> Review Application](#)  
[> Continue Administrative Enrollment/End Enrollment](#)

On this page, Springboard will show all employees (enrolling or waiving) and dependents listed on the original Springboard census. Coverage tier defaults to employee only, regardless of the tier listed on the census.

Expand All Collapse All		PREMIUM (PER MONTH)	
Employee	Allen, Barry ( age 30 , zip 30301 )	Manage Family Information	\$0.00
Medical	<input checked="" type="checkbox"/> Barry Allen Employee <input type="checkbox"/> Ivory Allen Spouse <input type="checkbox"/> Jade Allen Child	PLAN AFA Choice POS II 1000 100/70 CY	COVERAGE Employee \$0.00

This screen will also reflect any enrollments completed through administrative enrollment or by the employee through member shopping.

Employee	James, John ( age 59 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> John James Employee	PLAN Select Plan	COVERAGE -
Employee	Johnson, Dwayne ( age 38 , zip 30301 )	Manage Family Information	\$0.00
Medical	<input checked="" type="checkbox"/> Dwayne Johnson Employee	PLAN AFA Choice POS II 3500 80/60 CY	COVERAGE Employee \$0.00
Employee	Lee, Rhonda ( age 44 , zip 30301 )	Manage Family Information	\$1,535.76
Medical	<input checked="" type="checkbox"/> Rhonda Lee Employee <input checked="" type="checkbox"/> Robert Lee Spouse <input checked="" type="checkbox"/> Melissa Lee Child <input checked="" type="checkbox"/> Sarah Lee Child	PLAN AFA Choice POS II 1000 100/70 CY	COVERAGE Employee + Family \$1,535.76

To process enrollment, select the arrow on the “Plan” drop-down for the chosen employee and then choose the appropriate plan.

Expand All Collapse All		PREMIUM (PER MONTH)	
Employee	Allen, Barry ( age 30 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> Barry Allen Employee <input type="checkbox"/> Ivory Allen Spouse <input type="checkbox"/> Jade Allen Child	PLAN Select Plan	COVERAGE -
Employee	Gladstone, Joey ( age 29 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> Joey Gladstone Employee <input type="checkbox"/> Rebecca Gladstone Spouse <input type="checkbox"/> Alex Gladstone Child	PLAN Select Plan	COVERAGE -
Employee	Grant, Jackson ( age 25 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> Jackson Grant Employee	PLAN Select Plan	COVERAGE -

Coverage tier and monthly costs will update based on the selection. Monthly cost is the employee’s cost after defined contributions have been applied.

Expand All Collapse All

Employee Allen, Barry ( age 30 , zip 30301 ) Manage Family Information PREMIUM (PER MONTH) \$0.00

Medical ☒ Barry Allen Employee ☐ Ivory Allen Spouse ☐ Jade Allen Child PLAN AFA Choice POS II 1000 100/70 CY COVERAGE Employee \$0.00

To modify or review additional dependent demographic information, or to add dependents, select “Manage Family Information” next to the employee’s name. Unselect the green checkmark next to the dependent’s name if the dependent chooses not to enroll. Select the box next to each dependent to be enrolled.

Expand All Collapse All

Employee Allen, Barry ( age 30 , zip 30301 ) Manage Family Information PREMIUM (PER MONTH) \$1,535.76

Medical ☒ Barry Allen Employee ☒ Ivory Allen Spouse ☒ Jade Allen Child PLAN AFA Choice POS II 1000 100/70 CY COVERAGE Employee + Family \$1,535.76

If you need to add any dependents, select “Add Dependents”. Enter the required information.

Family Information

Barry Allen

Female Employee

30 years old (11/19/1986)

SSN: XXX-XX-6782

Ivory Allen

Male Spouse

31 years old (2/19/1986)

SSN: XXX-XX-6781

Edit >

Jade Allen

Male Child

6 years old (5/19/2011)

Edit >

+

Add Dependents

Return To Group Enrollment

Note: Correct employee Social Security numbers and street addresses are required during enrollment. If they were not supplied on the initial census, you will need to enter them by selecting the “Manage Employee Information” link.

## Ending employee enrollment

We will begin final review once all employee enrollments are complete and enrollment has ended.

1. You can monitor enrollment status of all employees by going to “Manage Groups and Membership” on your home page and selecting “Review Application”.

**Manage Groups and Membership**

Select Client:

Demo - Brawler Brewing

[View All](#)

---

**Manage Group**

Demo - Brawler Brewing

Group Number	999874271
Status	Enrollment In Progress
Renewal Date	
Address	321 Springboard Way Philadelphia, PA 19123
Employee Count	20

- > Run a Report
- > Manage Users
- > Review Application
- > Navigate to Group

2. Select the "Group Information" tab and then select "Continue Administrative Enrollment/End Enrollment".

Group Name:

DEMO - Norcross Donuts DBA Franks

Group Information   Application Information   Benefits Information   Billing Information

---

STATUS: Enrollment In Progress

- > Review Application
- > Continue Administrative Enrollment/End Enrollment

3. Confirm every employee has a plan selection or shows waived coverage.

Employee	Medical	PLAN	COVERAGE
Seaworth, Davos (age 44, zip 77024)	<input checked="" type="checkbox"/> Davos Seaworth Employee	Select Plan	-
Snow, Jon (age 29, zip 77024)	<input checked="" type="checkbox"/> Jon Snow Employee	AFA TX Memorial Hermann CPOSII 1500 100/70	\$0.00
Stark, Arya (age 27, zip 77024)	<input checked="" type="checkbox"/> Arya Stark Employee	Select Plan	-

- Once you've verified enrollment, and every employee has a plan selection or shows waived coverage, end enrollment by selecting "Submit Enrollment".

- This sends a notification back to Aetna for final review and approval. At this time the group will move to "Enrollment Complete – Pending Audit" status.

## Finding a specific group

If you want to review group level information, such as employee enrollment information, adding a new hire, or updating employee address information, simply go to the employer group site.

- To locate and review a specific employer group, from the Springboard Marketplace home page, enter the group name or group number in the search box under "Manage Groups and Membership".

### Manage Groups and Membership

Select Client:

[View All](#)

- Select "Navigate to Group" to access the group site.

**Manage Groups and Membership**

Select Client:

DEMO - ABC Corporation

[View All](#)

---

**Manage Group**

DEMO - ABC Corporation

Group Number	er81746
Status	Active In Exchange
Renewal Date	Jan 01, 2018
Address	12 Main Street Norcross, GA 30092
Employee Count	30

[> Run a Report](#)  
[> Manage Users](#)  
[> Review Application](#)  
[> Navigate to Group](#)

## Searching for an employee

Often you'll need to find employees in the system to reset their log-in information, update their enrollment information or change their address. This tool gives you two ways to find an employee. Please note, both of these options can be processed at the Springboard Marketplace home page (after initial log-in) or at the employer group site. If you are currently at the Springboard site, you do not need to go to the group site first to search for the employee. If you are already at the group site, you can simply search for the employee at the group level.

### 1. User search bar option:

- To confirm you're at the Springboard Marketplace **parent site** or the employer group site (**child site**) from the home page, use the "Signed in as Manager" status below the user search bar.

<p>Welcome, John</p> <p><b>Parent Site</b></p> <p>Signed in as <b>MANAGER</b> at Aetna Private Exchange</p> <p><b>Welcome Small Group Brokers and HR Administrators!</b> If you are a broker calling about an issue with Aetna's Springboard Marketplace, please call 855-529-1535 and select option 1 from the menu.</p>	<p>Welcome, John</p> <p><b>Child Site</b></p> <p>Signed in as <b>MANAGER</b> at DEMO - ABC Corporation</p> <p><a href="#">View Current Bill</a></p> <p><b>Welcome Small Group Brokers and HR Administrators!</b> If you are a broker calling about an issue with Aetna's Springboard Marketplace, please call 855-529-1535 and select option 1 from the menu.</p>
---	---

- From the home page, enter the first and last name of the employee in the upper right-hand corner search bar. (Be sure drop-down menu shows "Users".)

Help Preferences Change Password Log Out

Users Carrie Smith Search

Carrie Smith DEMO - Texas Bike a...

- c. A pop-up window will appear with a brief overview of the employee's information. Select any of the options below to go directly to that page within the employee's profile. Or choose "View User Information".

Carrie Smith

Client Name	DEMO - Texas Bike and Hike LLC
User Name	CSmith1024
Login Status	Enabled
Enrollment Status	Birth
Employment Status	Active
Benefit Class	Employee
Hire Date	Jan 01, 2000

- View Family Information
- Reset Password
- View Benefit Coverages
- View Employee File
- View User Information
- Add New Life Event
- Impersonate User

## 2. User admin option:

- From the home page, select Admin > User Admin from the Navigation tool bar
- In the search box, enter any of the following information:
  - Last name
  - First name

You can also submit a blank search by not typing anything in the search box and instead just selecting "Search".

- If searching for the employee at the Springboard Marketplace parent site, be sure to check the option "Include Users of Child Sites".



Springboard Marketplace®

Users [v] Search

Admin Exchange Admin Reports Role

AETNA PRIVATE EXCHANGE MANAGER

Search for User

### User Administration

Enter part or all of a user's First Name, Last Name, Employee ID, Import ID or SSN\* in the search field below. The system will search all records and return those that contain the entered search criteria.

Use Advanced Search if you want to filter your search results.

\* Your ability to search by SSN will be impacted by SSN masking &/or your assigned permissions.

Search for an Existing User

Search Blair Dibble

Include Users of Child Clients ☒

Advanced Search

Search Reset Fields

d. Select the employee's last name in blue font to be directed to the employee's profile.

Springboard Marketplace®

Users [v] Search

Admin Exchange Admin Reports Role

AETNA PRIVATE EXCHANGE MANAGER

Search for User

### User Administration

Enter part or all of a user's First Name, Last Name, Employee ID, Import ID or SSN\* in the search field below. The system will search all records and return those that contain the entered search criteria.

Use Advanced Search if you want to filter your search results.

\* Your ability to search by SSN will be impacted by SSN masking &/or your assigned permissions.

Search for an Existing User

Search Blair Dibble

Include Users of Child Clients ☒

Advanced Search

Search Reset Fields

Last Name	First Name	MI	SSN	Employee ID	Employment Status	Benefit Class	Import ID
Dibble	Blair		391-82-2545		Active	Employee	

## Resetting an employee password

If an employee forgets their password and is locked out of the Springboard Marketplace tool, follow the steps below to reset the password.

1. Search for the employee by following the instructions in [Searching for an Employee](#).
2. If locked out of the system, the **Log-in Enabled** field on the **View/Edit** page will be set to **No** under the **Log-in Information** section. If the employee has attempted to log in but has not yet been locked out, a **-1** or **-2** will be next to **Log-in Enabled**. This means they have unsuccessfully tried to log in once or twice. Note: Users get three log-in attempts until the system locks them out.
3. Select "Edit" next to **Log-in Information**.

Login Information

Login Enabled Yes

Effective Date

End Date

Username SSam1258

Entry Point Aetna Private Exchange

Edit

4. From the Log-in Information page:
  - a. **Log-in Enabled** should be Yes

Login Information

Demographics Employment Benefits

Susan Aikens > Edit Login Information

\* Login Enabled ☒ Yes ☐ No

- b. **Reset Password:** Choose one of the following options to reset the password
    - i. **Reset Password to the default password:** Date of birth (after selecting “Save”, the password immediately resets)

\* Username SAikens102112

Reset Password ☐ Do Not Reset

☒ Reset the user's password to Date of Birth in MMDDYYYY format. (For example, a user with Date of Birth of 3/12/1988 will get 03121988 for the new password)

☐ Reset Password via email to employee mimmsd@aetna.com

☐ Reset Password via SMS to employee

- ii. **Reset password via email to employee:** If the password is reset via email, from the drop-down menu select the email address to which the password reset link will be sent. Once the employee receives and selects the link, they will be asked to enter the last four digits of their Social Security number. The employee will have three chances before being locked out of the password reset process. If they enter the correct four digits, they can enter and confirm a new password.
    - iii. **Reset password via SMS to employee:** If the password is reset via the SMS authentication option, the employee will receive a six-digit SMS validation code. They will need to enter it after choosing the “Forgot Password” link on the log-in page. Passcodes can only be used once before becoming invalid. If the correct

passcode is entered before it expires, the employee will be asked to enter the last four digits of their Social Security number. The employee will have three chances before being frozen out of the password reset process.

- c. Choose “Save”.

## Adding an employee post-sale

If an employee needs to be added to the system after the initial application process (for example, a new hire) you can add them to the group site via user admin. (Adding any employees retroactive to the original effective date requires Aetna approval. Review [employee/dependent retro add policy.](#))

1. To add a user, from the group site, choose Admin >> User Admin and select “Add User” from either the left-hand navigation tool bar or from the search box.

The screenshot displays the Aetna Springboard Marketplace interface. At the top, there's a navigation bar with links for Help, Preferences, Change Password, and Log Out. Below this is a purple header with 'aetna Springboard Marketplace' and a 'Users' dropdown menu. The main navigation bar includes 'Admin', 'Exchange Admin', 'Reports', 'Library', and 'Role'. On the left sidebar, under 'MANAGER', there are links for 'Search for User' and 'Add User' (highlighted with a red box). The main content area is titled 'User Administration' and contains instructions on how to search for users. It includes a search field, an 'Advanced Search' link, and an 'Add a New User' button (highlighted with a red box).

2. Once on the “Add a New User” page, complete all necessary fields.
  - a. Fields marked with an asterisk are required.
3. After you’ve completed the “Add a New User” page, select “Save” to continue to the “Family Information” page.
  - a. If the family information is available, you may add the dependents to the system as well. Otherwise, the member will have the option to add their family members during their enrollment.
  - b. To add dependents, select the “Add Dependents” link and complete all required fields. Repeat for each dependent.

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Users [dropdown] Search

Admin Exchange Admin Reports Library Role

DEMO - ABC CORPORATION  
MANAGER

Bill Simpson  
Male Employee  
35 years old (9/9/1982)  
SSN: XXX-XX-6566

**Add Dependents**

Next

- After adding the employee and dependent demographic information there are two ways to enroll the employee into benefits. See two options below.

## Member shopping

- Provide employee with their Springboard Marketplace username and instruct them to enroll in benefits by going to [springboardmarketplace.com](https://springboardmarketplace.com).

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Users [dropdown] Search

Admin Exchange Admin Reports Library Role

DEMO - TEXAS BIKE AND HIKE  
LLC  
MANAGER

Search for User  
Add User  
Impersonate User  
**View/Edit**

Life Events  
Employee File  
Family Information  
Benefit Coverages  
SSO/Webservice Log

Terminate Employment  
Activate COBRA  
Re-Hire Employee

Demographics Employment Benefits

**John Doe**

**Demographic Information** [Edit]

First Name John  
Middle Initial  
Last Name Doe  
Social Security Number xxx-xx-3765  
Date of Birth 10/12/1923  
Age 93  
Gender Male  
Import User ID  
Tester User No

**Login Information** [Edit]

Login Enabled Yes  
Effective Date  
End Date  
**Username JDoe1012**  
Entry Point Aetna Private Exchange

**Address Information** [Edit]

Address 1 1235 Employee St

Go [here](#) to review member shopping.

## Impersonating a user

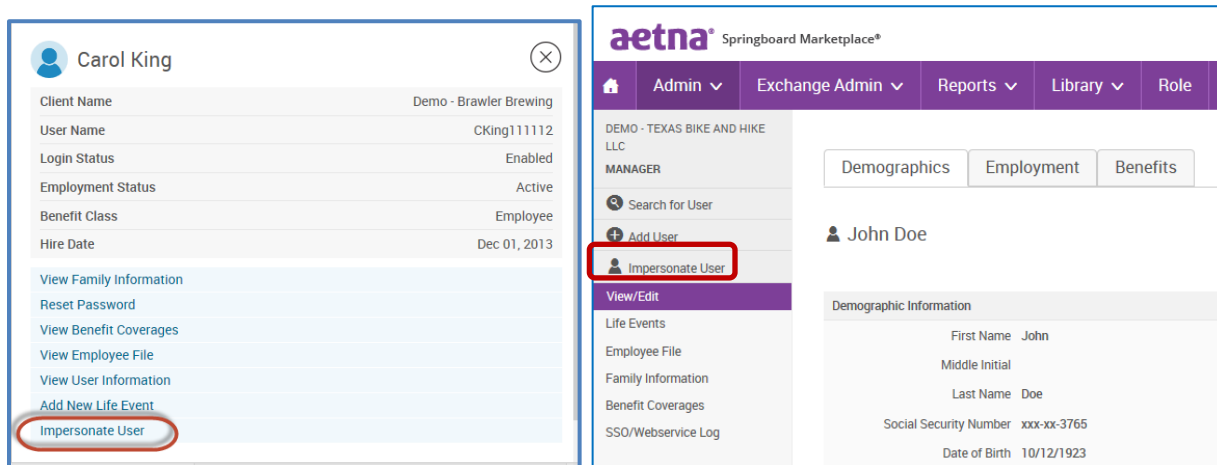
“Impersonate User” allows you to view the system through the eyes of the employee. The most common reason for this function is to process an enrollment on behalf of employees when they cannot access the system.

**Important note:** You or the HR administrator **must obtain a copy of the signed paper enrollment form** from the employee being impersonated. The information entered into the system should match the information entered onto the paper form by the employee. **You or the HR administrator must retain**

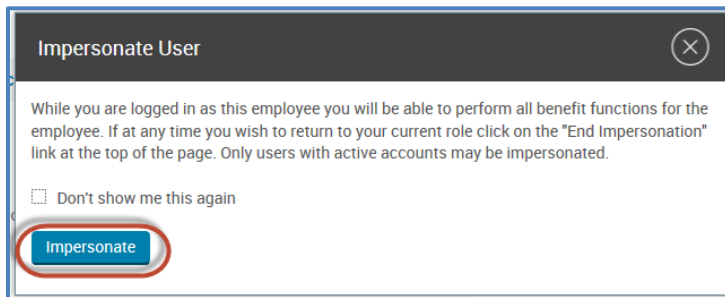
the signed enrollment form and final Springboard confirmation form for seven years. And you must provide it to Aetna upon request.

To impersonate:

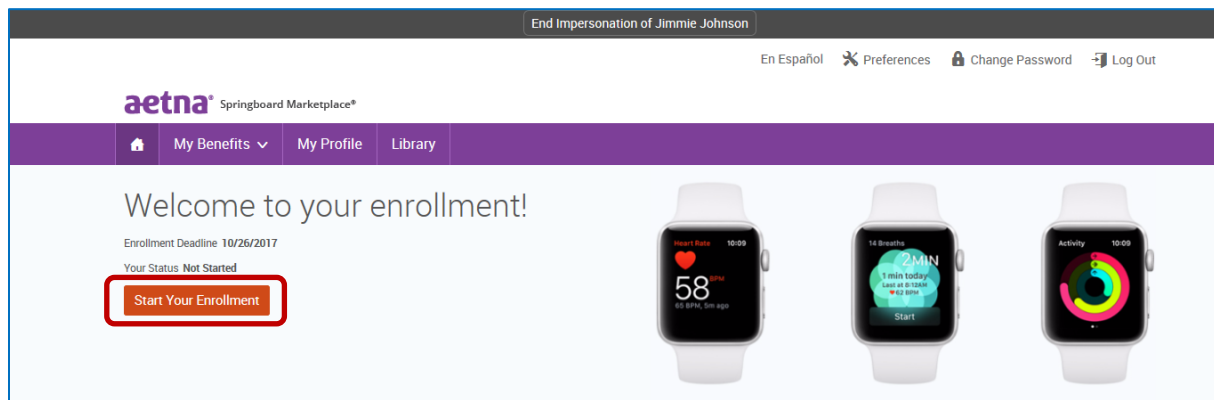
1. Locate the employee within the Springboard Marketplace tool. (See section: [Searching for an Employee.](#))
2. Select the “Impersonate User” link either from the search pop-up menu or from the employee’s profile.



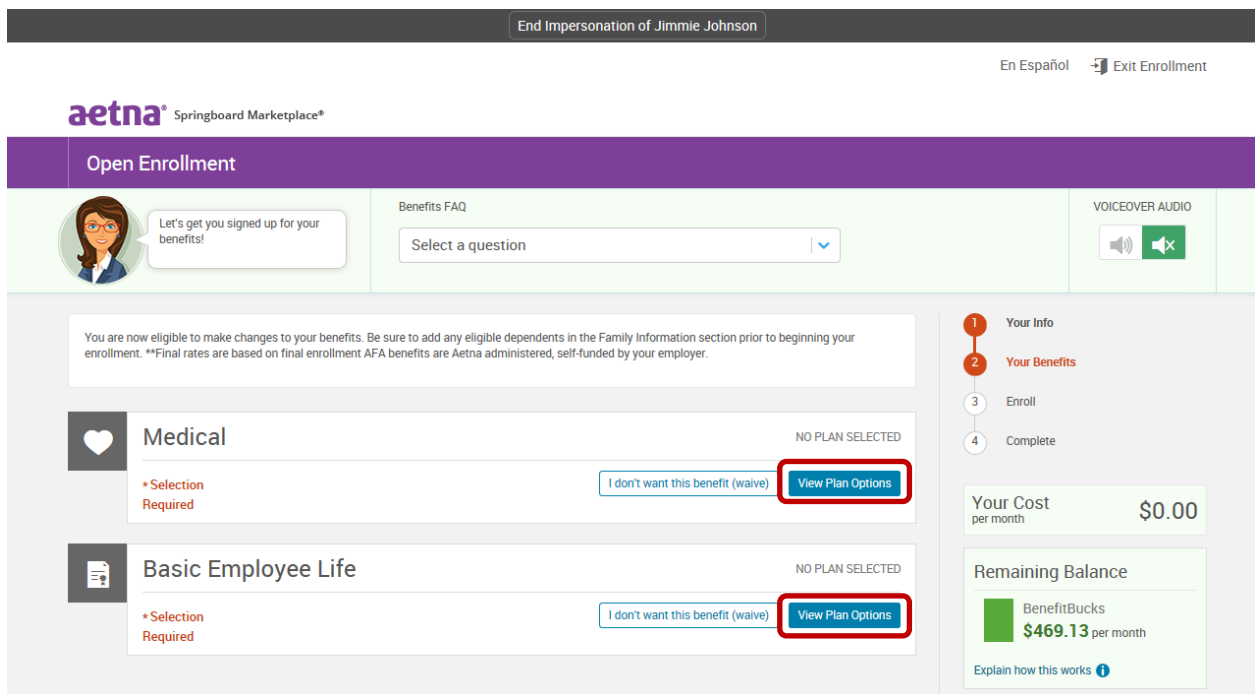
3. Choose “Impersonate”.



4. Select the “Start Your Enrollment” button at the top of the employee home page.



5. You'll be asked to confirm the member's demographic information is correct. Then you'll need to confirm the family dependent information.
6. Our online benefit advisor, Ask Emma, will start the enrollment introduction. Select "Let's Go" or "Enroll without Audio" to continue.
7. To enroll for benefits per benefits plan type, select the "View Plan Options" button on the right-hand side. This will expand the section and show all the plans offered.



8. After selecting the "View Plan Options" button, you'll be directed to confirm who the plan will cover. You can add dependents during this time.

End Impersonation of Jimmie Johnson
En Español
Exit Enrollment

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Back to Benefits
Medical

Who will be covered by this plan?

☒ Jimmie Johnson  
Employee

Add Dependents

Back to Benefits
Continue

- Once you've added and confirmed who the plan should cover, select "Continue" to go to the "Plan Selection" page. Here you can see plan details and compare plans side by side. To enroll in the requested plan, select the "Select" button.

End Impersonation of Jimmie Johnson
En Español
Exit Enrollment

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Springboard Marketplace

Back to Benefits
Medical

Need Some Help?
Which Plan is Best for Me?
Medical Coverage FAQ
Select a question about health insurance
VOICEROVER AUDIO

Who will be covered by this plan?

☒ Jimmie Johnson (Employee)

Add Dependents

View All Plans Side-by-Side

This benefit is eligible for up to \$469.13 in Benefitsbucks

AFA Choice POS II 2000 100/70 CY
Aetna POS
Your Cost per month: \$144.51
Tier: Employee

DEDUCTIBLE: Individual: \$2,000 Family: \$4,000
OUT-OF-POCKET MAX: Individual: \$4,500 Family: \$9,000
CO-INSURANCE: 0%
View plan details

Benefitsbucks \$469.13

Select

Provider Search
Click here to search for a participating provider.

EXPLAIN THESE COSTS

MINIMUM TOTAL COST \$1,734.12 (Premiums 12 Months)
YOUR ESTIMATED TOTAL COST Is This My Best Choice?
IN-NETWORK MAXIMUM TOTAL COST \$6,234.12 (Annual Premiums + Out-of-Pocket Max)

AFA Choice POS II 2000 HSA 100/80 CY
Aetna HSA POS
Your Cost per month: \$52.12
Tier: Employee

DEDUCTIBLE: Individual: \$2,000 Family: \$4,000
OUT-OF-POCKET MAX: Individual: \$3,275 Family: \$6,550
CO-INSURANCE: 0%
View plan details

Benefitsbucks \$469.13

Select

Provider Search
Click here to search for a participating provider.

EXPLAIN THESE COSTS

MINIMUM TOTAL COST \$625.44 (Premiums 12 Months)
YOUR ESTIMATED TOTAL COST Is This My Best Choice?
IN-NETWORK MAXIMUM TOTAL COST \$3,900.44 (Annual Premiums + Out-of-Pocket Max)

AFA TX Memorial Hermann CPOSII 1500 100/70 CY
Aetna POS
Your Cost per month: \$132.99
Tier: Employee

10. Repeat these steps for the remaining benefits plan types. Once you've made the enrollment selections, select the "Continue" button on the right-hand side of the screen.

The screenshot shows the Aetna Springboard Marketplace interface for an employee named Jimmie Johnson. The page is titled "Open Enrollment" and features a purple header bar. A sidebar on the right contains a progress indicator with four steps: 1. Your Info, 2. Your Benefits (highlighted in red), 3. Enroll, and 4. Complete. The main content area displays the "Medical" plan selection. The plan is "AFA Choice POS II 2000 HSA 100/80 CY" with a cost of \$52.12 per month. The coverage is for "Employee" (Jimmie Johnson) and is marked as "Completed". Below this, the "Basic Employee Life" plan is shown as "WAIVED" and also marked as "Completed". At the bottom right, a red-bordered "Continue" button is highlighted, with a "Save and Finish Later" button below it. The page also includes a "Benefits FAQ" section and a "VOICEOVER AUDIO" button.

11. This will bring you to the bottom of the page, where you need to confirm the elections and agree to the participation statement. Select "I agree, and I'm finished with my enrollment" on the bottom of the screen and then the "Complete Enrollment" button on the right-hand side.



End Impersonation of Jimmie Johnson | En Español | Exit Enrollment

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Review and Confirm

**Please Review All of Your Selections**

Once you have completed your review, click the "Complete Enrollment" button at the right side of the page.

\*Indicates changed benefits

**Your Total Cost** **\$52.12** **Per Month**

**Complete Enrollment**

**Medical\***

Your cost per month: **\$52.12**

AFA Choice POS II 2000 HSA 100/80 CY Aetna

Coverage Employee

Who will be covered on this plan:

Name	Relationship	Coverage
Jimmie Johnson	Employee	Cover

Cost Details Per Month

Total Premium	\$631.25
Employer Contribution	(\$469.13)
Your Cost	\$52.12

**Basic Employee Life\***

Waived

**Once You've Reviewed All Your Selections:**

Participation

**Conditions of Enrollment**

I understand and agree that my employer's application will determine coverage and that there is no coverage unless and until both the eligible employee enrollment form and the employer application have been accepted and approved by Aetna. Even if this enrollment form is approved, any intentional and material misstatements or omissions that amount to fraud, or which would have affected the carrier's rating, offering or issuing of coverage impacted, may result in future claims being denied and the policy or my coverage under the policy being rescinded or re-evaluated, as of the effective date, for eligibility and rating purposes. Failure to disclose all health information encompassed by the questionnaire will be deemed to be material omissions for rating purposes.

I understand and agree that this enrollment form may be transmitted to Aetna or its agent by my employer or its agent. I authorize any physician, other healthcare professional, hospital or any other healthcare organization ("Provider"), including pharmacies and pharmacy network benefit managers to give Aetna or its agent information concerning the medical history, prescription utilization history, services or treatment provided to anyone listed on this Enrollment/Change Form, including those involving mental health, substance abuse and HIV/AIDS. I further authorize Aetna to use such information and to disclose such information to affiliates, Providers, payors, other insurers, third party administrators, vendors, consultants and governmental authorities with jurisdiction when necessary for my care or treatment, payment for services, the operation of my health plan, or to conduct related activities. I have discussed the terms of this authorization with my spouse and dependent(s) and I have obtained their consent to those terms. This authorization will remain valid for the term of the coverage and as long thereafter as allowed by law. I understand that I am entitled to receive a copy of this authorization upon request and that a photocopy is as valid as the original.

I certify that all information and statements furnished by me are true and complete to the best of my knowledge. I am duly authorized to execute this Statement of Health. I am employed by the employer on page 1 and working full time for this employer.

I understand that you are submitting this information in connection with, for the purpose of enrolling, information concerning any fact material thereto constitutes a fraudulent insurance act, which is a crime and subjects each person to criminal and civil penalties.

☐ I agree, and I'm finished with my enrollment

Language Assistance: Español | 中文 | Tiếng Việt | 한국어 | Tagalog | Pycckий | العربية | Kreyòl | Français | Polski | Português | Italiano | Deutsch | 日本語 | العربية | Other Languages...  
 Privacy Policy | Accessibility Services | Nondiscrimination Notice | Browser Requirements | Technology powered by bowtie

12. The confirmation page will appear, verifying the enrollment is complete. At this point, you can print or email a confirmation statement to the address on file for the employee to review and file for their records.

End Impersonation of Jimmie Johnson | En Español | Preferences | Change Password | Log Out

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My Benefits | My Profile | Library

**Your enrollment is complete!**

You may make changes to your elections until: **October 26, 2017**

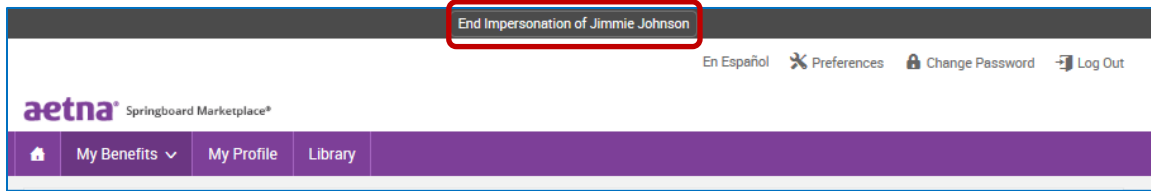
You are now eligible to make changes to your benefits. Be sure to add any eligible dependents in the Family Information section prior to beginning your enrollment. \*\*Final rates are based on final enrollment AFA benefits are Aetna administered, self-funded by your employer.

**Your Confirmation Statement is ready**

Your Confirmation Statement is an overview of your new benefits and costs for your review and records.

**VIEW** **EMAIL** **PRINT**

13. To end the impersonation, select "End Impersonation" at the top of the page. This will return you to the administrator view of the employee's record.



**Note:** If you or an HR administrator makes a change while impersonating an employee, that change will update the system. Your name or the HR administrator's name will be identified as the user who saved the record.

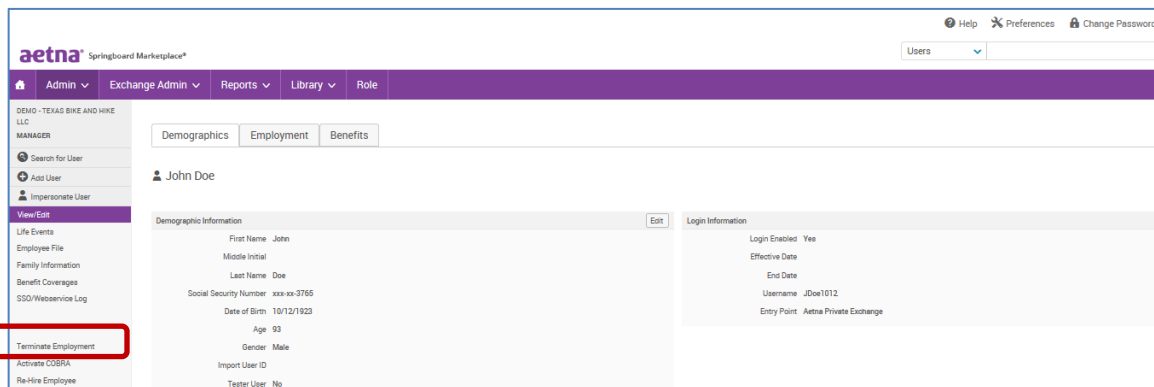
## Retroactive employee/dependent adds

Adding any employees or dependents after the group has been medically underwritten will require underwriting approval.

## Terminating an employee

When an employee is terminated from **employment**, you can process the termination by following the steps below:

1. Search for the employee (See [Searching for an Employee](#)).
2. From the View/Edit screen of the employee's profile, select the "Terminate Employment" link located within the left-hand navigation tool bar.



3. Once on the "Terminate Employment" page, enter the termination reason and date within the appropriate fields. Select "Save".

The screenshot shows the Aetna Springboard Marketplace interface. The top navigation bar includes 'Admin', 'Exchange Admin', 'Reports', 'Library', and 'Role'. The left sidebar lists various user management options: 'Search for User', 'Add User', 'Impersonate User', 'View/Edit', 'Life Events', 'Employee File', 'Family Information', 'Benefit Coverages', 'SSO/WebService Log', and a 'Terminate Employment' button at the bottom. The main content area is titled 'John Doe > Edit Employment Termination Information'. It features three tabs: 'Demographics', 'Employment', and 'Benefits'. The 'Employment' tab is active, showing a 'Termination Reason' dropdown menu and a 'Termination Date' input field with a date format hint '(mm/dd/yyyy)'. At the bottom of the form are 'Save' and 'Cancel' buttons.

4. A pop-up window will appear asking you to confirm the plans the employee is enrolled in and when the last day of coverage is. Once the information is confirmed, select “Save”.
5. The employee (and dependents if applicable) is now terminated from employment and coverage.

## Dependent terms

When a dependent is to be removed from coverage, you can process the dependent termination by following the steps below:

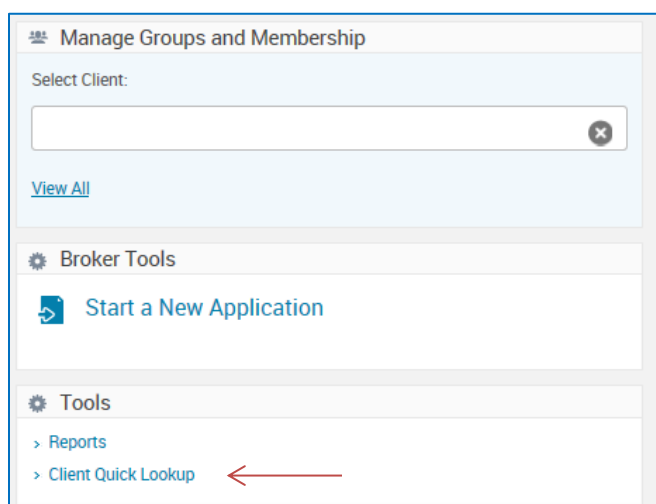
1. Search for the employee the dependent is enrolled under. (See [Searching for an Employee.](#))
2. On the left-hand side navigation menu, select “Life Events”.
3. Select “Other Life Events”.
4. On the drop-down select “other” once more.
5. Enter the date of qualifying event (date dependent is to be terminated).
6. Verify/acknowledge life event information is true and accurate.
7. Select “Save and Start Life Event Enrollment”.
8. Select “Got it, let’s get started”.
9. For each line of coverage enrolled select “View Plan Options”.
10. Uncheck dependent(s) who should no longer be covered under the plan.
11. Select “Continue”.
12. Select “Keep Selection” to retain current plan selection for the employee.
13. Continue.
14. Check “I agree” at bottom of page, then select “Complete enrollment”.

## Retro terms

You may process a retro term of an employee within Springboard as long as the termination of the employee was in the last 30 days. To process please review [Terminating an employee](#) section making sure you indicate a termination date within the last 30 days. If seeking an approval for special circumstances longer than 30 days, contact the Springboard Helpdesk for assistance. (Keep in mind last day of coverage will be the last day of the policy month.)

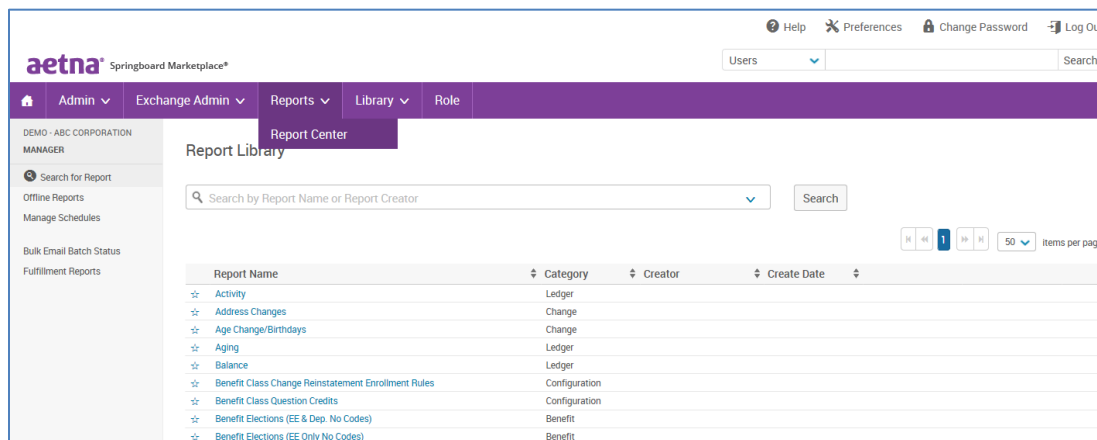
## Reporting

You can access reports via the “Client Quick Lookup” on the admin home page. Once you select the link, you can choose your client and the report you would like to run. The system will run the report and you can export it to Excel for editing, if necessary.



There are hundreds of reports available. This section includes an overview of common reports and their description.

To access the full reporting tool in Springboard, select “Reports”, then choose “Report Center”.



Each report has a standard data set that is automatically included when the report is selected. *Most* standard reports are configurable, meaning that fields can be added or removed prior to running the report. In addition, if there are reports that are run repeatedly, the templates can be saved for future access.

## Report output formats

- **Web:** If you select this option, the report will open in a new browser tab. Web reports can also be exported as Excel or CSV files. You can add more custom filters after the web report has been generated.
- **Excel:** If you select this option, you can open the report and save it as an Excel (.xls) file.
- **CSV:** If you select this option, you can open the report and save it as a comma separated values (.CSV) file.

To display information about the report's configuration on the report itself, check the **Include Report Header** option. On web reports, this will automatically expand the header panel at the top of the report. In Excel and CSV reports, report header info will appear at the top of the spreadsheet above the column headers. Report headers display the report's:

- Configuration, including the report's name
- Scope , or whether it's limited to certain clients
- Benefit plan types, vendors, benefit classes, etc.
- Types of users included
- Run date
- Effective and end dates

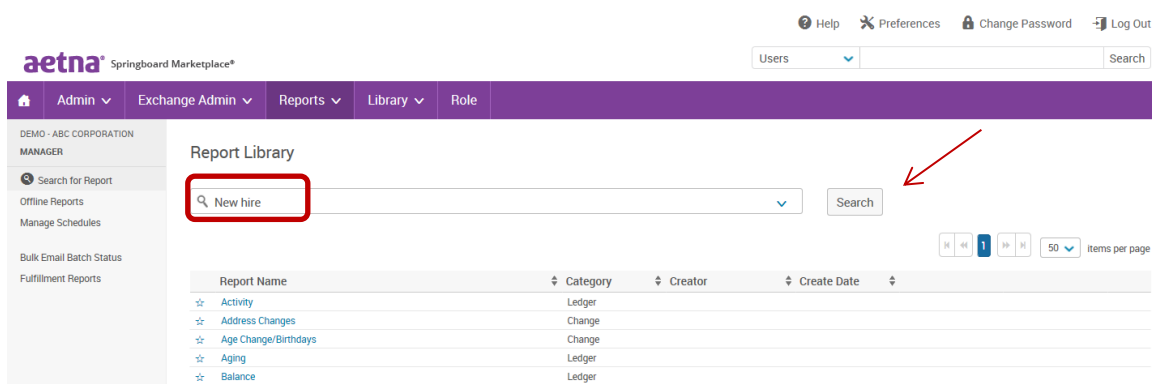
To run the report offline, check the **Run Offline** option. Choose this option to generate the report for retrieval from the "Offline Reports" page. Look under **Reports >> Report Center >> Offline Reports**.

As noted, you can save reports, making it easier to run customized reports on a recurring basis. You can schedule reports on a daily, weekly, monthly, or quarterly basis.

The recommended output format is Excel, but any of the options noted will provide output. Again, any reports that are output to Web can be exported from Web to either Excel or CSV.

## How to search for reports

From the landing page, you can search for reports by name or category. For example, if you're interested in reports for newly hired employees, you could search for the key words "new hire". The search results include the report category. Likewise, if you have saved reports configured to your preferences and that contain your name (for example, "Sue's Benefit Report"), you can search for "Sue" to pull up those reports.



### Tips!

- If there's a report you like to run on a regular basis you can easily select the star next to the name of the report and the next time you access the report center it will appear on the top of list.
- You can save a report you've customized so you won't have to edit it each time. (You can also "Star" your saved report for easy access.)

## Types of reports

- **Activity reports:** Activity reports provide information about log-ins that may help you contact employees during an enrollment period. You can use these reports during enrollment, along with enrollment reports, to monitor employees' progress.
- **Admin reports:** Administrative reports provide a snapshot of the data stored in an employee profile. For example, census reports and dependent listing reports are categorized as admin reports.
- **Benefit reports:** Benefit reports provide information about employee and/or dependent benefit overage, such as plan selection, cost and coverage effective dates and cost information.
- **Change reports:** Change reports detail changes to employee or dependent information, such as benefit class changes, beneficiary changes, changes to demographic information, and more.
- **Configuration reports:** Configuration reports provide information about a client's site, benefit plan, and enrollment rule structure. The reports allow you to quickly view information without having to go into the configuration pages to find out the settings. For example, a report showing plans assigned to benefit class is categorized as a configuration report.
- **Enrollment reports:** Enrollment reports show the completion status of enrollments where employees make their own elections. These reports can be used to identify and contact employees who have not completed their enrollment before the window closes. Or to view information about completed enrollments.
- **Pending reports:** Under certain scenarios, such as plans that need evidence of insurability (EOI), enrollments can be pending for HR admin approval before being officially posted on an

employee's record. Pending reports can be used when HR admins want to approve changes employees make to their personal information (e.g., last name, address, or banking information). Pending reports help HR admins monitor, approve, and reject pended information. When pending reports are used in web format, the HR admin can review all pended changes and approve or reject each change within the web output, without going into each employee record.

### Tip

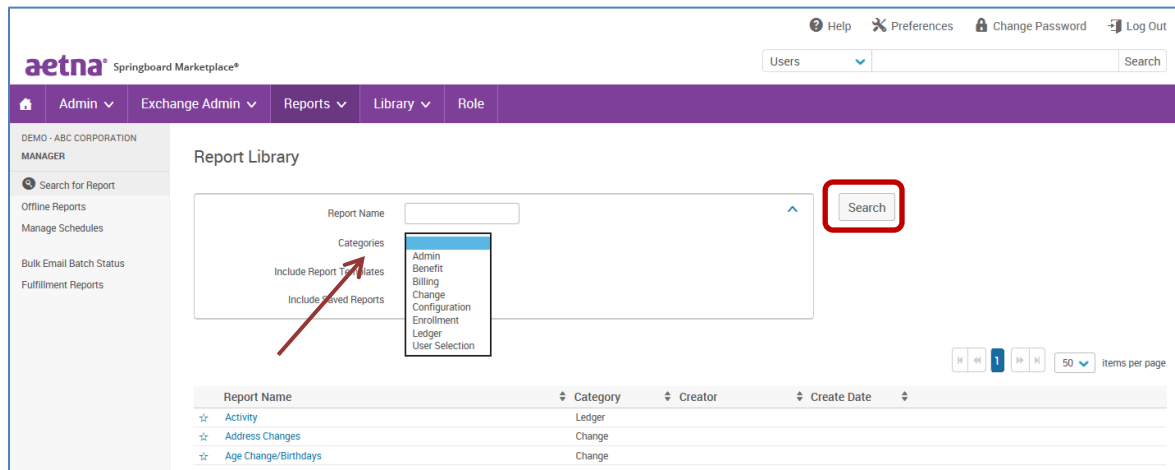
Specific instructions for accessing reports, along with some reports that may be useful, are outlined on the following pages.

## How to access reports

Log in to the Springboard site. Navigate to your group and select “Reports” from top navigation, then “Report Center”. To search for a specific category of reports, select the drop arrow at the end of the search bar.



You can select a report category or search on “Report Name”. If you’re searching for a saved report, be sure the “Include Saved Reports” option is checked. Choose “Search”.



This will display all benefit category reports.

[Help](#)
[Preferences](#)
[Change Password](#)
[Log Out](#)

Users

Search

[Admin](#)
[Exchange Admin](#)
[Reports](#)
[Library](#)
[Role](#)

DEMO - ABC CORPORATION  
 MANAGER

[Search for Report](#)  
[Offline Reports](#)  
[Manage Schedules](#)  
[Bulk Email Batch Status](#)  
[Fulfillment Reports](#)

Report Library

Report Name

Categories

☒ Include Report Templates
 ☒ Include Saved Reports

Search

1

50

Items per page

Report Name	Category	Creator	Create Date
☆ <a href="#">Benefit Elections (EE &amp; Dep. No Codes)</a>	Benefit		
☆ <a href="#">Benefit Elections (EE Only No Codes)</a>	Benefit		
☆ <a href="#">Benefit Questions</a>	Benefit		
☆ <a href="#">Overage Dependent Listing</a>	Benefit		
☆ <a href="#">Pre-Election Credit Questions</a>	Benefit		
☆ <a href="#">Terminations Report</a>	Benefit		
☆ <a href="#">Waive Coverage Detail</a>	Benefit		

Scroll down to select: **Benefit Elections (EE & Dep. No Codes)**. This is the report you'll pull to identify all of your enrollees.

The information outlined for the Benefit Report in this example applies for other types of reports. The exception is if a report is not configurable with respect to data items, you cannot customize the data output as shown in the first step of this section.



**aetna** Springboard Marketplace®

Admin Exchange Admin Reports Library Role

DEMO - ABC CORPORATION  
MANAGER

Search for Report  
Offline Reports  
Manage Schedules  
Bulk Email Batch Status  
Fulfillment Reports

## Benefit Reports

Select Report  
Report: Benefit Elections (EE & Dep. No Codes)▼

Select Fields to Include in Report

Demographics Employment Benefits Banking & Taxes HR

Selected Report Fields Up Down

☒ Demographics Info  
☐ Custom Dependent Fields  
☐ Custom Dependent Drop Downs  
☐ Address Info  
☐ School Info  
☐ Login Info  
☐ Misc  
☐ QMCSO Info

Employee ID  
Relationship (No Codes)  
Import User ID  
Group Number  
Last Name  
First Name  
Middle Initial  
Social Security Number  
Benefit Plan Type  
Benefit Plan Name  
Coverage Effective Date  
Coverage Termination Date  
Cost/Tier Effective Date  
Eligibility Response  
Eligibility Response Date

▼ Select Benefit Plan Types  
All Benefit Plan Types

▼ Select Vendors  
All Vendors

**Choose data items**

**This column shows all the fields that can be added to appear on your**

**This column shows all the fields that will appear on your report**

**The blue hyperlinks allow you to narrow your search by plan type, vendors, plans, etc.**

You can also customize the report by adding or removing fields. The report is defaulted to include a multitude of demographic and benefit fields, as well as the group number tied to each enrollment.

**Select Users**

☒ Users  
☐ Test Users

☒ Employee  
☒ Spouse  
☒ Domestic Partner  
☒ Child

☒ Active  
☐ Not Active  
☐ COBRA  
☐ Retiree

**Dates**

Effective Date:

**Filters**

Add Filter

**Report Output**

Select Output Type: ☒ Web  
☐ Excel  
☐ CSV  
☐ Bulk Email

Show Header ☐  
Run Offline ☐

Show on Admin Home Page  
☐ Show on Admin Home Page?

**Buttons:** Run, Save, Save As...

**Annotations:**

- The report defaults to include all relationships, active employees as of today's date, with web output.
- If you want a different effective date, or you want to include population(s) other than active employees, you may change those settings here.
- Recommended Output: Excel
- You can click the 'Run' button to run the report, or check 'Run Offline' so that you can navigate to other screens while the report runs.
- Checking 'Show Headers' will show the filtering selections you made in the top portion of the report output.
- If you have a report that you wish to run repeatedly, you can choose 'Save As...' to save.

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Language Assistance Español | 中文 | Tiếng Việt | 한국어 | Tagalog | Pycckий | العربية | Kreyòl | Français | Polski | Português | Italiano | Deutsch | 日本語 | العربية | Other Languages...

## Useful reports

- Benefit election reports:** Benefit Reports > Benefit Elections (EE & Dependent No Codes) or Benefit Elections (EE Only No Codes)
  - This report pulls a snapshot of the health and welfare plans in which the employees are enrolled, and can be run for employees and dependents or for employees only. Both reports always show coverage tier, but the EE & Dependent report will show rows for the individual dependents.
  - In the **Dates** field, make sure to select a date that is on or after the group's benefit effective date.
- Census reports:** Admin Reports > Census (EE Only) or Census (EE & Dependent)
  - This report produces a list of all employees listed under the group, regardless of whether they're enrolled in coverage.
- Enrollment changes:** Change Reports > Enrollment Changes (EE Only) or Enrollment Changes (EE and Dep)
  - This report shows enrollment changes that occurred within a specific time frame, defined when the report is run. Changes include but are not limited to new hires, life events, benefit election changes, terminations, COBRA changes, etc.
- Open enrollment status reports:** Enrollment Reports > Open Enrollment Complete and Open Enrollment Not Complete
  - This report pulls employees who have or have not completed enrollment.

5. **COBRA QE changes:** Change Reports > COBRA QE Changes
  - This report identifies recently terminated employees who may be eligible for COBRA coverage.
  - Note:** *The information captured in this report is based on what was entered at termination. Please refer to the employer's COBRA administrator for rules and regulations.*
6. **Rate/costs reports:** Configuration Reports > Rate Bands by Tier
  - This report pulls rates for non-tiered, volume-based plans (life, STD, LTD, AD&D, etc.).
7. **Activity/log-in info reports:** Reports > Activity Reports > Log-in Status
  - This report pulls all employees at each group with their user name and if their log-in is currently enabled or disabled.

Information regarding additional reports is listed below including where the report should be run, a brief description and other useful information.

Report type	Report name	Run at parent (P) or child (C)?	Description	Comment
Activity	eList	P/C	Custom report created to list all answers provided by the employer sponsor/broker regarding the employee census.	Custom report created to list all answers provided by the employer sponsor/broker regarding the employee census.
Admin	Newly Added Dependents	P/C	Generates a list of newly added dependents at employer sponsor sites. This report will display dependents added regardless of enrollment status.	Run this report when you need to see any newly added dependents within a date range, which you input when you run the report.
Admin	Newly Added Employees	P/C	Generates a list of newly added employees at employer sponsor sites. This report will display employees added regardless of enrollment status.	Run this report when you need to see any newly added employees within a date range, which you input when you run the report.

Admin	ExchangeSolutions Client Data	P	Data retrieved from employer application questions.	Pull this report when you need to see information about each client, including the template the client is aligned to, effective date, renewal date, new hire waiting period, and contact information.
Admin	Pre-Quote Client Data	P	Generates a list of quotes created by brokers and answers to each pre-quote question.	Use this report to see quotes created, including answers to each pre-quote question, including quotes that never became applications.
Admin	Census (EE Only) & (EE & Dep)	P/C	Lists all users in the system, including but not limited to brokers, employees, and administrators. This report can be customized to include details such as demographic and address information.	Run this report to pull census data as of a fixed point in time - you choose the "as of" date when you run the report.
Benefit	Benefit Elections (EE Only) & (EE + Dep)	P/C	A detailed and customizable report on enrollment information by employee and dependents. This includes but is not limited to demographic, benefit, enrollment, and address information.	Use this report when you need to see either employee (EE Only) or both employee and dependent (EE + Dep) information. The report shows individuals separately, per row.
Benefit	Overage Dependent Listing	P/C	Lists all dependents that are over the age of the maximum dependent age set by plan rules. The maximum dependent age can be different by plan and the overage flag is triggered accordingly.	This report looks at the maximum age, by plan, as configured in the system.
Benefit	Terminations Report	P/C	Lists employees who are terminated by employer sponsor site.	Terminations list by date range, as entered when report is run ("from" and "to")
Benefit	Waive Coverage Detail	P/C	Lists all employees who waived coverage.	Report returns data as of the effective date input at the time the report is run.

Benefit	Benefit Questions	P/C	A listing by employee of answers to benefit plan questions during enrollment. This is only triggered by plans configured to ask questions.	Pull this report to review answers to dental questions during the enrollment. This is only triggered by plans configured to ask questions.
Change	Enrollment Changes (EE Only) & (EE & Dep)	P/C	Identifies and lists all benefit enrollment/coverage changes by employee and dependent. This report can be customized from a selection of fields.	Use this report when you need to see changes in enrollment. You can run the report on individuals with relationship of "employee" only, or both "employee" and dependent relationships. The report returns one row per dependent, per benefit. User inputs "start" and "end" date for changes to be captured.
Change	Address Changes	P/C	Accounts for any employee address changes made. This can be customized to include specific address fields and by who and when the changes were made.	User inputs "start" and "end" date for changes to be captured.
Change	Age Changes/Birthdays	P/C	This accounts for any age change by employee. This can be helpful in auditing monthly costs for age-banded costs.	User inputs "start" and "end" date for changes to be captured.
Change	Name, SSN, DOB Changes	P/C	Identifies and generates a list of name, SSN, or DOB changes by employee. This report can be helpful in auditing sensitive information that are cost drivers or need to be updated in downstream systems.	User inputs "start" and "end" date for changes to be captured.
Config	Plan Assigned to Class	P/C	Plan offering by employer sponsor for all product lines. This can be used to identify which plans the employer sponsor is offering for the given plan year, regardless of current enrollment.	Run this report to confirm which plans are assigned to a specific benefit class (eligibility group), or to compare assignment across all classes. Also, useful to validate that plans are properly assigned to the appropriate Benefit Classes.

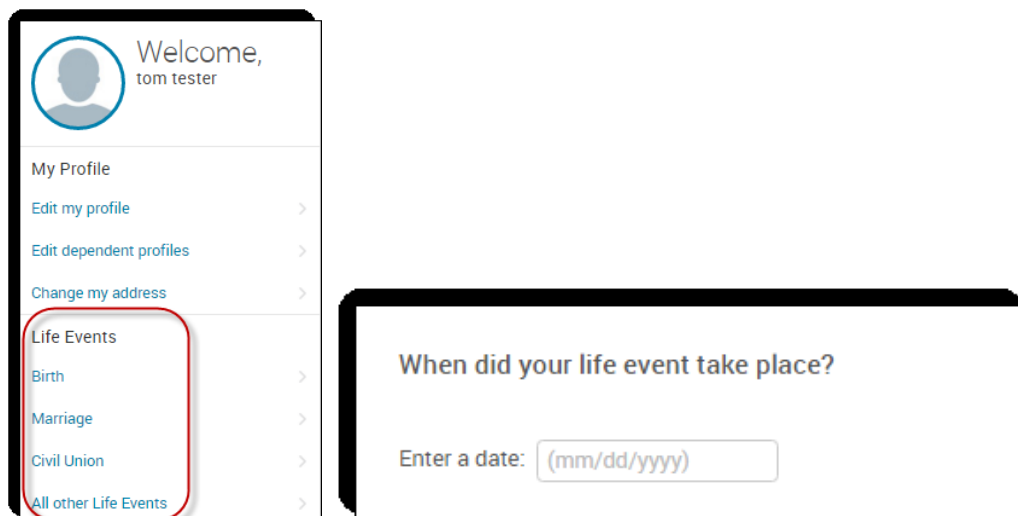
Config	Benefit Package Group Elections	P/C	Plan offering by employer sponsor for all product lines. This can be used to identify which plans the employer sponsor is offering for the given plan year. Only plans that have active enrollments will appear on this report.	Use this report to review group benefit plan(s) and bundle(s) elected during the application process. These elections determine what plan offerings are available for employees to enroll in.
Config	Rate Bands by Plan	P/C	Displays rates loaded for rate banded plans such as life and disability plans.	This report pulls rates for non-tiered plans, such as volume based (life, AD&D, STD, LTD, etc.)
Config	Costs by Benefit Class/Tier	P/C	Displays monthly costs loaded for tier based benefit plan types such as medical, dental, and vision plans by employer sponsor site.	This report pulls monthly costs for tiered plans, by plan and tier. For example, for each medical plan, it will pull monthly costs by Benefit Class, plan, and tier. It will not include volume based costs.
Config	Exchange - Enrollment Complete - Pending Audit	P	Generates a list of all applications currently in the Enrollment Complete - Pending Audit status.	Generates a list of all applications currently in the Enrollment Complete - Pending Audit status.
Enrollment	Employees in New Hire Enrollment - Not Yet Complete	P/C	Accounts for employees who have a new hire enrollment window open and have not yet completed their enrollment.	Accounts for employees who have a new hire enrollment window open and have not yet completed their enrollment.
Enrollment	Employees in Open Enrollment - Enrollment Complete	P/C	Accounts for employees who have an open enrollment window open and have completed their enrollment.	Accounts for employees who have an open enrollment window open and have completed their enrollment.
Enrollment	Employees in Open Enrollment - Not Yet Complete	P/C	Accounts for employees who have an open enrollment window open and have not yet completed their enrollment.	Accounts for employees that have an open enrollment window open and have not yet completed their enrollment.
Pending	Pending Enrollments Awaiting Approval	P/C	Lists all employee enrollments currently pending. The pend is triggered by enrollment rules as well as EOI rules when applicable.	Use this report to review any pending enrollments awaiting approval.

Pending	Approved Pending Enrollments	P/C	Lists all pending employee enrollments that were approved. This report displays when the enrollment was approved, by whom it was approved, and the approval reason.	Use this report to review all pending enrollments that have been approved. The report displays when the enrollment was approved, by whom, and the approval reason
Pending	Rejected Pending Enrollments	P/C	Lists all pending employee enrollments that were rejected with a reject reason, who rejected it, and date of rejection.	Use this report to review all pending enrollments that have been rejected. This report displays the reject reason, who rejected it and the date of the rejection.

## Life events

Employees can log on using their user name and password to process a life event. If you or an HR admin will be adding and processing the life event, please refer to the [Impersonating a User](#) section then proceed with the steps listed below.

1. From the **employee home page**, locate the “Life Events” section located on the left-hand side of the page. Select the applicable life event. If none of the life event options are applicable, select the “All Other Life Events”.



The screenshot shows the employee home page. On the left, a sidebar contains a 'Welcome, tom tester' header and a 'My Profile' section with links for 'Edit my profile', 'Edit dependent profiles', and 'Change my address'. Below this is the 'Life Events' section, which is highlighted with a red box. It contains links for 'Birth', 'Marriage', 'Civil Union', and 'All other Life Events'. To the right of the sidebar, a form titled 'When did your life event take place?' is displayed. It features a text input field labeled 'Enter a date:' with a placeholder '(mm/dd/yyyy)'.

2. Enter the date of the life event.
3. Enter the new dependent information (if applicable for the life event selected) by selecting the “Add Dependent” link. Select “Save” when you’ve entered all the information.

## Life Event

If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections. Please fill out all information requested to complete your change in coverage.

**STEP 2** Enter your life event information

**Marriage** [Change life event](#)

When did your life event take place?

Enter a date:

Enter your new dependent's information:

Name	Relationship	Date of Birth	Age	Gender
Add at least one dependent to continue				
<a href="#">+ Add Dependent</a>				

[Continue](#) [Cancel](#)

- Select "Continue" to proceed to the next page and confirm the information entered is correct.

**STEP 2** Enter your life event information

**Marriage** [Change life event](#)

When did your life event take place?

Enter a date:

Enter your new dependent's information:

Name	Relationship	Date of Birth	Age	Gender
Spouse Test	Spouse	12/20/1983	32	F

[+ Add Dependent](#)

[Continue](#) [Cancel](#)

## Life Event

If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections. Please fill out all information requested to complete your change in coverage.

**STEP 3** Confirm your information

**Marriage** [Change life event](#)

Life Event: Marriage  
 Date of Event: 07/15/2016  
 Added to Family: Spouse Test

☐ I verify that all of the above Life Event information is correct

[Save and Start Life Event Enrollment](#) [Cancel](#)

- Step through the enrollment and save the elections. \*\*Be sure to check the box next to any dependents who should be added during this enrollment. \*\*



En Español Exit Enrollment

aetna® Springboard Marketplace®

Back to Benefits Medical

Who will be covered by this plan?

☒ jen tester Employee ☐ Baby Tester Child Add Dependents

Back to Benefits Continue

Language Assistance: Español | 中文 | Tiếng Việt | 한국어 | Tagalog | Русский | العربية | Kreyòl | Français | Polski | Português | Italiano | Deutsch | 日本語 | 日本語 | Other Languages...

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## COBRA

Groups that are Group Billed will be placed in the COBRA benefit class and will be able to enroll for benefits during the group's open enrollment and/or renewal.

### Activate COBRA on existing group (group billed)

For members employed with Group Billed groups, if an employee terminates and becomes COBRA eligible, follow the steps below.

1. Search for the employee by following the instructions as outlined in the section titled [Searching for an Employee](#).
2. Assuming the member was previously terminated from employment (see [Terminating an Employee](#) for more information), from the "View/Edit" page of the member's profile, select the "Activate COBRA" link located within the left-hand navigation tool bar.

aetna® Springboard Marketplace®

Admin Exchange Admin Reports Library Role

DEMO - ABC CORPORATION  
MANAGER

Search for User Add User Impersonate User View/Edit

Life Events Employee File Family Information Benefit Coverages SSO/Webservice Log Terminate Employment **Activate COBRA** Re-Hire Employee

Demographics Employment Benefits

jen tester

Demographic Information

First Name jen  
Middle Initial  
Last Name tester  
Social Security Number xxx-xx-4585  
Date of Birth 4/5/1976  
Age 41  
Gender Female  
Import User ID  
Tester User No

3. On the “Activate COBRA” page, enter the following information:
  - a. Benefit Class: Select COBRA
  - b. Benefit Class Effective Date: Enter the COBRA effective date
  - c. Employment Status: This will pre-populate as COBRA
  - d. Employment Status Effective Date: Enter the COBRA effective date

**Activate COBRA**

jen tester

Benefit Class Employee

Benefit Class Effective Date 09/01/2017

Employment Status COBRA

Employment Status Effective Date 09/01/2017

Termination Date 9/1/2017

Save Cancel

4. Choose “Save”.
5. At this point you will need to contact the Springboard Marketplace Helpdesk for a special open enrollment so this employee can enroll.

## Adding COBRA member

Assuming you have activated COBRA for the member within Springboard. See [Activate Cobra on Existing Group](#). Now that the member has elected coverage and the Springboard Marketplace Helpdesk has opened a special open enrollment for the member, there are two ways for them to enroll.

1. Provide employee with their Springboard Marketplace username and instruct them to enroll in benefits by going to [springboardmarketplace.com](http://springboardmarketplace.com).

The screenshot shows the Aetna Springboard Marketplace user management interface. The sidebar on the left contains navigation options: Admin, Exchange Admin, Reports, Library, and Role. The main content area displays user details for 'jen tester'. The 'Demographic Information' section includes fields for First Name, Middle Initial, Last Name, Social Security Number, Date of Birth, Age, Gender, Import User ID, and Tester User. The 'Login Information' section includes fields for Login Enabled, Effective Date, Username (highlighted with a red circle), and Entry Point.

Go [here](#) to review member shopping.

2. Impersonate User allows you to view the system through the eyes of the employee. The most common reason for Impersonate User is to process an enrollment on behalf of employees when they cannot access the system.

**Important note:** You or the HR administrator **must obtain a copy of the signed paper enrollment form** from the employee being impersonated. The information entered into the system should match the information the employee entered on the form. **You or the HR Administrator must keep the signed enrollment form and the Springboard confirmation form for seven years.** You must also provide it to Aetna upon request.

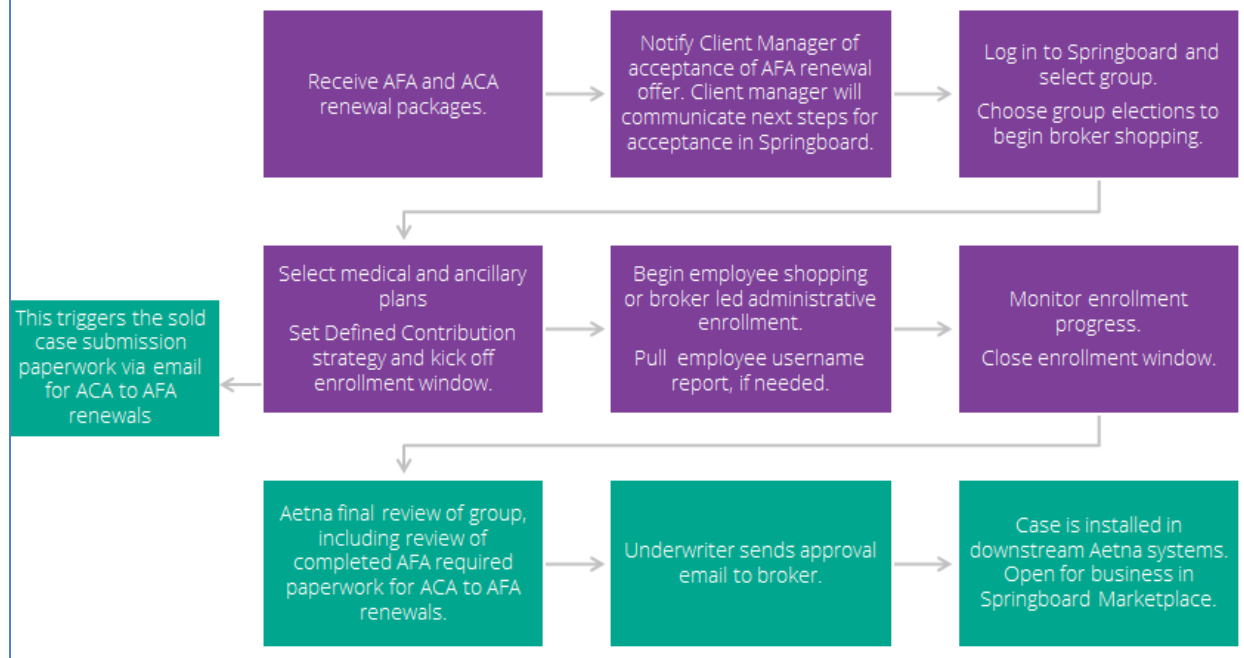
To impersonate: Go [here](#) to review Impersonating a User

## Renewing a group in Springboard

We'll send you and your client their renewal package as early as 60 days before their renewal date. If your client is currently an AFA group, they'll get an AFA renewal. If your client is currently an ACA group and a good fit for AFA, they'll get an ACA renewal and AFA plan options.

Groups using Springboard are loaded with renewing monthly costs and plans. The census at the time of the renewal package is also loaded. The Springboard process is identical for AFA to AFA renewals and ACA to AFA renewals. A request for sold paperwork will be sent outside of Springboard for ACA to AFA renewals.

## Springboard Renewals

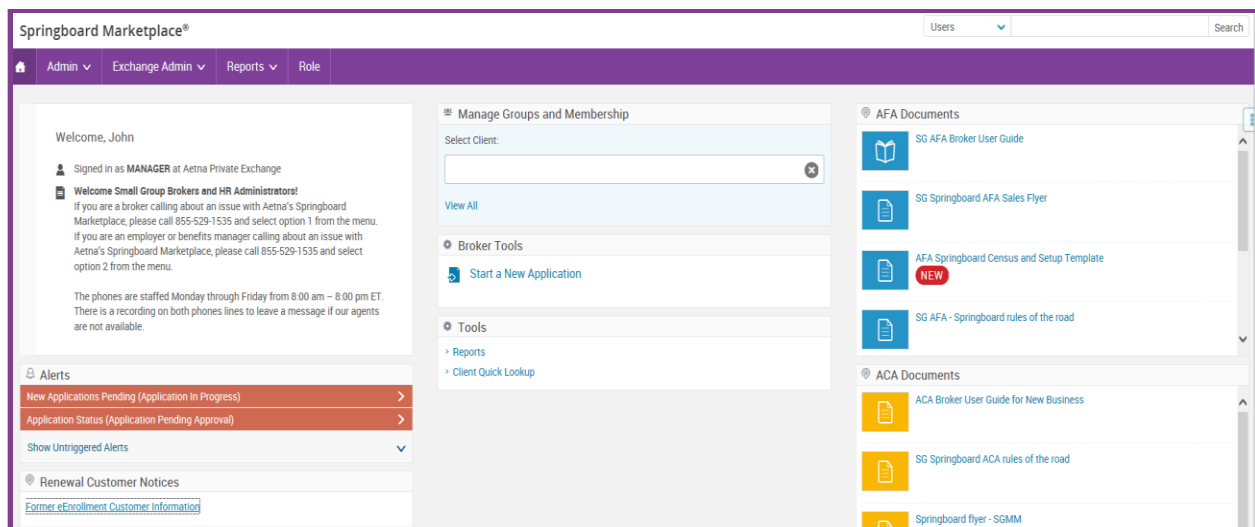


Once you have confirmation of the AFA sale, you will log in to Springboard and begin broker shopping.

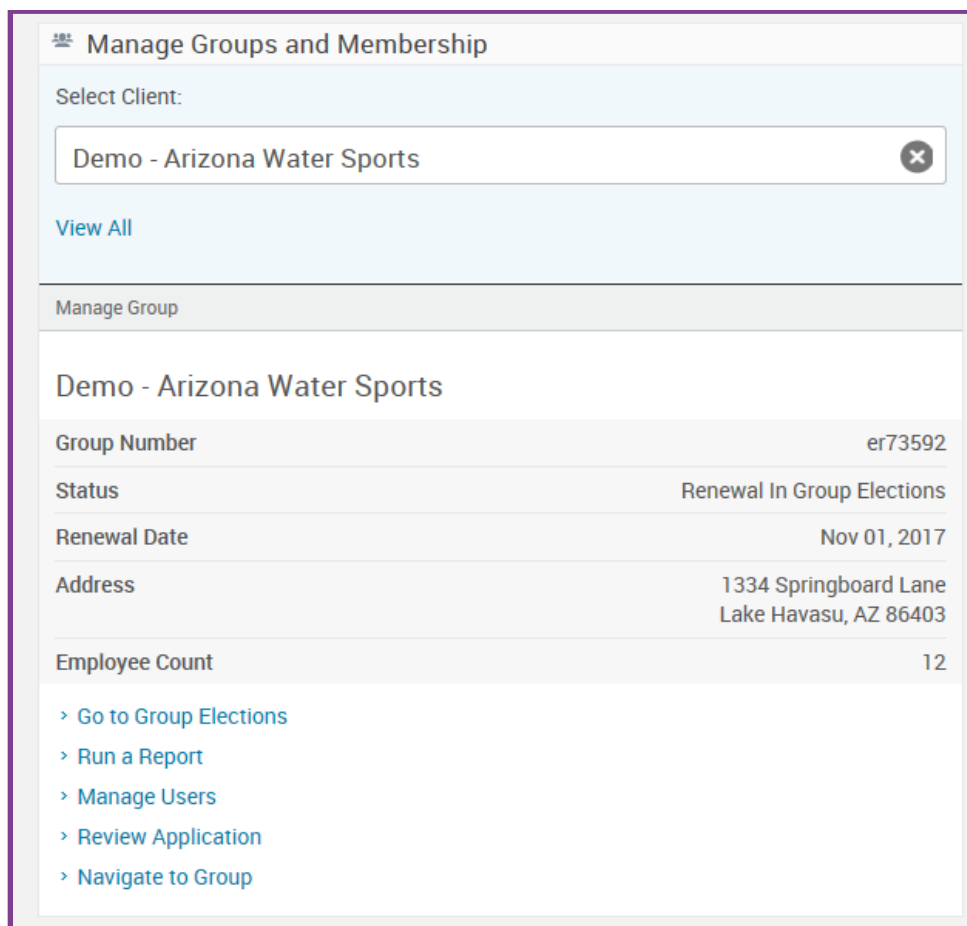
**Note:** Springboard replaces Aetna’s other online enrollment systems. For groups that currently have an EZenroll or eEnroll account, once the renewal processing is under way (about 45 days before the renewal effective date), eEnroll or EZenroll will not be available. You must complete any transactions relating to your current coverage using the applicable paper forms until your renewal effective date.

### Plan selections


On the Springboard home page, type your group’s name in the “Select Client” section under “Manage Groups and Membership”.



Select the group name and then “Go to Group Elections”:



You’ll see all available plans, including any ancillary options. You can compare plans, view all costs, and view plan details if needed.



AFA

Company Name: Demo - Becky's Phoenix Pretzels

Please choose from the plan offerings below. Your emp based on their overall eligibility. \*\*Final rates are based employer.

### Your Plan Options

Medical and Pharmacy

Here are your medical plan offerings.  
Please note: You may only offer a maximum of 4 medical plans.

[View all premiums >](#)

Medical and Pharmacy

Please note that you may be required to enroll in a medical or dental plan to be eligible to enroll in certain ancillary plans.

☒ Select all
 ☐ Deselect all
 [Show less detail](#)

☒ **AFA AZ PPO 1500 80/60 CY** [view plan details >](#) ☐ Compare Plan  
Aetna PPO  

DEDUCTIBLE:	OUT-OF-POCKET MAX:	CO-INSURANCE:
Individual: \$1,500	Individual: \$4,000	20%
Family: \$3,000	Family: \$8,000	

[HIDE PLANS >](#)

### Benefit Package Group Plan Premiums

[Export to Excel](#)

Plans	Benefit Class	Carrier	Type	Plan Type	Multiplier	Gender	Tobacco	Age range	Tier	Premium	EE Cost	ER Cost
AFA AZ Renew Hrn Nwk CPOS II 1000 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee	\$363.82	\$363.82	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Spouse	\$790.71	\$790.71	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1000 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Children	\$741.18	\$741.18	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Family	\$1,236.52	\$1,236.52	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee	\$367.83	\$367.83	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Spouse	\$756.36	\$756.36	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Children	\$709.07	\$709.07	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 1500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Family	\$1,182.04	\$1,182.04	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 2500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee	\$335.76	\$335.76	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 2500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Spouse	\$687.36	\$687.36	\$0.00
AFA AZ Renew Hrn Nwk CPOS II 2500 80/60 CY	Employee	Aetna	POS	Medical	N/A	N/A	N/A	0-999	Employee + Children	\$644.57	\$644.57	\$0.00

Check the box next to the sold medical plan(s). Groups with existing AFA plans have the renewing plans pre-checked. If the group is replacing the renewing plan, uncheck the defaulted plan and check the appropriate plan.

Medical and Pharmacy 2017

Here are your medical plan offerings.  
Please note: You may only offer a maximum of 4 medical plans.

[View all premiums >](#)

Medical and Pharmacy

Please note that you must enroll in a medical or dental plan to be eligible to enroll in a short term disability plan.

☒ Select all
 ☐ Deselect all
 [Show more detail](#)

☒ **AFA Choice POS II 1000 100/70 CY** [view plan details >](#) ☐ Compare Plan  
Aetna POS

☒ **AFA Choice POS II 1000 80/60 CY** [view plan details >](#) ☐ Compare Plan  
Aetna POS

☒ **AFA Choice POS II 1500 100/70 CY** [view plan details >](#) ☐ Compare Plan  
Aetna POS

☒ **AFA Choice POS II 1500 100/80 Int RX CY** [view plan details >](#) ☐ Compare Plan  
Aetna Rx POS

☒ **AFA Choice POS II 1500 80/60 CY** [view plan details >](#) ☐ Compare Plan  
Aetna POS

Dental, vision, life and disability plans available to the group display after medical. Check the box next to the sold product. If the group has an existing ancillary product they are not renewing, uncheck any defaulted plans. Then select "Save and Continue".

<input checked="" type="checkbox"/>	<b>STD Plan 2 \$300</b> Aetna	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	<b>STD Plan 2 \$400</b> Aetna	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	<b>STD Plan 2 \$500</b> Aetna	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan

[HIDE PLANS ^](#)

### Dependent Term Life

• Please note that you must enroll in a term life insurance plan to be eligible to enroll in a dependent life insurance plan.

☒ Select all
 ☐ Deselect all

<input checked="" type="checkbox"/>	<b>Dependent Term Life</b> Aetna	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan
-------------------------------------	-------------------------------------	--	---------------------------------------

[HIDE PLANS ^](#)

[Save & Continue](#)

## Defined contribution

You now arrive on the defined contribution screen. Select “Create a Contribution Strategy”.

**Company Name:** DEMO - Closets Closets Closets

A Contribution strategy is a set of rules for how your contributions to employee benefits will be applied and used. Think of this as how much you, the employer, will be paying for your employee's benefits.

Create a contribution strategy in three simple steps:

**1**

**Employees & Plans**

Select the employees and benefits to include in your strategy.

**2**

**Contributions**

Decide whether to contribute a simple lump sum to all plans, a lump sum to a single plan, or a specific amount to each benefit.

**3**

**Leftover**

Set rules around how your employees can spend the leftover dollars from your contributions.

[Create a Contribution Strategy >](#)

Check employee and select next.

Employee & Plan Selection
Contribution Strategy
Leftover Funds

**STEP 1: Select employees and benefit plan types**

Before setting a contribution strategy and entering amounts, you must choose which benefit classes and plans will be included in the strategy. Once you've selected your benefit classes, you can designate which plans will be eligible for contributions as part of this strategy. If your strategy includes multiple benefit classes, you will be able to select plan types that aren't assigned to all selected classes. Plan types that are not assigned to both classes will have an asterisk (\*) by their names. Once you've selected the benefit classes and plan types, you can move on to the next step, where you'll configure the rules for how employees can apply money to the plans selected here.

Which employee benefit classes will be included in this strategy?

You can apply this contribution strategy to all of your employees, or create different strategies for different classes.

Select All Deselect All

☒ Employee

Next > Save & Exit Cancel

Select the products you want to set up for defined contribution. You can choose just medical, or include dental or vision, if applicable.

Which of the following benefits will be included in this strategy?

Please select all of the plan types to which you wish to contribute. Remember to include plans that can be paid for using leftover or additional funds. You may have some plans on this list that are not available to all benefit classes chosen above. These plans, marked with an asterisk (\*), can still be selected for inclusion in this strategy.

How does this work?

Select All Deselect All

☒ Medical

\* means that the plan is not shared across all benefit classes chosen

Next > Save & Exit Cancel

Choose next.

**OPTIONAL: Create a title for your strategy**

This name will be used for administrative purposes only and will not be shown to employees. By default, your strategy name will be the benefit class name. If you select more than one benefit class, the default name will be the first benefit class in your selection.

Strategy title  250 Characters max

Next > Save & Exit Cancel





**How does this work?**

☐ I want to contribute a single lump sum

Monthly (\$0.00 per year)

☒ I want to break out my contribution.

☐ Contribute a flat dollar amount

☒ Contribute a percentage

No rate bands built for this plan type

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
% 100	% 100	% 100	% 100

Next > Save & Exit Cancel View Costs

## Percentage less than 100%, all plans

Strategy: Percentage, less than 100% to any tier, across all plans

**2. Employer Contribution (Indicate selections with an X and provide values):**

	Percentage (%)	X	OR	Dollar Amount (\$)	
	Medical			Dental	Vision
ER Contribution for Employee Only	100%				
ER Contribution for Employee & Spouse	75%				
ER Contribution for Employee & Child(ren)	75%				
ER Contribution for Employee & Family	75%				
Percentage to be applied across:	All Plans	X	OR	A Base Plan	Base Plan Name
Single lump sum for all benefits					

Use the defined contribution tool to calculate the actual percentage for each tier. If, for example, 100% EE Only and 75% Dep is selected, do not enter this into Springboard. The calculations will be incorrect.

Open the tool and enter the requested percentages for EE contribution and dependent contribution. Then enter the full tier monthly costs for one plan into the respective rows in Column B.

A	B	C	D	E
	EE Contribution	100.00%		
	Dependent Contribution	75.00%		
	Plan 1	AFA Choice POS II 2500 80/60 VP		
	Total Cost Cost	Employer Contribution Amount	Springboard Tier %	Employee Contribution
EE Only	\$ 508.37	508.37	100.00%	\$ -
EE & Spouse	\$ 1,215.19	1038.49	85.46%	\$ 176.70
EE & Child (ren)	\$ 1,142.48	983.95	86.12%	\$ 158.53
Family	\$ 1,797.98	1475.58	82.07%	\$ 322.40

In Springboard, select “Contribute to one benefit, Medical, Next”.

### How do you wish to contribute to your employees' benefits?

There are three primary contribution methods: giving employees one lump sum to use for all plans (with restrictions such as per-benefit spending limits to make sure the money is spread out); contributing specific amounts to one benefit, then using leftover or additional contributions to fund others; or contributing different amounts to different benefits. For examples of how each strategy might work, look at the “How does this work?” tooltip below.

**How does this work?**

☐ Contribute a single lump sum for all benefits in strategy

☒ Contribute to one benefit

☒ Medical

**Next >** [Save & Exit](#) [Cancel](#)

Select “I want to break out my contribution, contribute a percentage”, and enter the Springboard Tier percentages into their respective fields.

☒ I want to break out my contribution.

☐ Contribute a flat dollar amount

☒ Contribute a percentage

No rate bands built for this plan type

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
% 100	% 85.46	% 86.12	% 82.07


**Next >** [Save & Exit](#) [Cancel](#) [View Costs](#)

Select no and then next.

Additional Plan Funding

How much do you want to contribute to additional plans per month?

In this step, you can choose to give an additional lump sum to your employees. This money will supplement the contributions you have already entered for the plans above. For example, if you've designated contributions for Medical and Dental plans but also want to help cover elections like an Accident or Life plan, you can designate an allowance for that here.

 How does this work?

Do you want to contribute additional money?

☐ Yes

☒ No

Next >

Save & Exit

Cancel

Select no and then next.

If an employee has leftover defined contribution dollars, can that money be applied to other benefits in this strategy?

☐ Yes, employees may apply leftover funds to other benefits

☒ No, employees cannot apply leftover funds to other benefits


Next >

Save & Exit

Cancel

Choose save.

Save Defined Contributions

 Save

Cancel

### Percentage to base plan

Strategy: percentage to base plan.

3. Employer Contribution (indicate selections with an x and provide values):					
	Percentage (%)	X	OR	Dollar Amount (\$)	
	Medical			Dental	Vision
ER Contribution for Employee Only	75%				
ER Contribution for Employee & Spouse	50%				
ER Contribution for Employee & Child(ren)	50%				
ER Contribution for Employee & Family	50				
Percentage to be applied across:	All Plans		OR	A Base Plan	X Base Plan Name
					AFA CPOS II 2000 100/70
Single lump sum for all benefits					

In Springboard, select “Contribute to one benefit, Medical, and click Next”.

How do you wish to contribute to your employees' benefits?

There are three primary contribution methods: giving employees one lump sum to use for all plans money is spread out); contributing specific amounts to one benefit, then using leftover or addition different benefits.

For examples of how each strategy might work, look at the "How does this work?" tooltip below.

**i** [How does this work?](#)

☐ Contribute a single lump sum for all benefits in strategy

☒ Contribute to one benefit

☒ Medical

**Next >** [Save & Exit](#) [Cancel](#)

Select “I want to break out my contribution and Contribute a flat dollar amount”. Select the appropriate plan in the percent calculator drop-down. Enter the requested tier amounts. Then choose calculate contributions.

☒ I want to break out my contribution.

☐ Contribute a flat dollar amount

☐ Contribute a percentage

---

No rate bands built for this plan type

**Percent Calculator** ⓘ

AFA Choice ▾

Employee: 75 %

Employee + Spouse: 50 %

Employee + Child(ren): 50 %

Employee + Family: 50 %

[Calculate Contributions](#)

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
\$ 460.23	\$ 666.99	\$ 623.08	\$ 1062.30

Select no and then next.

**Additional Plan Funding**

How much do you want to contribute to additional plans per month?

In this step, you can choose to give an additional lump sum to your employees. This money will supplement the contributions you have already entered for the plans above. For example, if you've designated contributions for Medical and Dental plans but also want to help cover elections like an Accident or Life plan, you can designate an allowance for that here.

ⓘ [How does this work?](#)

Do you want to contribute additional money?

☐ Yes

☒ No

[Next >](#) [Save & Exit](#) [Cancel](#)

Select no and then next.

If an employee has leftover defined contribution dollars, can that money be applied to other benefits in this strategy?

- ☐ Yes, employees may apply leftover funds to other benefits
- ☒ No, employees cannot apply leftover funds to other benefits

**Next >** [Save & Exit](#) [Cancel](#)

Choose save.

**Save Defined Contributions**

**✓ Save** [Cancel](#)

### Dollar amount across all plans

Strategy: Dollar amount and all plans.

3. Employer Contribution (indicate selections with an x and provide values):					
	Percentage (%)	<b>OR</b>	Dollar Amount (\$)	X	
	<b>Medical</b>		<b>Dental</b>		<b>Vision</b>
ER Contribution for Employee Only	\$350				
ER Contribution for Employee & Spouse	\$600				
ER Contribution for Employee & Child(ren)	\$600				
ER Contribution for Employee & Family	\$600				
Percentage to be applied across:	All Plans	<b>X</b>	<b>OR A Base Plan</b>		Base Plan Name
Single lump sum for all benefits					

In Springboard, select “Contribute to one benefit, Medical, Next”.

**How do you wish to contribute to your employees' benefits?**

There are three primary contribution methods: giving employees one lump sum to use for all plans (with restrictions such as per-benefit spending limits to make sure the money is spread out); contributing specific amounts to one benefit, then using leftover or additional contributions to fund others; or contributing different amounts to different benefits. For examples of how each strategy might work, look at the "How does this work?" tooltip below.

**How does this work?**

☐ Contribute a single lump sum for all benefits in strategy  
☒ Contribute to one benefit  
     ☒ Medical

Next >   Save & Exit   Cancel

Select "I want to break out my contribution, contribute a flat dollar amount". Enter the requested amount in each tier.

☒ I want to break out my contribution.  
     ☒ Contribute a flat dollar amount  
     ☐ Contribute a percentage

No rate bands built for this plan type

Percent Calculator **i**  
 Select Plan ▼

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
\$ 350	\$ 600	\$ 600	\$ 600

Select no and then next.

**Additional Plan Funding**

**How much do you want to contribute to additional plans per month?**

In this step, you can choose to give an additional lump sum to your employees. This money will supplement the contributions you have already entered for the plans above. For example, if you've designated contributions for Medical and Dental plans but also want to help cover elections like an Accident or Life plan, you can designate an allowance for that here.

**How does this work?**

Do you want to contribute additional money?

☐ Yes  
☒ No

Next >   Save & Exit   Cancel



Select no and then next.

If an employee has leftover defined contribution dollars, can that money be applied to other benefits in this strategy?

☐ Yes, employees may apply leftover funds to other benefits
   
☒ No, employees cannot apply leftover funds to other benefits

[Next >](#)
[Save & Exit](#)
[Cancel](#)

Choose save.

Save Defined Contributions

[✔ Save](#)
[Cancel](#)

### Dollar amount to base plan

Strategy: Dollar Amount, A Base Plan.

3. Employer Contribution (indicate selections with an x and provide values):						
	Percentage (%)	OR	Dollar Amount (\$)	X		
	Medical		Dental		Vision	
ER Contribution for Employee Only	\$350					
ER Contribution for Employee & Spouse	\$600					
ER Contribution for Employee & Child(ren)	\$600					
ER Contribution for Employee & Family	\$600					
Percentage to be applied across:	All Plans	OR	A Base Plan	X	Base Plan Name	AFA CPOS II 2000 100/70
Single lump sum for all benefits						

In Springboard, select “Contribute to one benefit, Medical, Next”.

**How do you wish to contribute to your employees' benefits?**

There are three primary contribution methods: giving employees one lump sum to use for all plans (with restrictions such as per-benefit spending limits to make sure the money is spread out); contributing specific amounts to one benefit, then using leftover or additional contributions to fund others; or contributing different amounts to different benefits. For examples of how each strategy might work, look at the "How does this work?" tooltip below.

**How does this work?**


☐ Contribute a single lump sum for all benefits in strategy  
☒ Contribute to one benefit  
☒ Medical

Select "I want to break out my contribution, Contribute a flat dollar amount." Then enter the requested amount in each tier.

☒ I want to break out my contribution.  
☒ Contribute a flat dollar amount  
☐ Contribute a percentage

No rate bands built for this plan type

Percent Calculator **i**

Select Plan 

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
\$ <input type="text" value="350"/>	\$ <input type="text" value="600"/>	\$ <input type="text" value="600"/>	\$ <input type="text" value="600"/>

Select no and then next.

**Additional Plan Funding**

**How much do you want to contribute to additional plans per month?**

In this step, you can choose to give an additional lump sum to your employees. This money will supplement the contributions you have already entered for the plans above. For example, if you've designated contributions for Medical and Dental plans but also want to help cover elections like an Accident or Life plan, you can designate an allowance for that here.

**How does this work?**

Do you want to contribute additional money?

☐ Yes  
☒ No

Select no and then next.

If an employee has leftover defined contribution dollars, can that money be applied to other benefits in this strategy?

- ☐ Yes, employees may apply leftover funds to other benefits
- ☒ No, employees cannot apply leftover funds to other benefits

**Next >** [Save & Exit](#) [Cancel](#)

Choose save.

Save Defined Contributions

**✓ Save** [Cancel](#)

## Single lump sum

Strategy: Single lump sum for all benefits

2. Employer Contribution (indicate selections with an X and provide values):						
	Percentage (%)	OR	Dollar Amount (\$)			
	Medical		Dental		Vision	
ER Contribution for Employee Only						
ER Contribution for Employee & Spouse						
ER Contribution for Employee & Child(ren)						
ER Contribution for Employee & Family						
Percentage to be applied across:	All Plans	OR	A Base Plan		Base Plan Name	
Single lump sum for all benefits	\$500.00					

Select "Contribute a single lump sum for all benefits in strategy". Then choose next.

### How do you wish to contribute to your employees' benefits?

There are three primary contribution methods: giving employees one lump sum to use for all plans (with restrictions such as per-benefit spending limits to make sure the money is spread out); contributing specific amounts to one benefit, then using leftover or additional contributions to fund others; or contributing different amounts to different benefits. For examples of how each strategy might work, look at the "How does this work?" tooltip below.

#### How does this work?

☒ Contribute a single lump sum for all benefits in strategy

☐ Contribute to one benefit

Next >


Save & Exit

Cancel

Enter the appropriate amount and choose next.

### How much do you want to offer to your employees?

Enter the lump sum that your employees will receive on a monthly or annual basis. Once you've designated the contribution amount, you'll be able to set up additional rules for how employees can use it (such as which benefits can receive funds and how much of the lump sum can be applied to each benefit.)

\$ 500.00  Monthly (\$ 6000.00 per year)

Next >

Save & Exit

Cancel

Check medical and leave the limit field blank. Choose next.

### Which plan types do you want to contribute to?

If you would like to limit the amount an employee can spend on certain benefits, you can set up those rules here. For example, if you're giving your employees \$300/month and you don't want them to spend all of that money on a Health plan, you can set a limit of \$200/month for Health, ensuring that employees have at least \$100 left to spend on other plans.

BENEFIT TYPE

LIMITS

[Select All](#) [Deselect All](#)

☒ Medical

\$

Next >

Save & Exit

Cancel

Choose save.

### STEP 3: Determine How Employees Can Use Leftover Funds

Depending on your contribution strategy, some employees may have money left over after they elect their driver plan (the first plan type listed in enrollment, usually Health or Medical). For example, a company may provide \$400 to spend on Health but offer plans that only cost \$200 or \$300. If leftover funds are allowed, employees can take some or all of that extra money and use it to help cover other benefits.

In this step, you'll choose whether or not to allow leftover funds. If they are allowed, you can also set up additional rules, such as how much leftover fund money can be used and which plans it can be applied to.

Leftover funds can only come from your strategy's driver plan. If your Health plan is the driver plan but an employee has money left over from his or her Dental plan, that extra money will not be treated as leftover funds and can not be used toward other elections.

You have chosen to contribute a lump sum, and as such, you don't need to worry about setting up leftover funds. Please save your strategy.

#### Save Defined Contributions

✓ Save Cancel

## Starting employee open enrollment

Once you've completed the defined contribution section, you'll start the open enrollment period. If you're completing enrollments on behalf of the employees, select "Complete employee enrollments on their behalf". Then choose "Continue to Enrollment".

If the employees are completing their own enrollment, select "Start an Open Enrollment window for employees". If you'd like to send an email to each employee with their user name and log in instructions, select "Yes, send an email notification".

Note: work email addresses are loaded to the employee's profile if we have them on file. If addresses are missing or incorrect, the system-generated email will not be received. You can run a report to see if Springboard has the correct addresses for the employees. You can update the missing or incorrect addresses by accessing the profile of each employee in User Admin.

Email addresses are not required for employees to log in to Springboard or complete enrollment. The open enrollment email only serves as a notification of user name. Instead, you can pull a user name report to provide to the plan sponsor or employees.

Return to Aetna Private Exchange

## Start Enrollment

Open Enrollment: July 17 – July 26

You can vary your contribution strategy for every variation in premium. For example, you could contribute more for older employees whose premiums may be higher.

How would you like to proceed for employee enrollment?

☐ Start an Open Enrollment window for employees:

- ☒ Yes, send an email notification
- ☐ No, do not send an email notification

☒ Complete employee enrollments on their behalf

Continue to Enrollment >

2 Start Enrollment

The group will now be in “Renewal Enrollment in Progress” status. This will notify us of the sale. For ACA to AFA renewals, we’ll send you the sold case paperwork request.

Any census changes between the time of the renewal package and the time you open enrollment are automatically updated within Springboard.

### Member shopping

This is our preferred method of employee open enrollment. If this option is selected, employees will receive an email notification once Springboard has been set up and is ready for the shopping experience.

Employees will log in into Springboard and start their enrollment by accessing [springboardmarketplace.com](http://springboardmarketplace.com). (Employees will get their user name and initial password logic in the email provided. If they misplace the email, employees may also select the “for Employees and HR Administrators” link listed below the “Need Assistance” heading. This will provide the employee with their user name logic as well as the initial password logic.)

Springboard Marketplace® EN ESPAÑOL

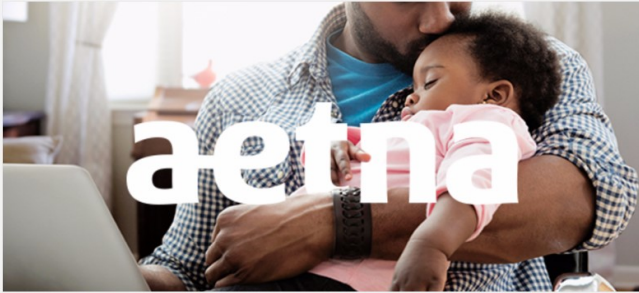
### Log In

Username

Password

[First Time User](#)  
[Forgot Password](#)

[Log In](#)



**Need assistance?**  
Click the appropriate role below for assistance.

[for Small Group Brokers](#)  
[for Employees and HR Administrators](#)

After logging in, employees can start their enrollment by selecting “Start Your Enrollment”.

En Español [Preferences](#) [Change Password](#) [Log Out](#)


**aetna** Springboard Marketplace®

[Home](#)
[My Benefits](#)
[My Profile](#)
[Library](#)

Welcome to your enrollment!

Enrollment Deadline 10/26/2017  
Your Status: Not Started

[Start your Enrollment](#)



Welcome, Katy Perry

**My Profile**

[Edit my profile](#)  
[Edit dependent profiles](#)  
[Change my address](#)

**Life Events**

[Birth](#)  
[Marriage](#)  
[Civil Union](#)  
[All other Life Events](#)

**Start today with Apple Watch – for as low as \$25**

It's not about what you did yesterday. It's about what you do today. Whether it's crushing that to-do list or taking the stairs, Aetna wants to offer you an Apple Watch for as low as \$25 plus tax to help celebrate the wins, big or small.

[Shop now](#)

**Questions?**  
Click the document below to download the most frequently asked questions.  
[Apple Watch FAQ](#)

**My Benefits**

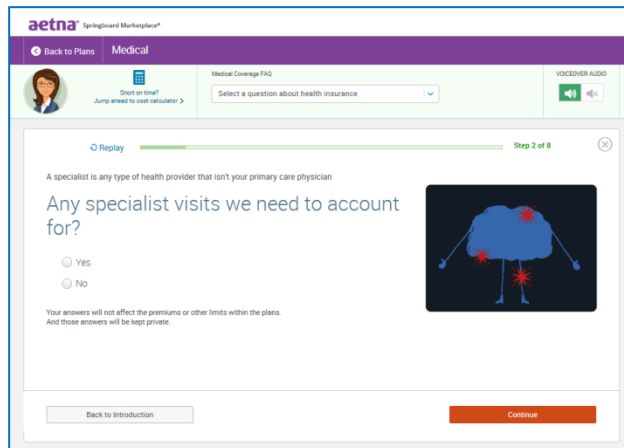
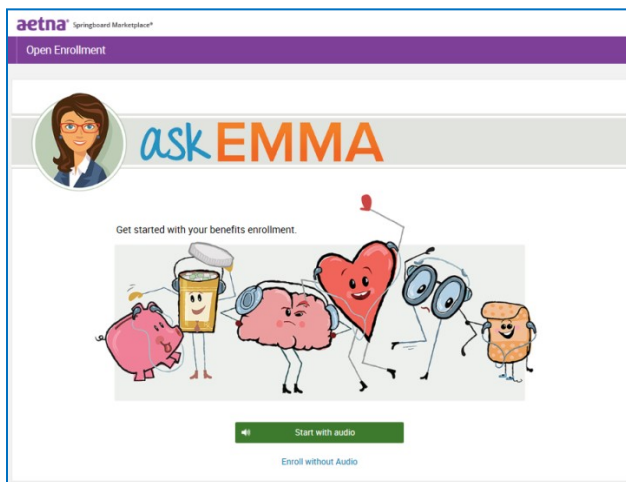
Effective Date: 9/14/2017

You have no active benefits as of 9/14/2017.

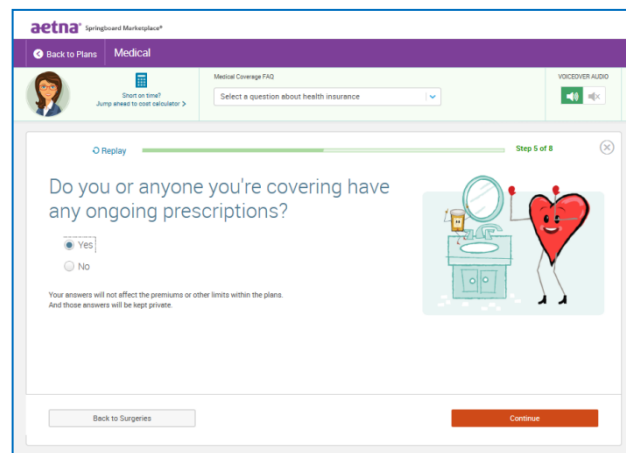
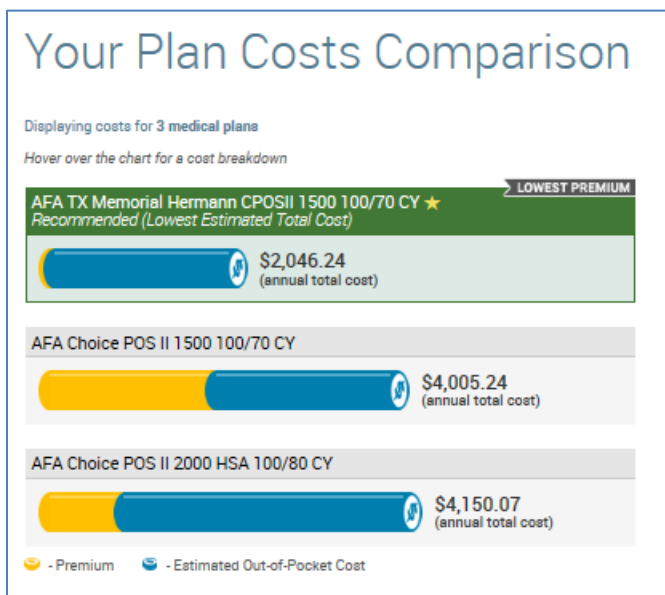
This shop now panel will not appear until the member elects an AFA medical plan. They will click the house on the menu bar to return to this page after they complete their enrollment.

As long as the employee is enrolling in an AFA medical plan, they are eligible to purchase an Apple Watch for as low as \$25 by selecting the “Shop now” link. (Not eligible for waivers or dependents.)

Emma, our online benefit advisor, will guide the employee through the enrollment process. Emma will also help determine the best plan option for the member based upon the answers to a series of questions. These pertain to how they will use their benefits while taking into account their monthly costs.



Ask Emma will highlight her recommendation after the employee has provided the answers to the health questions she presents.



Employees can then select their plan by choosing the “Select” button. (Emma’s recommendation will be highlighted with a green box around the plan. But employees can select any of the plans offered by their employer.)



Forgot Something? [Edit My Answers](#) Medical Coverage FAQ [Select a question about health insurance](#) VOICEDOVER AUDIO

Who will be covered by this plan?

☒ Jenise Litman (Employee) [Add Dependents](#)

[View All Plans Side-by-Side](#)

AFA TX Memorial Hermann CPOSII 1500 100/70 CY				Your Cost per month:	
Aetna POS				\$0.00	▼
DEDUCTIBLE:	OUT-OF-POCKET MAX	CO-INSURANCE: 0%	View plan details	Original Cost	\$179.67
Individual: \$1,500	Individual: \$4,000			Benefit/Block	\$278.67
Family: \$3,000	Family: \$8,000				
				<a href="#">Select</a>	

Provider Search

Click here to search for a participating provider.

YOUR ANNUAL COSTS	PREMIUM X 12 MONTHS	ESTIMATED ANNUAL OUT-OF-POCKET SPENDING	YOUR ESTIMATED ANNUAL TOTAL COST	IN-NETWORK MAXIMUM COST
Explain this	\$0	\$3,300	\$3,300	\$4,000

Based on your answers, we recommend this plan [Start](#)

AFA Choice POS II 2000 HSA 100/80 CY				Your Cost per month:	
Aetna POS				\$83.91	▼
DEDUCTIBLE:	OUT-OF-POCKET MAX	CO-INSURANCE: 0%	View plan details	Original Cost	\$363.58
Individual: \$2,000	Individual: \$3,275			Benefit/Block	\$278.67
Family: \$4,000	Family: \$6,550				
				<a href="#">Select</a>	

Provider Search

Click here to search for a participating provider.

YOUR ANNUAL COSTS	PREMIUM X 12 MONTHS	ESTIMATED ANNUAL OUT-OF-POCKET SPENDING	YOUR ESTIMATED ANNUAL TOTAL COST	IN-NETWORK MAXIMUM COST
Explain this	\$1,006.92	\$3,275	\$4,281.92	\$4,281.92

AFA Choice POS II 1500 100/70 CY				Your Cost per month:	
Aetna POS				\$163.25	▼
DEDUCTIBLE:	OUT-OF-POCKET MAX	CO-INSURANCE: 0%	View plan details	Original Cost	\$463.52
Individual: \$1,500	Individual: \$4,000			Benefit/Block	\$278.67
Family: \$3,000	Family: \$8,000				
				<a href="#">Select</a>	

Provider Search

Employees will then confirm their selections and “Complete Enrollment”.

**aetna** Springboard Marketplace®

**Review and Confirm**

**Please Review All of Your Selections**

Once you have completed your review, click the “Complete Enrollment” button at the right side of the page.

\*Indicates changed benefits

Your Total Cost **\$132.99** Per Month

**Medical\*** Your cost per month **\$132.99**

AFA TX Memorial Hermann CPOSII 1500 100/70 CY

Aetna Coverage: Employee

Who will be covered on this plan:

Name	Relationship	Coverage
Martin Truex	Employee	<input checked="" type="checkbox"/> Cover

[Medical](#)

Cost Details Per Month

Total Premium	\$602.12
Employer Contribution	(\$469.13)
Your Cost	\$132.99

1 Your Info

2 Your Benefits

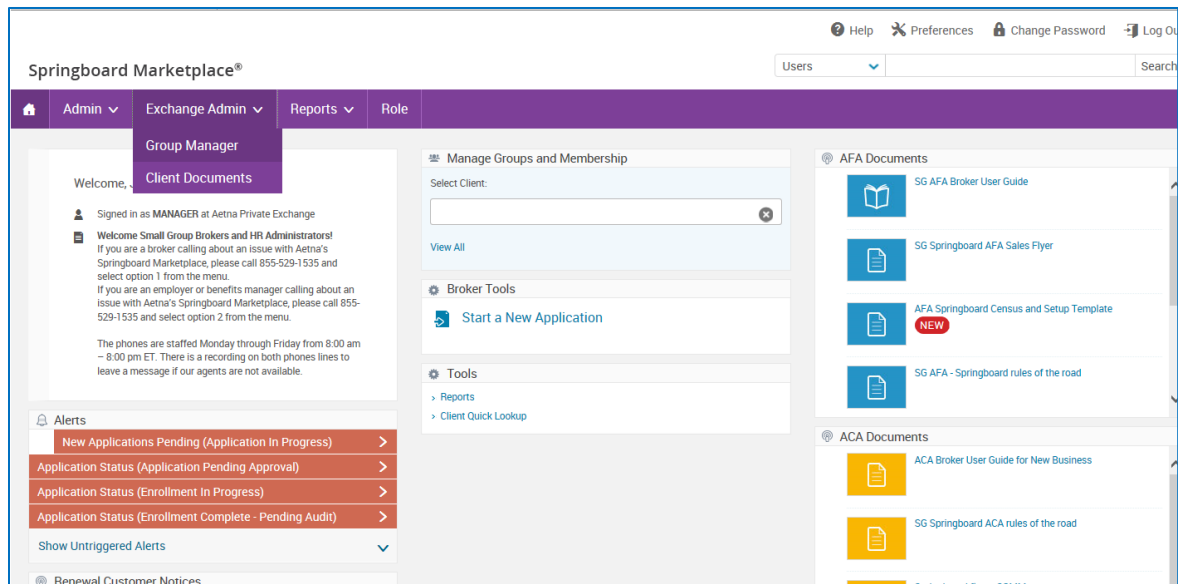
3 Enroll

4 Complete

[Complete Enrollment](#)

## Group quick admin enrollment

From the menu bar, hover over “Exchange Admin” and then select “Group Manager”.



Enter the name of the group and select “Search”. Then choose the group’s hyperlink.

### Group Manager

Search for an Existing Employer Application or Add a New Employer Application

Group Name 
Group Number 
Application Status 
Employer Application

Exchange Effective Date 
Process

Group Name	Group Number	Saved By	Saved On	Status	Process	Effective Exchange Date
DEMO - Norcross Gym DBA George	999874705	Mims, Dorothy	7/27/2017	Enrollment In Progress	Default	8/1/2017

Select “Continue Administrative Enrollment/End Enrollment”.

Group Name:  
**DEMO - Norcross Donuts DBA Franks**

STATUS: **Enrollment In Progress**

[> Review Application](#)  
[> Continue Administrative Enrollment/End Enrollment](#)

All employees (enrolling or waiving) and dependents enrolled in the existing plan will be listed on this page. Coverage tier defaults to employee only, regardless of the actual enrolled tier.

Expand All Collapse All		PREMIUM (PER MONTH)	
Employee	Allen, Barry ( age 30 , zip 30301 )	Manage Family Information	\$0.00
Medical	<input checked="" type="checkbox"/> Barry Allen Employee <input type="checkbox"/> Ivory Allen Spouse <input type="checkbox"/> Jade Allen Child	PLAN AFA Choice POS II 1000 100/70 CY	COVERAGE Employee \$0.00

Any completed enrollments done through administrative enrollment or by the employee through member shopping will be reflected on this screen, as well.

Employee	James, John ( age 59 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> John James Employee	PLAN Select Plan	COVERAGE -
Employee	Johnson, Dwayne ( age 38 , zip 30301 )	Manage Family Information	\$0.00
Medical	<input checked="" type="checkbox"/> Dwayne Johnson Employee	PLAN AFA Choice POS II 3500 80/60 CY	COVERAGE Employee \$0.00
Employee	Lee, Rhonda ( age 44 , zip 30301 )	Manage Family Information	\$1,535.76
Medical	<input checked="" type="checkbox"/> Rhonda Lee Employee <input checked="" type="checkbox"/> Robert Lee Spouse <input checked="" type="checkbox"/> Melissa Lee Child <input checked="" type="checkbox"/> Sarah Lee Child	PLAN AFA Choice POS II 1000 100/70 CY	COVERAGE Employee + Family \$1,535.76

To process enrollment, select the arrow on the “Plan” drop-down for the chosen employee. Select the appropriate plan.

Expand All Collapse All		PREMIUM (PER MONTH)	
Employee	Allen, Barry ( age 30 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> Barry Allen Employee <input type="checkbox"/> Ivory Allen Spouse <input type="checkbox"/> Jade Allen Child	PLAN Select Plan	COVERAGE -
Employee	Gladstone, Joey ( age 29 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> Joey Gladstone Employee <input type="checkbox"/> Rebecca Gladstone Spouse <input type="checkbox"/> Alex Gladstone Child	PLAN Select Plan	COVERAGE -
Employee	Grant, Jackson ( age 25 , zip 30301 )	Manage Family Information	-
Medical	<input checked="" type="checkbox"/> Jackson Grant Employee	PLAN Select Plan	COVERAGE -

Coverage tier and monthly costs will update based on the selection. Monthly cost is the employee’s cost after defined contributions have been applied.

Expand All Collapse All

Employee Allen, Barry ( age 30 , zip 30301 ) Manage Family Information PREMIUM (PER MONTH) \$0.00

Medical ☒ Barry Allen Employee ☐ Ivory Allen Spouse ☐ Jade Allen Child PLAN AFA Choice POS II 1000 100/70 CY COVERAGE Employee \$0.00

To modify or review additional dependent demographic information, or to add dependents, select “Manage Family Information” next to the employee’s name. Unselect the green checkmark next to the dependent’s name if the dependent chooses not to enroll. Select the box next to each dependent to be enrolled.

Expand All Collapse All

Employee Allen, Barry ( age 30 , zip 30301 ) Manage Family Information PREMIUM (PER MONTH) \$1,535.76

Medical ☒ Barry Allen Employee ☒ Ivory Allen Spouse ☒ Jade Allen Child PLAN AFA Choice POS II 1000 100/70 CY COVERAGE Employee + Family \$1,535.76

If you need to add any dependents, select “Add Dependents”. Enter the required information.

Family Information

Barry Allen

Female Employee

30 years old (11/19/1986)

SSN: XXX-XX-6782

Ivory Allen

Male Spouse

31 years old (2/19/1986)

SSN: XXX-XX-6781


Edit >

Jade Allen

Male Child

6 years old (5/19/2011)

Edit >



Add Dependents

Return To Group Enrollment

Note: Correct employee Social Security numbers and street address are required during enrollment. If they were not supplied on the initial census, they will need to be entered by choosing the “Manage Employee Information” link.

## Ending employee enrollment

Final review by Aetna will begin once all employee enrollments are completed and enrollment has ended.

You can monitor enrollment status of all employees by going to “Manage Groups and Membership” on your home page and selecting “Review Application”.

**Manage Groups and Membership**

Select Client:

Demo - Brawler Brewing

[View All](#)

---

Manage Group

Demo - Brawler Brewing

Group Number	999874271
Status	Enrollment In Progress
Renewal Date	
Address	321 Springboard Way Philadelphia, PA 19123
Employee Count	20

- > Run a Report
- > Manage Users
- > Review Application
- > Navigate to Group

Select the “Group Information” tab and then “Continue Administrative Enrollment/End Enrollment”.

Group Name:

DEMO - Norcross Donuts DBA Franks

Group Information   Application Information   Benefits Information   Billing Information

---

STATUS: Enrollment In Progress

- > Review Application
- > Continue Administrative Enrollment/End Enrollment

Confirm every employee has a plan selection or shows waived coverage.

Employee	Seaworth, Davos ( age 44 , zip 77024 )	Manage Family Information	(M)	X	-
Medical	<input checked="" type="checkbox"/> Davos Seaworth Employee	PLAN Select Plan	COVERAGE	-	
Medical	<input checked="" type="checkbox"/> Jon Snow Employee	PLAN AFA TX Memorial Hermann CPOSII 1500 100/70 (	COVERAGE	\$0.00	
Medical	<input checked="" type="checkbox"/> Arya Stark Employee	PLAN Select Plan	COVERAGE		

Confirm each member has a selection. Select Plan indicates enrollment is not complete.

Once you have verify enrollment is complete and every employee has a plan selection or shows waived coverage, end enrollment by selecting “Submit Enrollment”.

Note: Employee demographic information is required before you will be able to select “Submit Enrollment”.

This will send a notification back to Aetna for final review and approval. At this time the group will move to “Renewal Enrollment Complete – Pending Audit status”.

## Final review and approval

Once all paperwork is received and enrollment closed, Aetna will review the group for approval. Once approved, we will send you the approval letter and enroll the members in our downstream systems.

### Important Note

Aetna assumes no responsibility for an Employer’s or Plan Sponsor’s contribution strategy or, if applicable, self-funded plan design.

Brokers’ use of Springboard Marketplace® is subject to the terms and conditions contained within the Springboard Marketplace platform. Brokers may not limit or waive those terms or conditions in any way.

