A Step by Step to Employee Enrollment

The Optimal teleHealth back-office software typically provides multiple ways to accomplish any given task and that is no different with employee enrollment. Within the Group Benefits Manager Dashboard there is a link to video tutorials that explain all functionality relative to the Benefits Administrator, but this document will provide a step-by-step quick reference to each of the enrollment procedures.

Send New-Hire Email

The most frequently used process for enrollment of a new employee will be the "Send New-Hire Enrollment" button in the administrator's dashboard. Onboarding a new employee typically involves a lot of administrative work, so this functionality was designed to offload the presentation of your Optimal teleHealth healthcare memberships to the new employee and give them the ability to make their membership choices on their own time, sharing those decisions with family members or coaches.

1. Login to the benefits administrator dashboard and click the "Send New-Hire Enrollment" button.
2. If this is the first time using this functionality, review the sample email and edit it to meet your specific needs. All changes will remain in place for future emails.
3. Notice there are several tag inserts listed above the actual email which can be used to insert pre-defined information into the email. The sample template already utilizes most of these tags. The source of certain information attached to the tags is already present in your group's database within the Optimal teleHealth system.
4. If you're enrolling a new employee, click "New Employee", but if you are enrolling an existing employee who is already listed in the employee database, click "Select Employee from Database".
5. Enter employee email address, first name and last name.
6. Select the date you want the email to be sent to the employee. If they are eligible for benefits immediately, select today's date, but if there is a waiting period, select an appropriate future date.
7. Confirm the email content is correct and appropriate. Upon completion, you can test the output by sending one to yourself, just remember to delete the test employee after the test.
8. Supporting documents in a compatible format can be attached before sending. It is recommended a document disclosing company financial participation in benefit expense be attached as a separate document to accommodate periodic changes or variances between financial support for different classes of employees.
9. Click the "Submit" button and you will see a confirmation screen indicating the email has been sent or is queued up to be sent to the new employee.

10. The email received by the employee will contain two links, one for the benefits orientation video and another for the enrollment preference form. Upon employee submission of the enrollment preference form, the data contained on the form will flow into the Employee Database, and the Group Admin will receive an email notifying them a new employee enrollment form has been submitted.
11. The Group Admin will access the new employee record from their dashboard by clicking “Manage Employees”.
12. From the dashboard, click “Manage Employees”.
13. Employees are listed alphabetically by last name. Scroll down to the employee or employees you wish to enroll, checking the box on the left for each employee to be enrolled. Multiple employees can be enrolled simultaneously.
14. Check the Base Plan and Plan Level for each employee to be enrolled. These two columns indicated the membership in which the employee will be enrolled unless the information is changed. If any changes are needed, click the “Edit” link to the left of their name.
    - EC = Essential Care, PC = Primary Care, OC = Optimal Care
    - EO = Employee Only, ES = Employee Spouse, EC = Employee Child, EF = Employee Family
15. Once the appropriate box(es) has been checked, scroll to the top or bottom and use the dropdown menu to select “Enroll”, then click “Apply”.
16. The “Pending Enrollments” page will list each employee to be enrolled at the top.
17. Fill in all fields for both billing and physical address of the company. This information will remain in place for all future enrollments until it is changed.
18. Review your order. The product section will display the membership, monthly cost and email address of each employee being enrolled.
19. Below that, a prorated charge for partial month membership will be displayed. Dues are charged on the first of every month.
20. Enter the credit/debit card information for payment, click the terms and condition box at the bottom and then click the “Complete Enrollment” button at the bottom.
21. The system will support the use of multiple cards to support billing to different business units.
22. Unless an error is identified, you will receive a confirmation page.
23. At this point, enrollment for all virtual healthcare services from Lyric Health is complete. The employee will receive emails from both Optimal teleHealth and Lyric with instructions for activating their Lyric account, adding medical history and family member information if appropriate.
24. For employees enrolling in Optimal Care, their emails will also include a link to an online form where they provide their dependent information. Upon submission of this information, Optimal teleHealth will forward it to Sedera. Sedera will contact the new member directly to complete the enrollment process.

New Enrollment

A quick way to enroll a new employee who may or may not be in the employee database is to use the "New Enrollment" button in the dashboard. This procedure does not send the employee a link to the orientation video and does not link to the Enrollment Preference Form. This procedure is typically used when the enrollment process is done immediately with the employee present. The Benefits Administrator must be in possession of all necessary information required for enrollment to utilize this procedure.

1. Login to the Benefits Administrator Dashboard and click the "New Enrollment" button.
2. From the New Member Enrollment page, the employee information can be pulled into the form from the employee database, if present there, by using the dropdown menu at the top of the page. If the employee is not in the database, manually enter all information into the fields on the form.
3. If for any reason you decide to not complete the enrollment using this form after entering employee information, use the "Reset Form" button at the bottom of the page to clear the data. If not, the data will still be there the next time you use the form.
4. Click "Submit" button, data will go into the employee database and a confirmation message will appear, then the "Finalize Enrollment" or checkout page will appear.
5. Fill in all fields for both billing and physical address of the company. This information will remain in place for all future enrollments until it is changed.
6. Review your order. The product section will display the membership, monthly cost and email address of each employee being enrolled.
7. Below that, a prorated charge for partial month membership will be displayed. Dues are charged on the first of every month.
8. Enter the credit/debit card information for payment, click the terms and condition box at the bottom and then click the "Complete Enrollment" button at the bottom.
9. The system will support the use of multiple cards to support billing to different business units.
10. Unless an error is identified, you will receive a confirmation page.
11. At this point, enrollment for all virtual healthcare services from Lyric Health is complete. The employee will receive emails from both Optimal teleHealth and Lyric with instructions for activating their Lyric account, adding medical history and family member information if appropriate.
12. For employees enrolling in Optimal Care, their emails will also include a link to an online form where they provide their dependent information. Upon submission of this information, Optimal teleHealth will forward it to Sedera. Sedera will contact the new member directly to complete the enrollment process.

Enrollment From Employee Database

The functionality of this procedure is almost identical to the previously described "New Enrollment" process in that the employee is not provided with a link to the orientation video or enrollment preference form. In fact, the employee information must already be present in the database. This process is most commonly used when enrolling an employee who had previously opted out of benefits or someone who wishes to change their membership type.

1. Login to the Benefits Administrator dashboard and click the "Manage Employees" button.
2. Employees are listed alphabetically by last name. Scroll down to the employee or employees you wish to enroll, checking the box on the left for each employee to be enrolled. Multiple employees can be enrolled simultaneously.
3. Check the Base Plan and Plan Level for each employee to be enrolled. These two columns indicated the membership in which the employee will be enrolled unless the information is changed. If any changes are needed, click the "Edit" link to the left of their name.
    a. EC = Essential Care, PC = Primary Care, OC = Optimal Care
    b. EO = Employee Only, ES = Employee Spouse, EC = Employee Child, EF = Employee Family
4. Once the appropriate box(es) has been checked, scroll to the top or bottom and use the dropdown menu to select "Enroll", then click "Apply".
5. The "Pending Enrollments" page will list each employee to be enrolled at the top.
6. Fill in all fields for both billing and physical address of the company. This information will remain in place for all future enrollments until it is changed.
7. Review your order. The product section will display the membership, monthly cost and email address of each employee being enrolled.
8. Below that, a prorated charge for partial month membership will be displayed. Dues are charged on the first of every month.
9. Enter the credit/debit card information for payment, click the terms and condition box at the bottom and then click the "Complete Enrollment" button at the bottom.
10. The system will support the use of multiple cards to support billing to different business units.
11. Unless an error is identified, you will receive a confirmation page.
12. At this point, enrollment for all virtual healthcare services from Lyric Health is complete. The employee will receive emails from both Optimal teleHealth and Lyric with instructions for activating their Lyric account, adding medical history and family member information if appropriate.
13. For employees enrolling in Optimal Care, their emails will also include a link to an online form where they provide their dependent information. Upon submission of this information, Optimal teleHealth will forward it to Sedera. Sedera will contact the new member directly to complete the enrollment process.

Add New Employee

Within the employee database (Manage Employees), there is a button at the top of the page titled “Add New Employee”. The purpose of this functionality is to provide the benefits administrator a way to add an employee to the database without enrolling the employee or initiating any correspondence to the employee.

1. Click “Add New Employee”.
2. Fill in the requested information on the page provided. Note, the form does not provide the ability to select a membership base plan or service level.
3. If you change your mind or wish to begin over, click the “Reset Form” button at the bottom and the form will clear. If you leave the form without clearing it, the information you input will still be in place.
4. Click “Submit” and you will return to the employee database page, and you will see the new employee is now listed. Their membership base plan and service level will be listed as “NA”.