Take Command

Administrator's Onboarding Guide

Welcome to your new HRA!

All of us at Take Command are glad you're here! We are focused on helping you take care of your employees. This guide is an overview on how to successfully complete Onboarding and what to expect with HRA administration.

This guide will be your roadmap, helping you:

- ✓ Complete HRA set-up
- ✓ Onboard your employees
- ✓ Perform key administrative activities

Helpful Note:

Look for boxes like this throughout this guide for links to additional resources - videos, documents, & pro-tips for Onboarding!

Have Questions at any time? Connect with the Take Command Team. We're happy to help!

Chat With Us

Chat on Take Command's website or member portal

Email Us

clientsuccess@takecommandhealth.com

Call Us

(214) 866-7757

1. Program Onboarding → **2.** Program Administration → **3.** Program Renewal & Open Enrollment

HRA Program Timeline

There are 3 main phases in the HRA Administration timeline. This guide focuses primarily on the first two phases, Program Onboarding & Program Administration.

For More Information:

Watch video 2 for a demo on how to complete the 3 steps below.

Program Onboarding

There are a few activities in the Onboarding Process. As an admin, you're responsible for completing the 3 steps below:

1. **Educate Employees.** Announce your HRA. We created a sample email & a flyer to make it easy for you, in addition to information in our Employee Resources Center.
2. **Approve your plan documents (customized for your program design).** To review & approve documents, verify your email address & log into your admin portal.
   Note approving documents triggers a welcome email to any employees you already added to your roster during set-up phase.
3. **Add employees to your roster.** Log into your admin portal & click "Employee Roster" on the left side. You can add employees manually or use the Employee Template file. Once added, employees will receive welcome emails (unless they are in a waiting period).

Pro-Tip:

Ensure you enter the correct hire date and assign employees to the correct class (multi-class ICHRA). If using the template file to upload, the data field in the "Class Name" column must match the formal name in the plan documents exactly. Be sure not to change column header names or add extra spaces in names or emails

Employee Onboarding- Shopping & Enrollment.

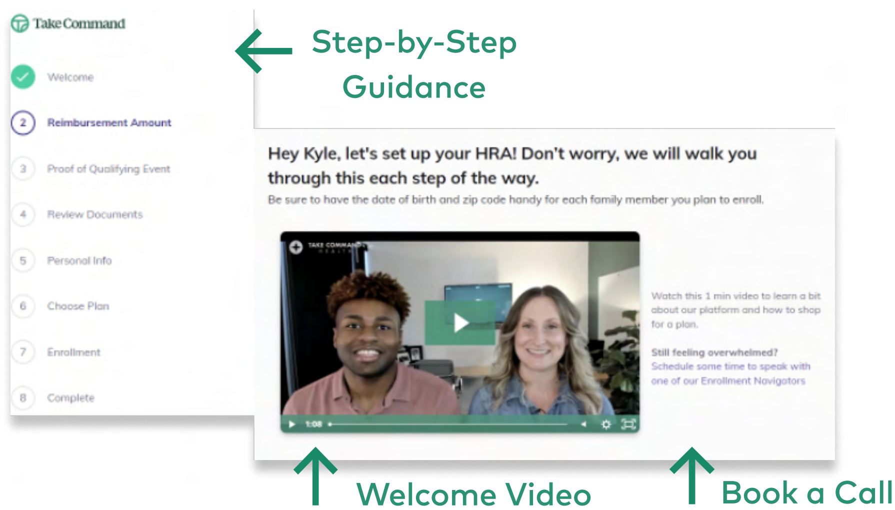
Your employees will be responsible for shopping for a plan and completing enrollment.
Once employees are added to your roster and they receive welcome emails, they have three options:

1. **Shop for a plan** on our platform using their monthly allowance. Our Enrollment team can help employees find a good plan if they want help. They can schedule an appointment on our Employee Resources page.
2. **Upload "proof of coverage"** (aka plan documents). Their monthly allowance can be used for an established, qualified plan if they already have one (including Medicare).
3. **Waive the benefit.** Our platform is an opt-out model, so fees are charged for all employees who don't waive.

For More Information:

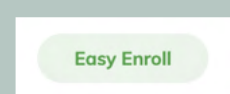
Our Employee Onboarding video highlights the employee onboarding & shopping experience on the Take Command platform.

Easy Employee Onboarding



Pro-Tip:

When shopping for a plan, employees can choose "Easy Enroll" plans (image shown to the right) which offer a great experience as they complete enrollment on our platform and Take Command does most of the work!



Important Onboarding Information:

Employees have 60 days from their HRA eligiblity date to purchase and enroll in a qualified health plan and participate in the HRA program. If they miss this window, they will need a Qualified Life Event (like moving to a new zip code, having a baby, getting married, etc.) in order to enroll in a plan or wait until the next Open Enrollment (Nov 1st with plans starting the following January).

Onboarding timing: The time involved for program set-up and onboarding can range. Employers new to benefits can set up an HRA and onboard in a few days while larger employers and those transitioning from group plans may take a little longer to avoid any gaps in coverage.

Program Administration

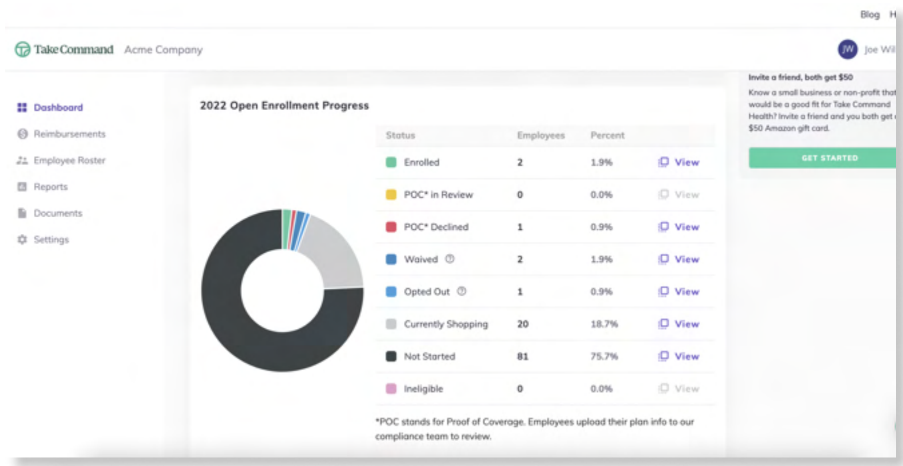
Once you and your employees have completed Onboarding, your focus will be ongoing program administration including the following activities:

- Employee reimbursement
- Employee roster management
- Employee insurance coverage
- Billing

For More Information:

Watch video 3 in our Admin Onboarding Series for more information on Program Administration and a demo on using your admin portal!

Your admin portal will be your hub for most of these activities. Log in and view your employer dashboard - you may have to toggle to it by clicking your name at the top right corner.



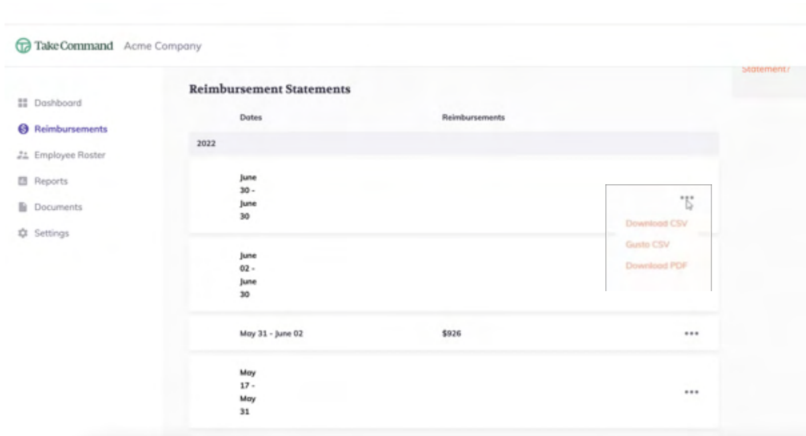
Employee Onboarding Status

In your portal you can view the status of your employees as they go through the onboarding process. You'll click "View" to see which employees are in each status.

Employee Reimbursement

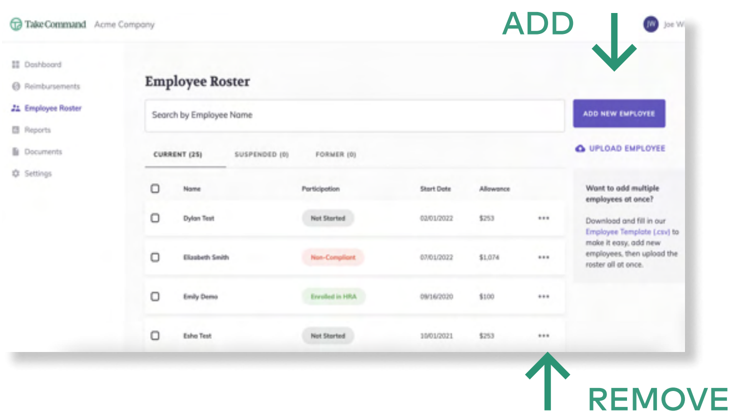
Click "Reimbursements" on the left side of your screen to see the reimbursement statements Take Command has generated for you. On this screen you can:

- **View and download** each month's statement as a pdf file.
- **Download the csv file** for each statement so you can upload it to your payroll platform. Just click the three dots to the right of each statement and select the csv file.
- **Change the date** on which you'd like to receive reimbursement statements. Click the "Update" button on the upper right of your screen



Roster Management

Click the "Employee Roster" tab on the left side of your screen. On this screen you can add new employees as well as remove employees.
**Remember that adding a new employee will trigger a welcome email to them from Take Command (unless you have a waiting period built into your HRA program).*



Other Settings

In your Setting tab, you can add administrators to your platform and update your payment method.

Employee Insurance Coverage

Once an employee has enrolled in an insurance plan, there are a few important tips to remember.

- Take Command is not an insurance company, but our passion is supporting employees participating in your HRA program.
- Insurance ID cards don't always arrive by the 1st of the month. That's OK! It doesn't mean an employee doesn't have coverage.
- The employee is the policy holder - we may direct them to their insurance company for specific policy or coverage questions.

Billing

Take Command administrative fees consist of a fixed monthly platform fee as well as a "PEPM" (per employee per month) fee. Fees payable to Take Command are separate from any health insurance payments and are billed on a monthly basis.

Take Command has an opt-out model where PEPM service fees are based on the number of employees still eligible to take advantage of the benefit, including participating employees as well as any who have not opted out/waived the benefit.

Thanks for trusting Take Command with your employee health benefits.
Check out our Admin resources for additional information!

Live Orientation Webinar

Join our Admin Onboarding webinar for HRA administrators.

Onboarding Video Series

Watch these videos for helpful overviews & demos of our platform.

Admin Resource Page

Everything you need, all in one place!