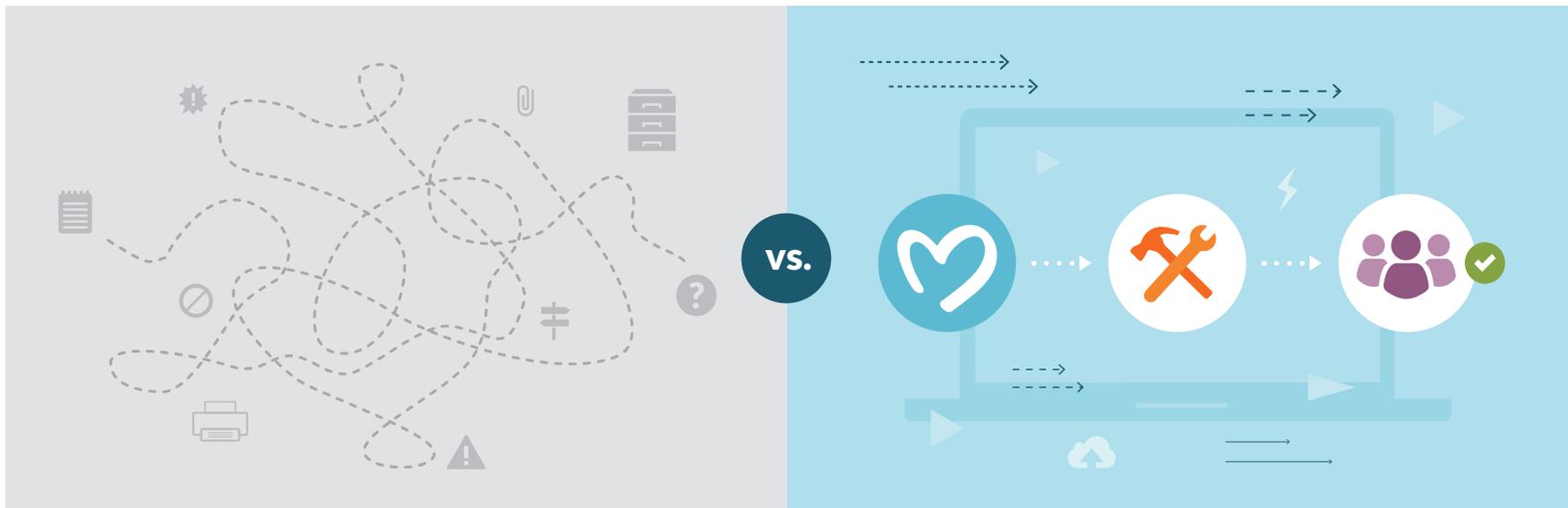


BEFORE VS. AFTER MAXWELL FOR EMPLOYERS

Today, you spend valuable time and energy mired in manual paperwork, myriad spreadsheets, and sending one-off emails to remind employees to turn in their enrollment forms or sign that employment document. Maxwell brings all of those scattered processes into one integrated technology solution designed to save you time and eliminate the potential for human error.



WHEN YOU ONBOARD A NEW HIRE:

Before Maxwell, you likely...

- ⚠️ Conduct in-person, real-time meetings to go through all required onboarding paperwork and answer any questions they have about benefits offered
- ⚠️ Email out a packet of forms that the new hire needs to complete

With Maxwell...

- ✔️ Onboarding is completed smoothly and successfully in a way that highlights your valuable benefits offering
- ✔️ You'll add new employee to the portal with their name and email address, kicking off an automated welcome email that prompts them to log in, enter personal info, enroll in benefits, and review any required employment documents

WHEN YOU ONBOARD A NEW HIRE *(continued)*:

Before Maxwell, you likely...

- ⚠ Require the employee to print those forms, complete them, and then bring them back to you
- ⚠ Painstakingly review those forms to make sure they're complete and legible
- ⚠ Go back to the employee for any missing or illegible information

With Maxwell...

- ✔ Forms are conveniently pre-populated and electronically signed via DocuSign, within the Maxwell workflow
- ✔ Document management makes it so that insurance plan and employment documents, like I9s, W4s, Direct Deposit Forms, and more, can be made available to employees throughout the year

WHEN YOU ENROLL A NEW HIRE IN THEIR BENEFITS:

Before Maxwell, you likely...

- ⚠ Ensure employee is aware of all the benefits available to them
- ⚠ Funnel insurance-specific questions you aren't sure of to your benefits advisor
- ⚠ Regularly check progress with enrollment tasks and remind new hires when their enrollment period is over

With Maxwell...

- ✔ Beautiful, simple enrollment experience makes it easy for employees to shop for benefits, totally paperlessly
- ✔ Employees can easily compare plans, review choices, and check out
- ✔ You save time not having to answer simple benefits questions and are compliant in terms of how you offer coverage and employee is on record acknowledging that coverage
- ✔ Dashboard and built-in communication tools allow you to see where employee is in enrollment process and send reminder emails

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- ⚠ Ensure all required information is captured accurately and legibly during the enrollment process, including items like their PCP, dependent Social Security #s, etc.

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- ✔ All required personal and demographic information is captured during enrollment experience

WHEN YOU ENROLL A NEW HIRE IN THEIR BENEFITS *(continued)*:

Before Maxwell, you likely...

- ⚠ Do not have an easy way to communicate the true value of employer-paid benefits
- ⚠ Do not have an easy way for employees to truly understand voluntary benefit offerings, and enroll in them
- ⚠ Require employee to review a complicated benefit summary that includes a rate table and a lot of fine print

- ⚠ Have trouble getting employees to enroll in and use and nontraditional products like telemedicine or other lifestyle/financial wellness benefits
- ⚠ Have a disjointed enrollment process or employees may not even be aware or remember the benefits are available

With Maxwell...

- ✔ Value of employer-paid benefits is made clear in the enrollment experience via product detail pages and on checkout screen, including employer and employee monthly cost
- ✔ Employee will click a dropdown, pick a voluntary product and coverage amount, and see their employee-specific rate populate automatically via a dynamic, real-time cost calculator

- ✔ Nontraditional benefits are presented in the same enrollment workflow as traditional benefits like medical, dental, and vision
- ✔ Employees have access to those benefits via the portal 24/7/365 after enrollment ends

WHEN YOU MANAGE MID-YEAR EMPLOYEE CHANGES:

Before Maxwell, you likely...

- ⚠ Find out that an employee has changed their personal demographic information directly with an insurance carrier or other vendor without letting you know, which means there is no central system of record
- ⚠ Have to figure out what an employee is enrolled in, what they're eligible to change based on enrolled products, re-send the right enrollment or change forms

With Maxwell...

- ✔ All employee changes can be made in Maxwell, reviewed and approved by you, and then sync over to carriers/vendors via built-in integrations or reporting capabilities, so you have a single source of truth for employee data

WHEN YOU SET UP AND KICK OFF ANNUAL OPEN ENROLLMENT:

Before Maxwell, you likely...

- ⚠ Prepare all benefit education materials including new hire packets, annual open enrollment presentations, etc.
- ⚠ Prepare all benefit enrollment materials including enrollment forms and instructions to complete and return, and distribute those either on paper or via email attachments
- ⚠ Email all employees in bulk to remind them to finish enrollment, potentially resulting in confusion on the part of those who have already completed their enrollment

With Maxwell...

- ✔ Use Maxwell's Open Enrollment tool to easily set up which plans are included in the Annual Open Enrollment
- ✔ Set up passive or active enrollment on a per-product basis by simply toggling a setting on the Open Enrollment tool on your Maxwell dashboard
- ✔ Send out an enrollment kickoff email from the Open Enrollment tool, that will take employees directly to their shopping experience
- ✔ Easily target subsequent reminder emails to just those who haven't completed through your Maxwell Dashboard

WHEN YOU MANAGE ANNUAL OPEN ENROLLMENT:

Before Maxwell, you likely...

- ⚠ Manually send enrollments to carriers by logging into all the different carrier portals for the benefits you offer
- ⚠ Manually track how many enrollments have been sent to carriers vs. those that haven't yet
- ⚠ Maintain matrix outlining how employee benefit offerings are split up by division, class, location, etc.
- ⚠ Make sure that an employee is only exposed to the benefits that they are eligible for based on the above

With Maxwell...

- ✔ All enrollment data can be automatically, accurately, and securely sent to your carriers via Electronic Data Interchange (EDI) feeds
- ✔ Don't stress about remembering complex benefits rules: only the benefits that are available to a particular employee are ever visible within the enrollment experience, thanks to support for complex eligibility groups and rules

WHEN YOU MANAGE ANNUAL OPEN ENROLLMENT *(continued)*:

Before Maxwell, you likely...

- ⚠ Log into every carrier portal to determine which employee is enrolled in which benefits
- ⚠ File away paper enrollment forms and benefit documents in filing cabinets or other means of storage
- ⚠ Manage documents and forms in multiple systems
- ⚠ Have hard copies of documents with employee Personal Health Information (PHI) stored in your physical office, potentially insecurely and accessible

With Maxwell...

- ✔ All enrolled data lives in one centralized place, and robust reporting makes it easy to see which products are enrolled, by whom, since when
- ✔ All finished paperwork, benefit documents, etc. are stored in the cloud and backed up hourly, with the ability for you to give specific HR team members access to that information
- ✔ All employee PHI is stored securely in Maxwell and only accessible by the persons who should have access

WHEN YOU TERMINATE AN EMPLOYEE:

Before Maxwell, you likely...

- ⚠ Log into every single carrier / vendor portal to check if that employee is enrolled, in order to terminate coverages, then terminate those coverages in the appropriate portals

With Maxwell...

- ✔ An employee terminated in Maxwell results in the enrolled coverages automatically terming as well