

**Springboard Marketplace®**

**Broker User Guide**

**for Small Group**

Desktop and Mobile URL:

**[www.springboardmarketplace.com](http://www.springboardmarketplace.com)**

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## Browser requirements

Springboard Marketplace® will support 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 39.0.2171.99 m and up

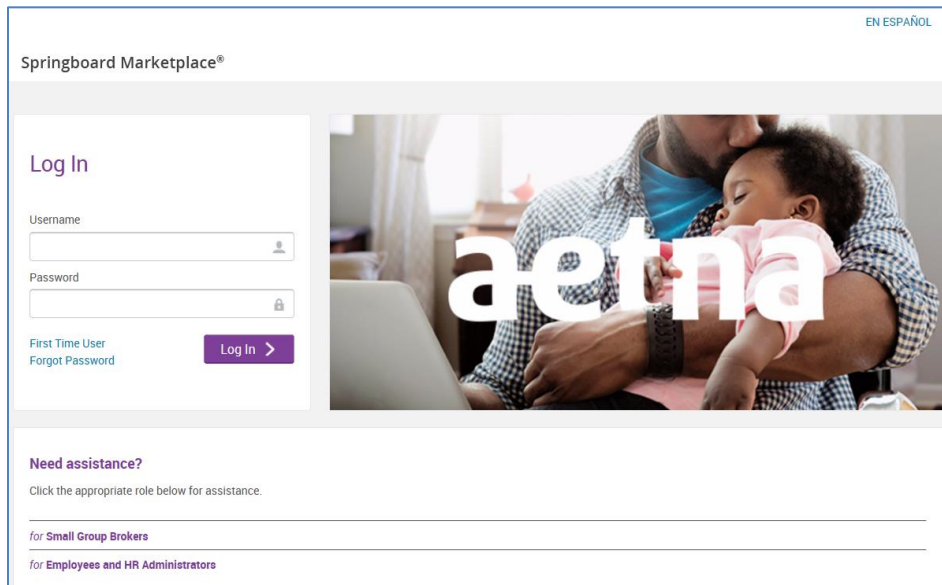
We encourage you to keep your browser updated.

You must have the following enabled:

- Cookies: OK
- JavaScript: OK
- Style Sheets: OK

## Springboard™ login

To begin, visit [www.springboardmarketplace.com](http://www.springboardmarketplace.com) and login by entering the Username and Password provided to you.

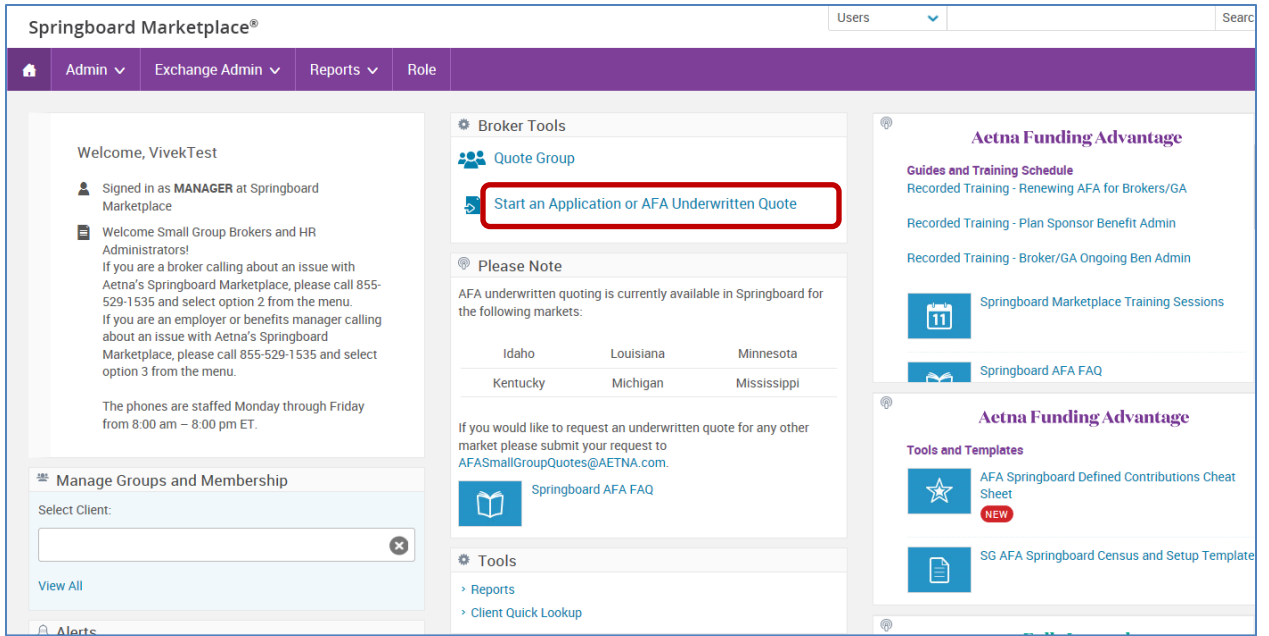
The image shows the Springboard Marketplace login page. At the top right, there is a link for "EN ESPAÑOL". The main heading is "Springboard Marketplace®". On the left, there is a "Log In" section with fields for "Username" and "Password", each with a small icon (a person for username, a lock for password). Below these fields are links for "First Time User" and "Forgot Password". A purple "Log In >" button is positioned to the right of the password field. To the right of the login form is a large image of a man holding a baby, with the "aetna" logo overlaid in white. Below the login form, there is a section titled "Need assistance?" with the instruction "Click the appropriate role below for assistance." and two links: "for Small Group Brokers" and "for Employee and HR Administrators".

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

Please note: Springboard Marketplace will "timeout" after 30 minutes of inactivity.

## Submitting a new group application

To enter group application and apply for coverage, click the "Start an Application or AFA Underwritten Quote" link on the home page.



Answer a few high level questions in order to move to the group application. Once completed, click the Next button

**Get Started!**

Please answer the questions below to start.

Please note: The state may not be available on this website at this time, and 15th of the month effective dates are not available for Self Funded groups. Please contact the Springboard Marketplace at 855-529-1535 for more information.

**A Few Quick Questions**

\* Would the group like to request a fully insured or self funded quote? Fully Insured

\* Company State

\* Company Zip

\* Total Number of Benefit Eligible Employees

\* Requested Effective Date 07/01/2018

**Next >**

## Completing the Employer Application

The first section of the application requests the business information. All fields marked with an asterisk\* are required fields. You must complete all required fields before the application can be saved. If you log out of the system before clicking the first save button, the information will not be available at next login. Some questions are dynamic; based on the answer provided, additional questions will display. Please note that this screen varies by state.

Springboard Marketplace®

For Assistance Call Us: 855-529-1535

Exit Application

CALIFORNIA SMALL GROUP BUSINESS

YOUR EMPLOYEES

GROUP ELECTIONS

California Small Group Business

Employer Application

For Group Coverage (1-100 Eligible Employees)

TO COMPLY WITH CALIFORNIA LAW WHENEVER THE TERM "SPOUSE" APPEARS IT SHALL BE CONSTRUED TO INCLUDE DOMESTIC PARTNER.

FOR MORE REGULATORY APPROVAL.

"Aetna" is a brand name used for products and services provided by one or more of the Aetna group of subsidiary companies. Life, Accidental Death & Personal Loss Coverage (AD&D ULT), Disability, Aetna Vision® Preferred plan, Aetna Indemnity, Aetna PPO Plan and Aetna HMO Plan are underwritten by Aetna Life Insurance Company. Aetna HMO Plan is underwritten by Aetna Health of California Inc. Dental plans are provided by Aetna Dental of California Inc. and Aetna Life Insurance Company. For Vision coverage, certain claims administration services are provided by First American Administrators, Inc. and certain network administration services are provided through Tykett Vision Care, LLC (Tykett®).

Tell us about your business.

Employer Information

Company Name (Legal Name)

DBA/Doing Business As (if applicable)

Street Address (PO Box not acceptable)

Company City

Company State

Company Zip

Is your billing address the same as your company address?

Yes

No

Go Green - online statements available. Activate access to your eBusiness account at [www.aetna.com/employers/register](http://www.aetna.com/employers/register) upon receipt of your approval letter.

Phone Number

Fax Number

Company Contact - Name and Title

Company Contact E-mail Address

Is your billing contact the same as your company contact?

Yes

No

How many employees are in your group?

Nature of Business

Company SIC Code

FIND CODE

Federal Tax ID Number

Date Business Established (Mo/Yr)

Employer Classification

Corporation

Non-Profit

Partnership

Self-Proprietor

LLC

L.P.

Other

Will the group be electing dental?

Yes

No

Will the dental plans be voluntary or contributory?

Voluntary

Contributory

Do you have any prior dental coverage?

No Prior Coverage

Prior Coverage of Preventive and Basic Services

Prior Coverage of Major Services

Prior Coverage of Major Services and Orthodontics

Prior Coverage of Preventive/Basic/Orthodontics

Requested Effective Date

12/01/2017

Business Eligibility

Is your company a subsidiary of another company, an affiliate of another company, or under common control with another company?

Yes

No

Does your company file state or federal taxes with another company(ies) on a combined or consolidated basis?

Yes

No

Are there any associated companies to be included that are commonly owned?

Yes

No

Are multiple companies or multiple addresses to be included under this plan?

Yes

No

Did you answer "Yes" to any of the prior Business Eligibility questions?

Yes

No

Is your company a branch of another company, or does your company have branch offices?

Yes

No

Are you currently a client company of a Professional Employer Organization (PEO)?

Yes

No

Participation

FTEs from Full-Time Employees

10

How many hours per week must your employees work to be eligible for coverage?

Number of employees eligible for coverage (excluding the minimum hours to be eligible for coverage)

Number of employees enrolling

## Broker/General Agent Selection

After entering all of the business information and clicking ‘Next’, the application will take you to the Producer Search page. Your information will pre-populate. If any additional brokers or general agency need to be added enter the name, NPN or Tax Id Number (TIN) in the search box and click on “Search”. You can search for the broker by first or last name. Springboard requires at least two letters of the last

Page 7

name to search for a broker. For a more accurate result, enter the broker's full last name. Locate the broker and click on "Select".

To add a General Agent or Agency, enter the name in the search box and click on "Search". Locate the correct entity and click on "Select".

Both the broker and Agency/General Agency databases are based on ProducerWorld profiles. If a producer or assistant does not have a ProducerWorld username, they will not be listed as an option for assignment.

Once you have completed producer assignments, click "Save and Continue".

### Producer Search

Using the search box below, please select your producer(s). Note: you can search for and select both an Agency and General Agent in this section. The NPN search below can be used for searching appointed producers only.

Producer

Search

Clear Search

☒ Broker ☒ Agency / General Agency

Agency / General Agency

NPN (Broker) / TIN (Agency)

Selected Broker(s)

Type	Producer	Agency / General Agency	Address	Remove
Broker	VivekTest KumarTest			

Back

Save and Continue >

The following page is the Your Employees page where you'll need to enter census information for the employees. A sample census template has been provided for convenience. To download the census template click on the blue hyperlink titled 'here'. Enter all required fields within the template. Once the data has been entered within the excel census template, highlight the information and copy. On the Your Employees page, click the 'Add data' icon and use the CTRL+V functionality to paste the data from the excel census template to the application.



## Uploading Employee Census/HR Access

Company Name: test

### Your Employees

Please provide information on all of your eligible employees, including any eligible waivers, to proceed with your application. Enter all of your eligible employees below.

### Add Your Eligible Population

You can cut and paste the data from Excel by highlighting the desired rows. To copy, use "CTRL + C". To paste in Springboard use "CTRL + V". Click [here](#) to download an example and template of the EE census.

Please be aware that for rating purposes there is a need to assume that at least two (2) employees are enrolling in medical plans. If you wish to offer stand-alone dental or vision products you will still have the ability to waive all medical plans later in the application process. For now, please select the "Employee Only" option from the Medical Tier dropdown of the Employee Census for at least two (2) of your employees.

	Relationship *	Employment Status *	First Name *	Last Name *	SSN	Date of Birth *	Gender *	Address Line 1 *	Address Line 2	City *	State *	Zip *	Work Zip
1													

After clicking 'Save and Continue', HR Admins can be designated from the employees loaded on the census. If you select an HR Admin, they'll have access to assist with administrative duties such as enrollment questions, running reports, etc. at the group level.

### Review & Apply Permissions

This step allows you to designate users with HR Access to perform administrative functions.

Grant HR Access:

1 of 4 checked

Select up to 2 users

☒ Select None

☒ Farrah Davidson (01/06/1965)

☐ Justin Eaton (01/09/1968)

☐ Nathan Fogg (01/13/1970)

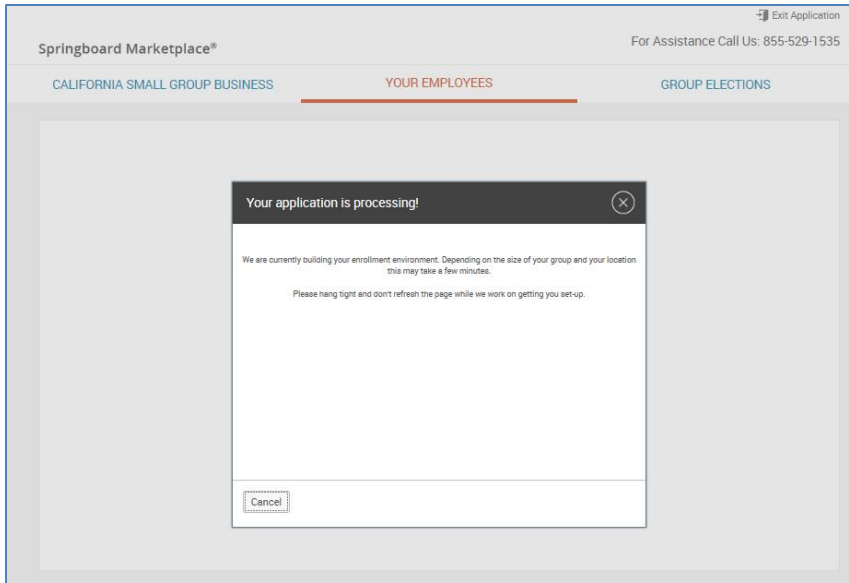
Submit Application

Language Assistance E

Русский | العربية | Kreyòl | Fr  
Nondiscrimination Notice

Click 'Submit Application' once complete.

(Once you submit the application, your group will begin to build within Springboard. While on the following screen please do not refresh your browser, close or cancel. This process may take a few minutes.)



## Initial Plan Selection

Once group build is complete you'll automatically be directed to the Group Elections page. On this page you'll be able to select plans (up to five) for the group. Plans will be grouped by benefit plan type. Plan details and premiums will also be available to review.

Company Name: Demo - Pacific Beach Bike Rentals

Please choose from the plan offerings below. Your employees will have the option of selecting coverage for any plans that you offer based on their overall eligibility.

### Your Plan Options

Medical and Pharmacy

Here are your medical plan offerings.  
Please note: You may only offer a maximum of 5 medical plans.

**Please note:** The rates displayed in this proposal only represent active member rates. Actual Cal COBRA member rates will be provided in the Continuation of Coverage Election packet sent to the member after enrollment.

[View all costs >](#)

**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.
- Please note that you must enroll in a medical plan to be eligible to enroll in a life insurance plan.

**Please note:** Note: Actual Cal COBRA member rates will be provided in the Continuation of Coverage Election packet sent to the member after enrollment and may differ from the rates displayed.

✓ Select all

✕ Deselect all

Show more detail

<input checked="" type="checkbox"/>	CA Brnz Svg Pls HDHP 4800 60/50 HSA Pln (01/17) Aetna Rx POS HSA	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	CA Bronze Basic HMO 6500 (01/17) Aetna HMO	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	CA Bronze HMO Deductible 6500 (01/17) Aetna HMO	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan
<input checked="" type="checkbox"/>	CA Bronze MC 4000 Copay (01/17) Aetna POS	<a href="#">view plan details &gt;</a>	<input type="checkbox"/> Compare Plan

## Defined contribution

Once you complete plan selections, you are taken to 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

Springboard will lead you through the appropriate screens, based on the type of strategy you're requesting. The most common strategy types are explained below.

## Common Defined Contribution Scenarios

### Percentage 100% across all tiers, all plans

Strategy: Percentage, 100% to each tier, and All Plans

In Springboard, select "Contribute to one benefit", Medical then Next

☐ Contribute a single lump sum for all benefits in strategy

☒ Contribute to one benefit

☒ Medical

☐ Dental

☐ Contribute different amounts per benefit

**Next >** Save & Exit Cancel

Select "I want to break out my contribution by plan type", "Contribute a percentage", then type the percentage into each tier field. Click next.

☐ I want to contribute a single lump sum  
 Monthly (\$0.00 per year)

☒ I want to break out my contribution by plan type.

☐ Contribute a flat dollar amount  
☒ Contribute a percentage

☐ I want to break out my contribution by plan.

☐ Contribute a flat dollar amount  
☐ Contribute a percentage

No rate bands built for this plan type

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
% <input type="text" value="100"/>	% <input type="text" value="100"/>	% <input type="text" value="100"/>	% <input type="text" value="100"/>

## Percentage less than 100%, all plans

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

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 by plan type”, “contribute a percentage”, and enter the tier percentages into their respective fields.

☐ I want to contribute a single lump sum  
 Monthly (\$0.00 per year)

☒ I want to break out my contribution by plan type.

☐ Contribute a flat dollar amount  
☒ Contribute a percentage

☐ I want to break out my contribution by plan.

☐ 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	% 75	% 75	% 75

**Note:** Springboard is calculating the true tier cost behind the scenes. If you click view costs, you will see the ER contribution dollars equal the appropriate calculation (percentage of EE tier plus the tier percentage of the difference in the EE and tier cost).

Select no and click 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 click 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

Click save.

Save Defined Contributions

✓ Save

Cancel

## Percentage per medical plan

Strategy: Contribution by plan, percentage, and a different amount per plan:

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 additional money for 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 by plan”, “Contribute a percentage”. Enter the requested tier amount for each plan. Click next.

☒ I want to break out my contribution by plan.

☐ Contribute a flat dollar amount

☒ Contribute a percentage

No rate bands built for this plan

Plan	Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
AFA KS Freeman Pref CPOSII 100/50 500D CY	% 80	% 50	% 50	% 50
AFA KS Freeman Pref CPOSII 2500 HSA 100/80 CY	% 70	% 50	% 50	% 50
AFA KS Freeman Pref CPOSII 5000 100/80IntRXCY	% 60	% 50	% 50	% 50
AFA KS Freeman Pref CPOSII 6750 100/80IntRXCY	% 50	% 50	% 50	% 50

Next >

Save & Exit

Cancel

View Costs

**Note:** Springboard is calculating the true tier cost behind the scenes. If you click view costs, you will see the ER contribution dollars equal the appropriate calculation (percentage of EE tier plus the tier percentage of the difference in the EE and tier cost)

Select no and click 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.

[i How does this work?](#)

Do you want to contribute additional money?

☐ Yes

☒ No

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

Select no and click 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](#)

Click save.

### Save Defined Contributions

[✓ Save](#) [Cancel](#)



## Dollar amount per medical plan

Strategy: Contribution by plan, dollar amount, and a different amount per plan:

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 additional money for 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 by plan”, “Contribute a flat dollar amount”. Enter the requested tier amount for each plan. Click next.

☐ I want to break out my contribution by plan type.

☐ Contribute a flat dollar amount

☐ Contribute a percentage

☒ I want to break out my contribution by plan.

☒ Contribute a flat dollar amount

☐ Contribute a percentage

No rate bands built for this plan

Plan	Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
AFA KS Freeman Pref CPOSII 100/50 500D CY	\$ 300	\$ 500	\$ 500	\$ 500
AFA KS Freeman Pref CPOSII 2500 HSA 100/80 CY	\$ 500	\$ 750	\$ 750	\$ 750
AFA KS Freeman Pref CPOSII 5000 100/80IntRXCY	\$ 400	\$ 600	\$ 600	\$ 600
AFA KS Freeman Pref CPOSII 6750 100/80IntRXCY	\$ 600	\$ 800	\$ 800	\$ 800


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

Select no and click 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 click 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](#)

Click save.

### Save Defined Contributions

[✔ Save](#) [Cancel](#)

## Percentage to base plan

Strategy: Percentage, base plan, and base plan name:

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 additional money for 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 by plan” and “Contribute a percentage”. Enter the requested tier amounts in the base plan line.

☐ I want to contribute a single lump sum

Monthly (\$0.00 per year)

☐ I want to break out my contribution by plan type.

☐ Contribute a flat dollar amount

☐ Contribute a percentage

☒ I want to break out my contribution by plan.

☐ Contribute a flat dollar amount

☒ Contribute a percentage

No rate bands built for this plan

Plan	Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
AFA Choice POS II 2000 100/70 CY	% <input type="text" value="100"/>	% <input type="text" value="50"/>	% <input type="text" value="50"/>	% <input type="text" value="50"/>
AFA Choice POS II 6250 HSA 100/50 Emb CY	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>

Click view costs.

No rate bands built for this plan

Plan	Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
AFA Choice POS II 2000 100/70 CY	% <input type="text" value="100"/>	% <input type="text" value="50"/>	% <input type="text" value="50"/>	% <input type="text" value="50"/>
AFA Choice POS II 6250 HSA 100/50 Emb CY	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>	% <input type="text"/>

Next >

Save & Exit

Cancel

View Costs

Record the ER cost for each tier. Springboard has calculated the true tier percentage.

Plans	Class	Carrier	Type	HSA Eligible	Deductible	Coinsurance	Age range	Tier	Premium	EE Cost	ER Cost
▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼
AFA Choice POS II 2000 100/70 CY	Employee	Aetna	POS	No	\$2,000.00	0%	0-999	Employee	\$442.27	\$0.00	\$442.27
AFA Choice POS II 2000 100/70 CY	Employee	Aetna	POS	No	\$2,000.00	0%	0-999	Employee + Spouse	\$1,037.32	\$297.53	\$739.80
AFA Choice POS II 2000 100/70 CY	Employee	Aetna	POS	No	\$2,000.00	0%	0-999	Employee + Child(ren)	\$962.94	\$260.34	\$702.61
AFA Choice POS II 2000 100/70 CY	Employee	Aetna	POS	No	\$2,000.00	0%	0-999	Employee + Family	\$1,508.36	\$533.05	\$975.32
AFA Choice POS II 6250 HSA 100/50 Emb CY	Employee	Aetna	POS	Yes	\$6,250.00	0%	0-999	Employee	\$271.87	\$271.87	\$0.00
AFA Choice POS II 6250 HSA 100/50 Emb CY	Employee	Aetna	POS	Yes	\$6,250.00	0%	0-999	Employee + Spouse	\$637.68	\$637.68	\$0.00
AFA Choice POS II 6250 HSA 100/50 Emb CY	Employee	Aetna	POS	Yes	\$6,250.00	0%	0-999	Employee + Child(ren)	\$591.95	\$591.95	\$0.00
AFA Choice POS II 6250 HSA 100/50 Emb CY	Employee	Aetna	POS	Yes	\$6,250.00	0%	0-999	Employee + Family	\$927.25	\$927.25	\$0.00

## Dollar amount across all tiers, all plans

Strategy: Dollar amount to each tier, and All Plans

Click “I want to break out my contribution by plan type”, “Contribute a flat dollar amount”. Enter the recorded tiers from the view cost screen into their respective tiers. Click next.

☐ I want to contribute a single lump sum

Monthly (\$0.00 per year)

☒ I want to break out my contribution by plan type.

☒ Contribute a flat dollar amount

☐ Contribute a percentage

☐ I want to break out my contribution by plan.

☐ Contribute a flat dollar amount

☐ Contribute a percentage

No rate bands built for this plan type

Percent Calculator ⓘ  

Select Plan ▼

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
\$ 442.27	\$ 739.80	\$ 702.61	\$ 975.32

Next >

Save & Exit

Cancel

View Costs

Select no and click 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 click 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](#)

Click save.

Save Defined Contributions

**✓ Save** [Cancel](#)

## Dollar amount across all plans

Strategy: Dollar Amount and all plans.

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.

**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 by plan type”, “contribute a flat dollar amount”, and enter the requested amount in each tier. Click next.

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

---

No rate bands built for this plan type

Percent Calculator ⓘ

Select Plan ▼

Employee	Employee + Spouse	Employee + Child(ren)	Employee + Family
\$ 250	\$ 375	\$ 375	\$ 375

Select no and click 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 click 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

Click save.

Save Defined Contributions

✔ Save

Cancel

## Single lump sum

Strategy: Single lump sum for all benefits

Select “Contribute a single lump sum for all benefits in strategy” 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 (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 click 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, click 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

Click 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

1. 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."
2. 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." If you'd prefer no email is sent to each employee, select "No, do not send an email notification."

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 >

- i. Confirm if you would like to send an open enrollment notification to all employees.
  - a) If you elect to send an open enrollment notification a pop-up window will appear requesting you to confirm the text for the enrollment and all of the applicable employees. If you wish to include the usernames for each member to help login to the system, check the box 'Include Username'.

Your Open Enrollment Email

Email From: no-reply@bswift.com

Email Subject: Log in to enroll in your benefits!

Email Text:

Your Open Enrollment has started. Please login to begin your enrollment by going to SpringboardMarketplace.com.

You will need to enter your User Name and Password to login. The default password is your date of birth in this format MMDDYYYY.

If you don't know your User Name, please contact the Springboard Marketplace call center for assistance at 1-855-529-1618. If you have forgotten your password, click the "Forgot Password" link on the login page, or contact the Springboard Marketplace call center.

☒ Include username

Your Employees

The employees below will receive an email notification letting them know they can log in and enroll in their benefits. If an employee is listed without an email address that means we don't have one on file. Employees without an e-mail address can still log in and enroll.

First Name	Last Name	Email Address
Andrew	Anderson	aanderson@gatest1.com
Christopher	Brown	cbrown@gatest1.com
Debra	Cesare	dcesare@gatest1.com
Farrah	Davidson	fdavidson@txnn.com
Justin	Eaton	jeaton@txnn.com
Nathan	Fogg	nfogg@txnn.com

Save Export Employees

Cancel

- b) If you elect to not send an open enrollment notification you will receive confirmation the application is complete and to continue to the group site by clicking on 'Manage Users and Enrollment'.

## 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

Member shopping 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 member shopping. This email will provide instructions for logging in to Springboard.

Members use the same log in page as brokers and HR administrators – [springboardmarketplace.com](http://springboardmarketplace.com). If employees misplace the email, they can go to [www.springboardmarketplace.com](http://www.springboardmarketplace.com) and click on the "First Time User" link and select the "Employee" button. If an employee or HR administrator has logged in to Springboard before but can't remember their password, direct them to the "Forgot Password" link on the Springboard homepage. If they can't remember their username, they can call the Springboard Helpdesk at 855-529-1535 and select option 3.

Springboard Marketplace®

EN ESPAÑOL

**Log In**

Username

Password

First Time User  
Forgot Password

Log In >

**aetna**

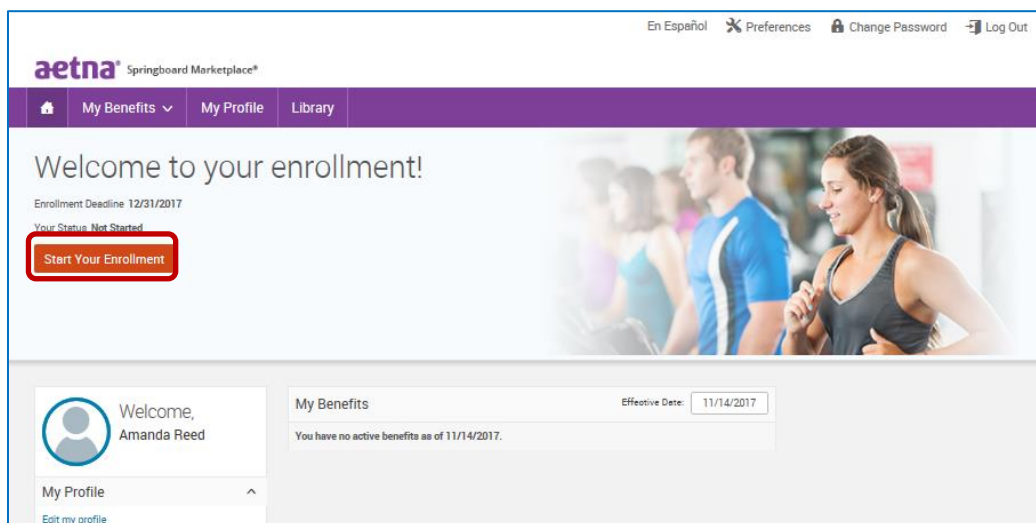
**Need assistance?**

Click the appropriate role below for assistance.

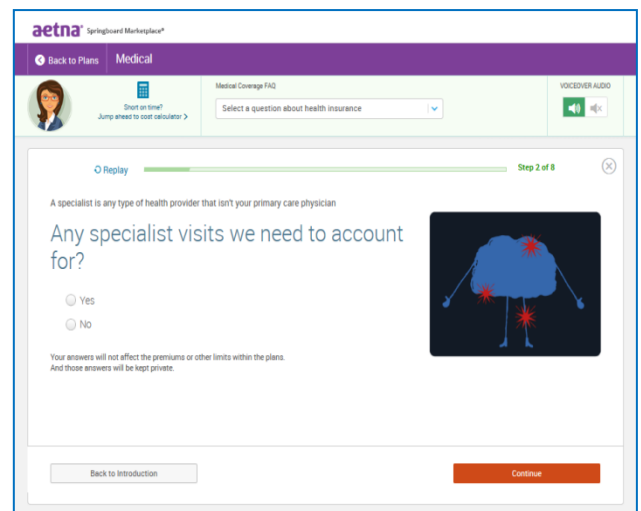
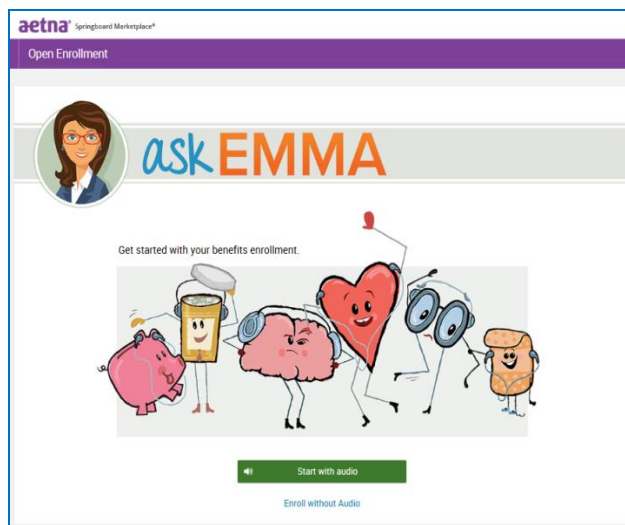
for Small Group Brokers

for Employees and HR Administrators ←

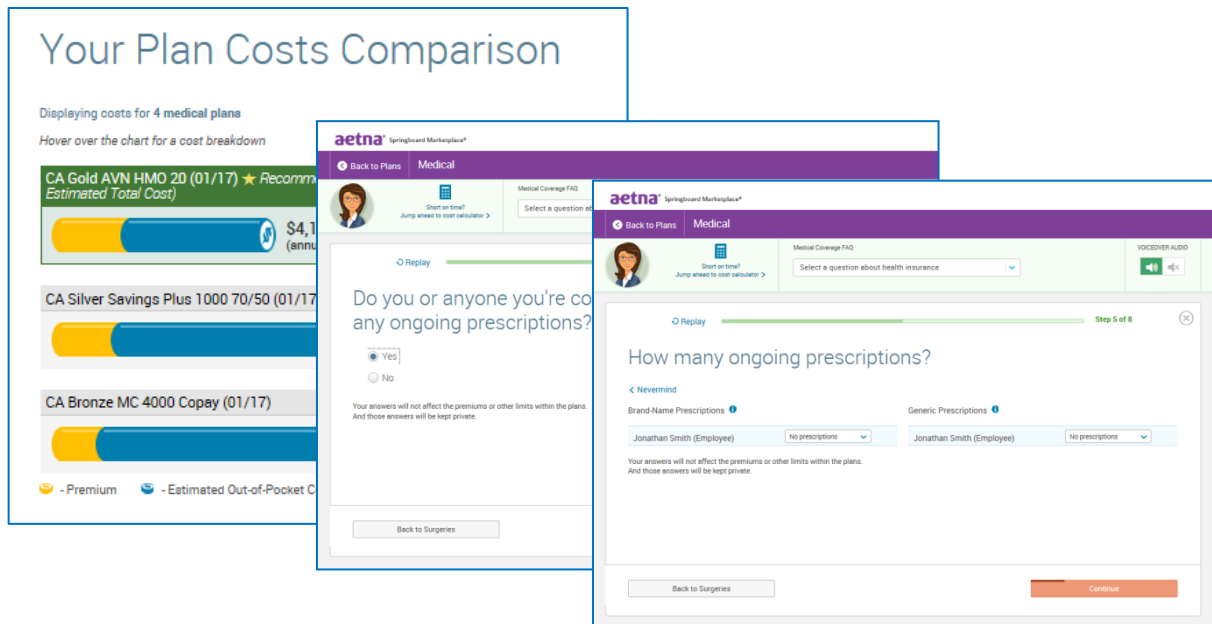
1. After logging in, employees can start their enrollment by selecting “Start Your Enrollment”.



2. 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.



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



- 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 VOICEOVER AUDIO

Who will be covered by this plan?  
Amanda Reed (Employee) Add Dependents

Plan	Annual Premium	Estimated Annual Out-of-Pocket Spending	Your Estimated Annual Total Cost	Annual In-Network Maximum Cost
CA Gold AVN HMO 20 (01/17) Aetna HMO DEDUCTIBLE: Individual: \$0, Family: \$0 OUT-OF-POCKET MAX: Individual: \$7,000, Family: \$14,000 CO-INSURANCE: 0% View plan details Compare Your Cost per month: \$124.47 Tier: Employee BenefitBucks: \$632.33 \$497.86 Select	\$1,493.64	\$2,660	\$4,153.64	\$8,493.64
CA Gold HMO 20 (01/17) Aetna HMO DEDUCTIBLE: Individual: \$0, Family: \$0 OUT-OF-POCKET MAX: Individual: \$7,000, Family: \$14,000 CO-INSURANCE: 0% View plan details Compare Your Cost per month: \$160.81 Tier: Employee BenefitBucks: \$643.23 \$684.04 Select	\$1,929.72	\$2,660	\$4,589.72	\$8,929.72
CA Bronze MC 4000 Copay (01/17) Aetna POS DEDUCTIBLE: Individual: \$4,000, Family: \$8,000 OUT-OF-POCKET MAX: Individual: \$7,190, Family: \$14,300 CO-INSURANCE: 0% View plan details Compare Your Cost per month: \$91.12 Tier: Employee BenefitBucks: \$364.48 \$455.60 Select				

Based on your answers, we recommend this plan. Why?

EXPLAIN THESE COSTS EXPLAIN THIS PLAN

If member is selecting a plan that requires a Primary Care Selection they will be prompted to input the Provider Number. (A provider search is available to search for their PCP)

Medical

[Provider Website →](#)

Amanda Reed, Employee

Primary Physician:

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

**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 **\$124.47** Per Month

**Medical\*** Your cost per month **\$124.47**

CA Gold AVN HMO 20 (01/17) Aetna  
Coverage: Employee

Cost Details Per Month

Total Premium	\$622.33
Employer Contribution	(\$497.86)
Your Cost	\$124.47

Who will be covered on this plan:

Name	Relationship	Coverage
Amanda Reed	Employee	<span>Cover</span>

[Edit Selection](#)

Once You've Reviewed All Your Selections:

Participation

**Conditions of Enrollment**

NOTICE: California law prohibits an HIV test from being required or used by health insurance companies as a condition of obtaining health insurance coverage.

On behalf of myself and the dependents listed, I agree to or with the following:

1. I acknowledge that by enrolling in the following plans, coverage is provided by the following entities (collectively referred to as "Aetna"):

**Complete Enrollment**

1 Your Info  
2 Your Benefits  
3 Enroll  
4 Complete

## Enroll Tool

The “Enroll Tool” allows you enroll employees and their dependents outside the open enrollment window. This option bypasses demographic data and other additional steps that are required when

using “[Impersonate User](#)”. You can use the Enroll Tool 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. The information entered into Springboard Marketplace must 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 Enroll a member using the “Enroll Tool”:

Pull up your group in the Manage Groups and Membership section in the middle of your homepage.  
(See section: [Finding a Specific Group](#))

Quote	Quoted On	Remove
Kentucky ID Test	3/20/2018	X
Test Demo KY Test ABC	3/14/2018	X

Click on the *Manage Users* link under your group name.

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

Use the search bar to find and select the employee you need to make enrollment changes for.

Search for an Existing User or Add a New User

Search

Advanced Search

Search Reset Fields + Add a New User

On the left side of the screen click on the Benefit Coverages link. Select “Enroll” feature that appears under Benefit Coverages.

Benefit Coverages

Enroll

Eligibility/Credit Questions

Plan Selection

Expanded Plan Selection

Make benefit elections for the employee based on the paper/digital copy of their enrollment form.

Click *Complete Enrollment* button and confirm elections to view, print or email confirmation statement.

Enrollment

New Member Added 1

**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 **\$298.61** Per Month

Medical\* Your cost per month **\$258.39**

1 Your Benefits

2 Enroll

Review and Confirm

3 Complete

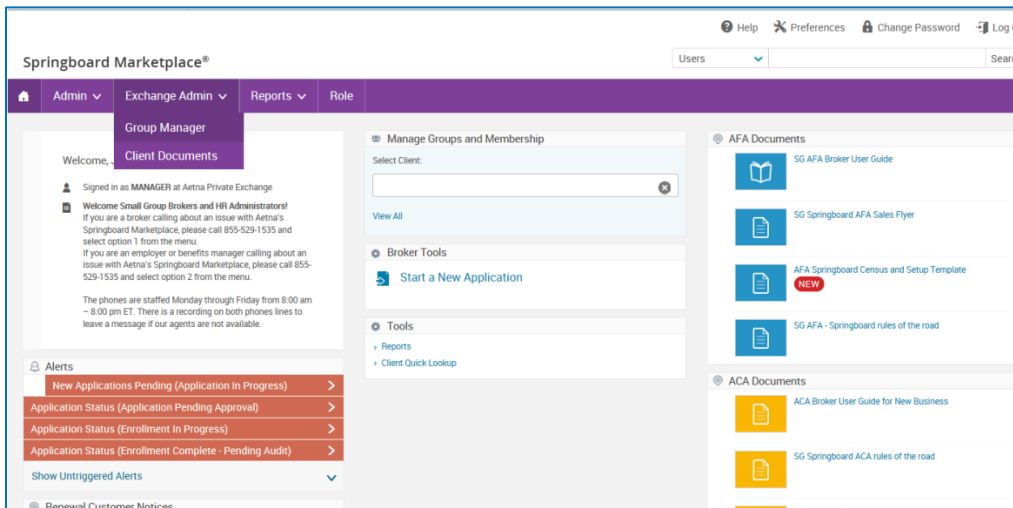
**Complete Enrollment**

Note: You can only make enrollment changes for an employee that has an active enrollment window (ex: new hire, life event, etc.). Go [here](#) for more information on Life Events.



## 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.

The screenshot shows the 'Group Manager' search interface. It includes a search bar with the text 'demo - norcross gym' and a 'Search' button. Below the search bar, there are fields for 'Group Number', 'Application Status', and 'Employer Application'. A table below the search bar lists search results. The first result is 'DEMO - Norcross Gym DBA George' with a status of 'Enrollment In Progress' and an effective exchange date of '8/1/2017'.

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”.

The screenshot shows the 'Group Information' page for the group 'DEMO - Norcross Donuts DBA Franks'. The page has four tabs: 'Group Information', 'Application Information', 'Benefits Information', and 'Billing Information'. The 'Group Information' tab is active, showing the group's status as 'Enrollment In Progress'. Below the status, there are two links: '> Review Application' and '> Continue Administrative Enrollment/End Enrollment'. A red arrow points to the second link.

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

On this page, confirm there is a check box next to each dependent that should have coverage.

Expand All Collapse All

Employee Allen, Barry ( age 30 , zip 30301 ) Manage Family Information

Medical ☒ Barry Allen Employee ☐ Ivory Allen Spouse ☐ Jade Allen Child

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

Group Quick Admin Enrollment

Expand All Collapse All

				PREMIUM (PER MONTH)
Employee	Brown, Samantha ( age 45 , zip 92108 )	Manage Family Information		\$622.33
Medical	<input checked="" type="checkbox"/> Samantha Brown Employee	PLAN	CA Gold AVN HMO 20 (01/17)	\$622.33
			COVERAGE Employee	
Employee	Green, Brett ( age 45 , zip 92108 )	Manage Family Information		\$804.04
Medical	<input checked="" type="checkbox"/> Brett Green Employee	PLAN	Select Plan	\$804.04
			COVERAGE Employee	
Employee	Morrison, Sarah ( age 45 , zip 92108 )	Manage Family Information		-
Medical	<input checked="" type="checkbox"/> Sarah Morrison Employee	PLAN	Select Plan	-
			COVERAGE	

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

Group Quick Admin Enrollment

Expand All Collapse All

				PREMIUM (PER MONTH)
Employee	Brown, Samantha ( age 45 , zip 92108 )	Manage Family Information		\$622.33
Medical	<input checked="" type="checkbox"/> Samantha Brown Employee	PLAN	CA Gold AVN HMO 20 (01/17)	\$622.33
			COVERAGE Employee	
Employee	Green, Brett ( age 45 , zip 92108 )	Manage Family Information		\$804.04
Medical	<input checked="" type="checkbox"/> Brett Green Employee	PLAN	<div> <div>CA Gold AVN HMO 20 (01/17)</div> <div>CA Bronze MC 4000 Copay (01/17)</div> <div>CA Gold AVN HMO 20 (01/17)</div> <div>CA Gold HMO 20 (01/17)</div> <div>CA Silver Savings Plus 1000 70/50 (01/17)</div> </div>	\$804.04
			COVERAGE Employee	
Employee	Morrison, Sarah ( age 45 , zip 92108 )	Manage Family Information		-
Medical	<input checked="" type="checkbox"/> Sarah Morrison 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 Brown, Samantha ( age 45 , zip 92108 ) Manage Family Information

Medical ☒ Samantha Brown Employee

PLAN CA Gold AVN HMO 20 (01/17)

COVERAGE Employee \$622.33

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		PREMIUM (PER MONTH)	
Employee	Brown, Samantha ( age 45 , zip 92108 ) Manage Employee Information	Manage Family Information	\$622.33
Medical	Samantha Brown Employee	PLAN CA Gold AVN HMO 20 (01/17) <a href="#">Edit Primary Care Information</a>	COVERAGE Employee \$622.33

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 “Edit Employee Information” link.

## 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>Welcome Small Group Brokers and HR Administrators! 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>Welcome Small Group Brokers and HR Administrators! 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”.)

- 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".

<b>Carrie Smith</b>	
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

Blank search or search by employee's name.

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	

## Impersonating a user

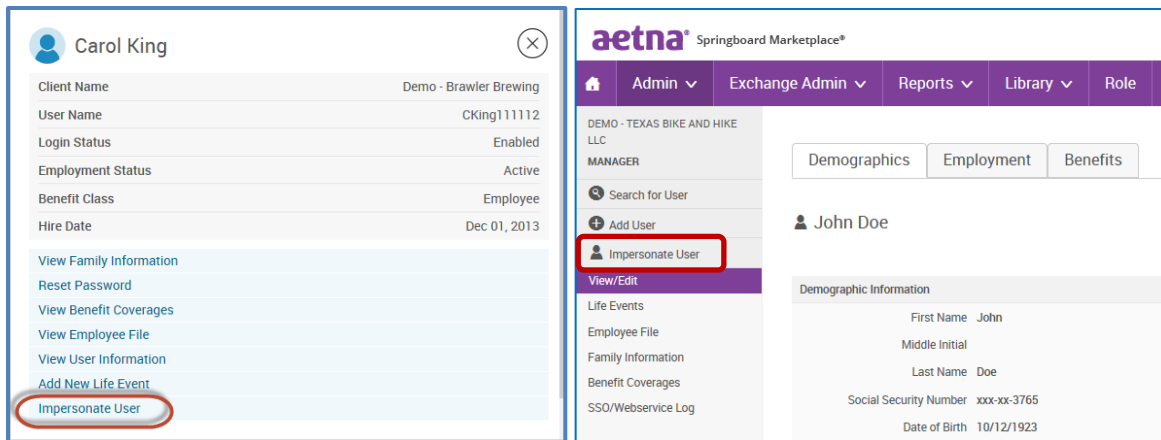
“Impersonate User” allows you to view the system through the eyes of the employee. The most common reason for this function is to process an enrollment on behalf of employees when they cannot access the system.

**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.

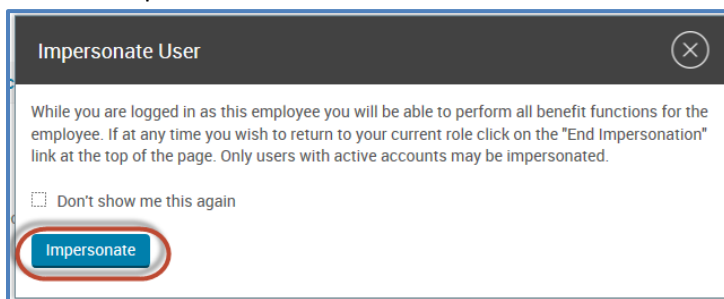
To impersonate:

1. Locate the employee within the Springboard Marketplace tool. (See section: [Searching for an Employee.](#))

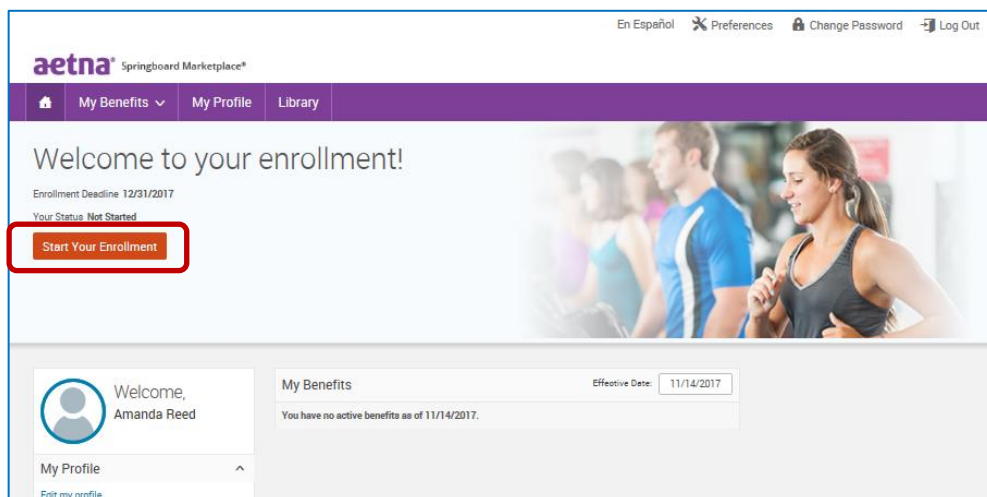
2. Select the “Impersonate User” link either from the search pop-up menu or from the employee’s profile.



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.

End Impersonation of Jimmie Johnson

En Español Exit Enrollment

**aetna** Springboard Marketplace\*

**Open Enrollment**

Let's get you signed up for your benefits!

Benefits FAQ

Select a question

VOICEOVER AUDIO

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.

**Medical**

NO PLAN SELECTED

\*Selection Required

I don't want this benefit (waive)

**View Plan Options**

**Basic Employee Life**

NO PLAN SELECTED

\*Selection Required

I don't want this benefit (waive)

**View Plan Options**

**1 Your Info**

**2 Your Benefits**

3 Enroll

4 Complete

Your Cost per month \$0.00

Remaining Balance

BenefitBucks \$469.13 per month

Explain how this works

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

**aetna** Springboard Marketplace\*

Back to Benefits **Medical**

Who will be covered by this plan?

☒ Jimmie Johnson Employee

**Add Dependents**

Back to Benefits

**Continue**

9. Once you’ve added and confirmed who the plan should cover, select “Continue” to go to the “Plan Selection” page. To enroll in the requested plan, select the “Select” button.

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

who will be covered by this plan?

☒ Amanda Reed (Employee) [Add Dependents](#)

CA Gold AVN HMO 20 (01/17) Aetna

HMO

DEDUCTIBLE: Individual: \$0 Family: \$0 OUT-OF-POCKET MAX: Individual: \$7,000 Family: \$14,000 CO-INSURANCE: 0% View plan details ☐ Compare

Your Cost per month: \$124.47 Tier: Employee BenefitBucks: \$487.86

Select

Provider Search Click here to search for a participating provider.

EXPLAIN THESE COSTS

ANNUAL PREMIUM	ESTIMATED ANNUAL OUT-OF-POCKET SPENDING	YOUR ESTIMATED ANNUAL TOTAL COST	ANNUAL IN-NETWORK MAXIMUM COST
\$1,493.64	\$2,660	\$4,153.64	\$8,493.64

Based on your answers, we recommend this plan. Why?

CA Gold HMO 20 (01/17) Aetna

HMO

DEDUCTIBLE: Individual: \$0 Family: \$0 OUT-OF-POCKET MAX: Individual: \$7,000 Family: \$14,000 CO-INSURANCE: 0% View plan details ☐ Compare

Your Cost per month: \$160.81 Tier: Employee BenefitBucks: \$543.33

Select

Provider Search Click here to search for a participating provider.

EXPLAIN THESE COSTS

ANNUAL PREMIUM	ESTIMATED ANNUAL OUT-OF-POCKET SPENDING	YOUR ESTIMATED ANNUAL TOTAL COST	ANNUAL IN-NETWORK MAXIMUM COST
\$1,929.72	\$2,660	\$4,589.72	\$8,929.72

EXPLAIN THIS PLAN

CA Bronze MC 4000 Copay (01/17) Aetna POS

DEDUCTIBLE: Individual: \$4,000 Family: \$8,000 OUT-OF-POCKET MAX: Individual: \$7,150 Family: \$14,300 CO-INSURANCE: 0% View plan details ☐ Compare

Your Cost per month: \$91.12 Tier: Employee BenefitBucks: \$354.49

Select

Provider Search Click here to search for a participating provider.

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.

aetna Springboard Marketplace® End Impersonation of Jimmie Johnson

Open Enrollment

Let's get you signed up for your benefit! Benefits FAQ Select a question VOICEDOVER AUDIO

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.

Medical \$52.12 Your Cost per month

PLAN AFA Choice POS II 2000 HSA 100/80 CY / Aetna / View plan details

COVERAGE Employee

Jimmie Johnson Employee ☒ Cover

☒ Completed [I don't want this benefit \(waive\)](#) [View Plan Options](#)

Basic Employee Life WAIVED

You have waived this benefit.

☒ Completed [View Plan Options](#)

1 Your Info

2 Your Benefits

3 Enroll

4 Complete

Your Cost per month \$52.12

Remaining Balance

BenefitBucks \$0.00 per month

Explain how this works

Finished selecting benefits? Click the button below to continue.

Continue

Not ready to complete your benefits enrollment? No problem, you can click the button below to save your progress and return later.

[Save and Finish Later](#)



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.

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 \$124.47**  
Per Month

**Medical\*** Your cost per month **\$124.47**

CA Gold AVN HMO 20 (01/17) Aetna  
Coverage: Employee

Who will be covered on this plan:

Name	Relationship	Coverage
Amanda Reed	Employee	Cover

Edit Selection

Cost Details Per Month

Total Premium	\$622.33
Employer Contribution	(\$497.86)
Your Cost	\$124.47

Once You've Reviewed All Your Selections:

Participation

**Conditions of Enrollment**

NOTICE: California law prohibits an HIV test from being required or used by health insurance companies as a condition of obtaining health insurance coverage.

On behalf of myself and the dependents listed, I agree to or with the following:

1. I acknowledge that by enrolling in the following plans, coverage is provided by the following entities (collectively, referred to as "Aetna").

1 Your Info  
2 Your Benefits  
3 Enroll  
4 Complete

**Complete Enrollment**

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

**aetna** Springboard Marketplace\*

My Benefits My Profile Library

**Your enrollment is complete!**

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

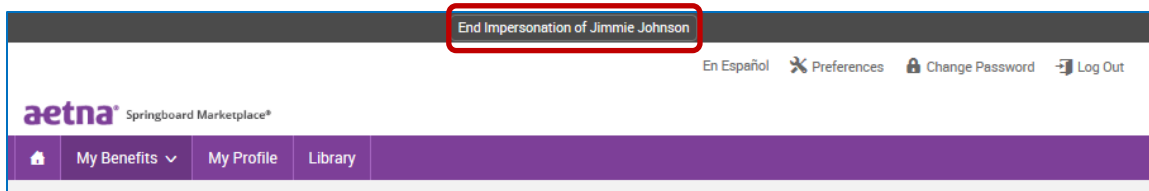
You are now eligible to make changes to your benefits. Be sure to add any eligible dependents in the Family Information section prior to beginning your enrollment. \*\*Final rates are based on final enrollment AFA benefits are Aetna administered, self-funded by your employer.

**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.

## Renewals

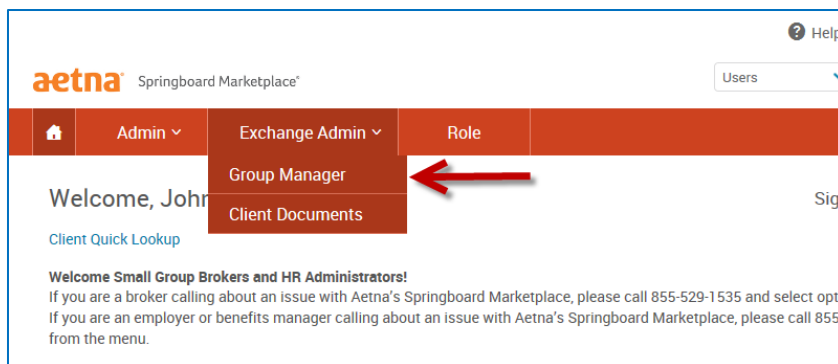
### Processing a Renewal Group

For Renewals, Aetna will take the information from the current systems and will feed it into Springboard. The information will come over exactly how it was the in the Aetna systems as the day the information was pulled over including all employee census information. The status of the group will be "Group Elections in Progress"

When the renewals get loaded into Springboard, there will be a few scenarios that may happen. The different scenarios and how to process each one are below;

#### 3. No Needed Changes

- a. When you get the information that your renewal group is now in the status of "Group elections in Progress," and there are no changes to be made to the renewal group because the elections that it defaulted to are all correct, then log in and make sure all employees are present and they have the right elected coverage showing.
  - i. To check to make sure all elections are correct and no changes or new members need added; click "Exchange Admin" and select "Group Manager" from the drop down. From there, search for you group and then click on the group name as it is a hyperlink.



**Group Manager**

Search for an Existing Employer Application or [Add a New Employer Application](#)

Group Name:  Exchange Effective Date:

Group Number:

Application Status:

Employer Application:

[Search](#) [Reset Fields](#) [Start a New Application](#)

[View All Applications](#)

Group Name	Group Number	Saved By	Saved On	Status	Process	Effective Exchange Date
Demo - Sunshine Yoga	999874264	Horley, Lauren	5/18/2017	Enrollment in Progress	Auto-Approval	7/1/2017

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

Privacy Policy | Accessibility Services | Nondiscrimination Notice | Browser Requirements

- ii. To confirm membership and employee count is correct, click “Continue Administrative Enrollment” and then verify all elections and employees/dependents are correct. Once verified and no changes need made, click the “End enrollment” button.

**Group Name:** Demo - Sunshine Yoga

[Group Information](#) [Application Information](#) [Benefits Information](#) [Billing Information](#)

**STATUS: Enrollment in Progress**

- [End Enrollment](#)
- [Review Application](#)
- [Continue Administrative Enrollment](#)

**Application Details**

Client Name: Demo - Sunshine Yoga

Original Applicant: Lauren Horley

Original Applicant Email: lahorley@aetna.com

Original Application On: 05/15/2017

Application Status: Enrollment in Progress

Upcoming Renewal Date:

Number of Employees per Application: 10

Included Forms: Signed signature page.pdf

Actual Number of Benefit Eligible Employees: 10

Employer Application: Aetna AZ

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

Privacy Policy | Accessibility Services | Nondiscrimination Notice | Browser Requirements

Group Employee Enrollment				
Expand All Collapse All				PREMIUM (PER MONTH)
Employee	Cornell, Christine (age 43, zip 06753)			\$1,291.00
Medical	PLAN AFA Choice POS II 2000 100/70 PY / Aetna	COVERAGE Employee + Family		\$1,291.00
Employee	Durden, Tyler (age 25, zip 06753)			\$459.00
Medical	PLAN AFA Choice POS II 2000 HSA 100/80 PY / Aetna	COVERAGE Employee		\$334.00
Dental	PLAN Option 10A PPO Max 1250 Ortho / Aetna	COVERAGE Employee		\$125.00
Employee	Dylan, Robert (age 44, zip 06753)			\$862.00
Medical	PLAN AFA Choice POS II 2000 100/70 PY / Aetna	COVERAGE Employee + Child(ren)		\$862.00
Employee	Jen, Tester (age 40, zip 15205)			\$634.00
Medical	PLAN AFA Choice POS II 1000 100/70 PY / Aetna	COVERAGE Employee / benefit pending		\$634.00
Employee	Kedis, Anthony (age 38, zip 06753)			\$459.00
Medical	PLAN AFA Choice POS II 2000 HSA 100/80 PY / Aetna	COVERAGE Employee		\$334.00

Dental	PLAN Option 10A PPO Max 1250 Ortho / Aetna	COVERAGE Employee		\$125.00
Employee	King, Carol (age 30, zip 06753)			\$1,391.00
Medical	PLAN AFA Choice POS II 1000 100/70 PY / Aetna	COVERAGE Employee + Family		\$1,391.00
Employee	Morrison, Jane (age 28, zip 06753)			\$1,391.00
Medical	PLAN AFA Choice POS II 1000 100/70 PY / Aetna	COVERAGE Employee + Family		\$1,391.00
Employee	Petty, Thomas (age 58, zip 06753)			\$634.00
Medical	PLAN AFA Choice POS II 1000 100/70 PY / Aetna	COVERAGE Employee		\$634.00
				Total Monthly Premium: \$7,121.00
End Enrollment		Return to Group Manager		

## 2. Groups with Plan Changes or Corrections

- When you receive the information that your renewal group is now in the status of "Enrollment in Progress," and there are needed changes to be made (different elections to newly offered plans, incorrect mapping, etc.) to the renewal group, there will be different actions you may need to take.
  - If a new employee needs added; please follow the steps in [Adding a New User Post Sale](#).
  - If the defaulting elections are wrong and need changed to a different benefit plan. Go to "Continue Administrative Enrollment" as described in Scenario 1, and then when the elections show on the screen, click on the pencil to edit the benefit coverage for that employee.

Group Employee Enrollment				
Expand All Collapse All				PREMIUM (PER MONTH)
Employee	Cornell, Christine ( age 43 , zip 06753 )			\$1,291.00
Medical	PLAN AFA Choice POS II 2000 100/70 PY / Aetna	COVERAGE Employee + Family		\$1,291.00
Employee	Durden, Tyler ( age 25 , zip 06753 )			\$459.00
Medical	PLAN AFA Choice POS II 2000 HSA 100/80 PY / Aetna	COVERAGE Employee		\$334.00
Dental	PLAN Option 10A PPO Max 1250 Ortho / Aetna	COVERAGE Employee		\$125.00
Employee	Dylan, Robert ( age 44 , zip 06753 )			\$862.00
Medical	PLAN AFA Choice POS II 2000 100/70 PY / Aetna	COVERAGE Employee + Child(ren)		\$862.00
Employee	Jen, Tester ( age 40 , zip 15205 )			\$634.00
Medical	PLAN AFA Choice POS II 1000 100/70 PY / Aetna	COVERAGE Employee / benefit pending		\$634.00
Employee	Kedia, Anthony ( age 38 , zip 06753 )			\$459.00
Medical	PLAN AFA Choice POS II 2000 HSA 100/80 PY / Aetna	COVERAGE Employee		\$334.00

- iii. Click on the pencil, follow the instructions [here](#). If those are the only changes needed and there is no need to add a new employee or add/remove dependents, or add a waiver; Go to the bottom of the “Group Employee Enrollment” screen and click the “End Enrollment” button. If there are more changes needed, see **Scenario**

### 3.

\*\*Please remember to always click the “End Enrollment” button when all changes are made to the group and employees.

End Enrollment

Return to Group Manager

### 3. Groups with New Employees, Waives, Dependents etc.

- a. When you get the information that your renewal group is now in the status of “Enrollment in Progress,” and there are needed changes to be made (different elections to newly offered plans, incorrect mapping, etc.) to the renewal group, complete the instructions in “**Groups with Plan Changes or Corrections.**” If there are new employees to add, employees to move to waiver status, or dependents dropping, it is addressed in this section.
- i. The steps for adding a new or missed employee to the renewal group are outlined in this section, [Adding an employee post sale](#).
- ii. If you need to remove coverage and instead waive an employee or waive coverage for a previously waived employee that did not map to “waive” in the renewal group, follow these steps to get to Administrative Enrollment shown in the section titled **No Needed Changes**. Click the pencil icon next to the person in the enrollment list as shown in **Groups with Plan Changes or Corrections**. When taken into the elections screens (as described in **Groups with Plan Changes or Corrections** or [here](#)), instead of electing or changing a plan, click on “I don’t want this benefit (waive)” and then choose the waive reason and hit button to “Save Answer” and then move through the screens a guided.

Let's get you signed up for your benefits!

Benefits FAQ  
Select a question

VOICEOVER AUDIO

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.

**Medical** \$841.00  
Your Cost per month

PLAN AFA Choice POS II 2000 100/70 PY / Aetna / [View plan details](#)

COVERAGE **Employee + Family**

Christine Cornell	Employee	<input checked="" type="checkbox"/> Cover
Justin Cornell	Spouse	<input checked="" type="checkbox"/> Cover
Peter Cornell	Child	<input checked="" type="checkbox"/> Cover
Marissa Cornell	Child	<input checked="" type="checkbox"/> Cover

☒ Completed

[I don't want this benefit \(waive\)](#) [View Plan Options](#)

**Dental** WAIVED

**Your Info**  
**Your Benefits**  
Enroll  
Complete

Your Cost per month \$841.00

**Remaining Balance**  
BenefitBucks \$0.00 per month  
[Explain how this works](#)

Finished selecting benefits? Click the button below to continue.

[Continue](#)

Please answer question(s) below:

Christine Cornell (Employee)  
MEDICAL

\*Select your reason for waiving medical coverage.

☐ Parental Coverage  
☐ COBRA Coverage  
☐ Retiree Coverage  
☐ Tricare  
☐ Medicare  
☐ Medicaid  
☐ VA Coverage

[Save Answers](#)

iii. Adding or removing a dependent can be done as well by the instructions by going to “Administrative Enrollment” as described in **No Needed Changes** and navigate to the enrollment screens as shown in **Groups with Plan Changes or Corrections** (or [here](#)). Once pass the demographics screen, you will see the screen below where a dependent can be added.

Tell me about your family.

Enter all family information before beginning your enrollment regardless of whether the family members are to be covered by your benefits or not. To do so, click Add Family Member. To verify or edit the information of a family member who has already been entered, click on the person's name. If you do not have any family members, click Continue.

**Robert Dylan**  
Male Employee  
44 years old (4/5/1972)  
SSN: 125-75-3256  
[Edit >](#)

**baby child**  
Male Child  
0 years old (3/21/2017)  
[Edit >](#)

[Add Dependents](#)

**Your Info**  
Employee Information  
**Family Info**  
Your Benefits  
Enroll  
Complete

[Continue](#)

Click on the “+” sign to add the new dependent. Then fill out the lines with (47\*) and continue through the screens to choose the benefits for the new dependent and move through all the needed screens.

- iv. If an employee needs terminated, please follow the instructions [here](#). If that terminated employee wants to elect COBRA, you can start that process [here](#).

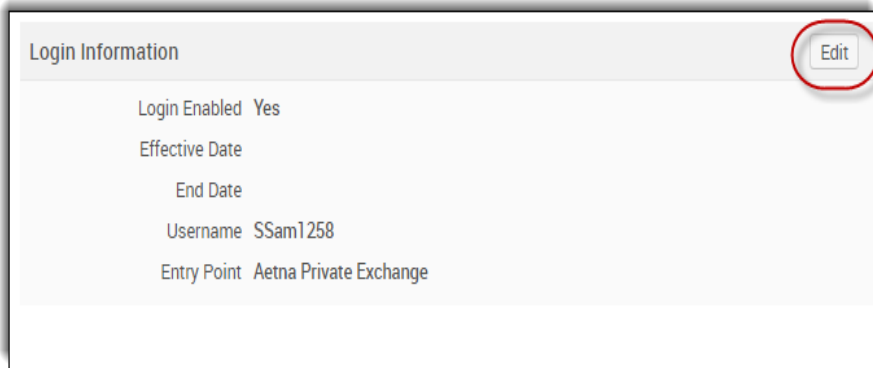
\*\*Please remember to always click the “End Enrollment” button when all changes are made to the group and employees.

End Enrollment Return to Group Manager

## Resetting an employee password

If an employee forgets his or her 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 **Login Enabled** field on the **View/Edit** page will be set to **No** under the **Login Information** section. If the employee has attempted to login but has not yet been locked out, a **-1** or **-2** will be next to **Login Enabled**. This means they have unsuccessfully tried to login once or twice. Note: Users get three login attempts until the system locks them out.
3. Click Edit next to **Login Information**.



The screenshot shows a web interface for 'Login Information'. It contains the following fields: 'Login Enabled' with the value 'Yes', 'Effective Date', 'End Date', 'Username' with the value 'SSam1258', and 'Entry Point' with the value 'Aetna Private Exchange'. In the top right corner of the form, there is a button labeled 'Edit', which is circled in red.


4. From the Login Information page:
  - a. **Login 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
- Reset Password to the default password:** Date of Birth (after clicking Save, the password is immediately reset)

\* Username

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    
  
☐ Reset Password via SMS to employee

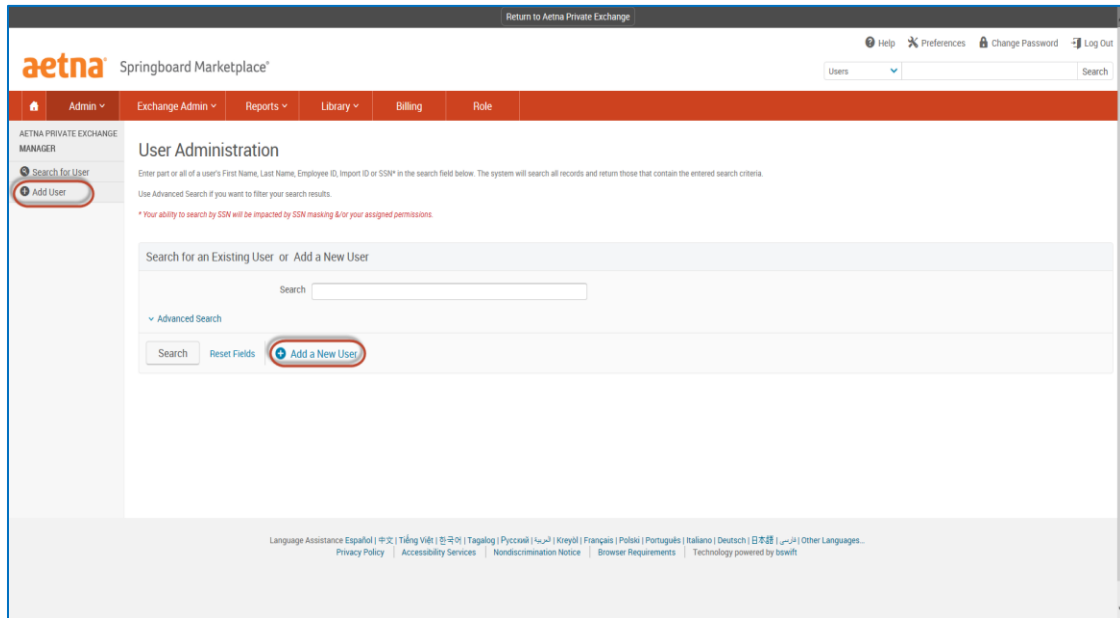
- Reset Password via email to Employee:** If the password is reset via email, from the drop down menu select the email address to which the password reset link will be sent. Once the employee receives and clicks the link, they will be asked to enter the last four digits of his or her Social Security Number. The employee will have three attempts to do so before being frozen out of the password reset process. If the correct four digits are entered, the employee will be able to enter and confirm a new password.
  - 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 after clicking on the 'Forgot Password' link on the login 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 his or her Social Security Number. The employee will have three attempts to do so before being frozen out of the password reset process.
- c. Click Save.



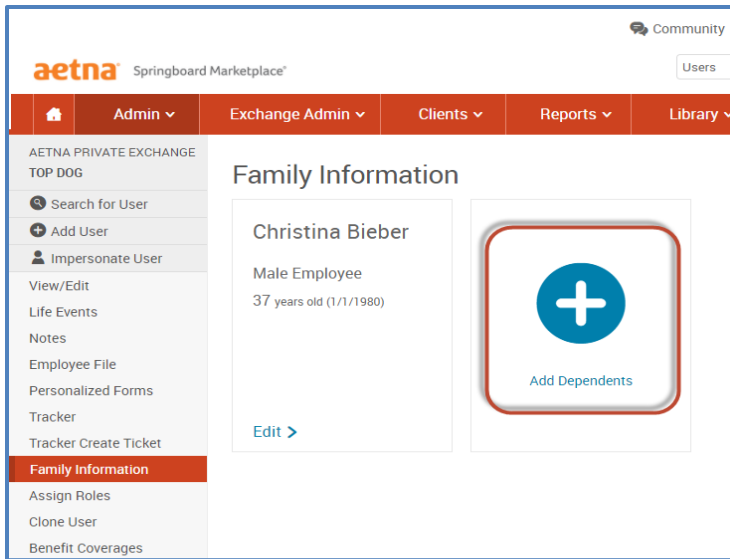
## Adding an employee post sale

If an employee needs to be added to the system after the initial application process, for example a new hire, you will be able to add them to the group site via User Admin.

1. To add a user, from the group site, click on Admin >> User Admin and select 'Add User' from either the left hand navigation tool bar or from the Search box.



2. Once on the Add a New User page, complete all necessary fields.
  - a. Fields marked with an \* are required.
3. After you have completed the Add a New User page, click Save to continue to the Family Information page.
  - a. If the family information 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, click on the 'Add Dependents' link and complete all required fields. Repeat for each dependent.



### Impersonate the user

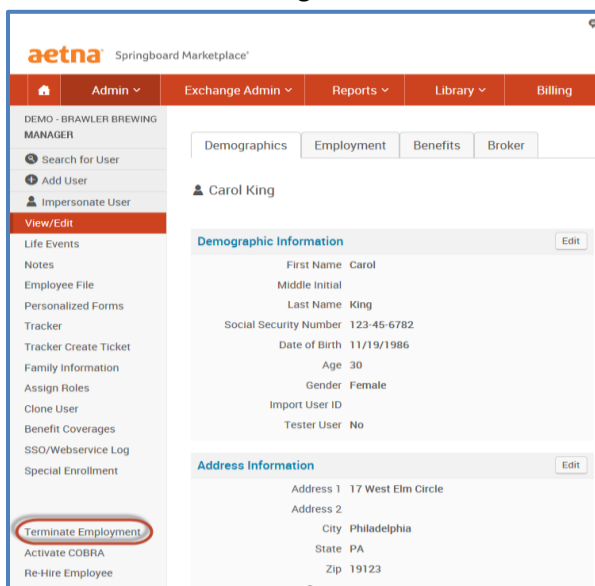
Then you must impersonate the user to elect the desired benefit coverages.

Please follow the steps [here](#).

## Terminating an employee

When an employee is terminated from **employment**, you will be able to 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, click the 'Terminate Employment' link located within the left hand navigation tool bar.



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

The screenshot shows the Aetna Springboard Marketplace interface. The top navigation bar includes 'Admin', 'Exchange Admin', 'Reports', 'Library', 'Billing', 'Connections', and 'Role'. The left sidebar lists various user management functions. The main content area is titled 'Casey Brown > Edit Employment Termination Information' and contains fields for 'Termination Reason' (a dropdown menu) and 'Termination Date' (a date input field with a placeholder '(mm/dd/yyyy)'). Below these fields are 'Save' and 'Cancel' buttons. A 'Terminate Employment' button is located at the bottom left of the sidebar.

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

## Finding a specific group

If you are interested in reviewing group level information, such as employee enrollment information, adding a new hire, or updating employee address information, you will navigate to the employer group site.

1. To locate and review a specific employer group, from the Springboard Marketplace homepage, enter the group name or group number in the search box under Manage Groups.

The screenshot shows a search interface titled 'Manage Groups and Membership'. It features a 'Select Client:' label above a text input field. A 'View All' link is positioned below the input field.

2. Click on 'Navigate to Group' to access the group site.

Manage Groups and Membership

Select Client:

Broker Quote

View All

Manage Group

Broker Quote

Group Number	861308
Status	Group Elections In Progress
Termination Date	Dec 31, 9999
Address	123 Main St New York, NY 10001
Employee Count	2
Balance	N/A

> Run a Report

> Manage Users

> Review Application

> View All Client Documents

> **Navigate to Group**

## Admin homepage/broker tools

The Admin homepage will be available at both the parent site and the child site. At the parent site level, you will be able to search for your employer groups via the Manage Groups and Membership tab, manage quotes, review alerts as well as quote a group and submit an application.

- 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 clicking on the 'Navigate to Group' link.

Manage Groups and Membership

Select Client:

Sample Group

View All

Manage Group

Sample Group

Group Number	861316
Status	Enrollment In Progress
Termination Date	Dec 31, 9999
Address	100 Main st New York, NY 10001
Employee Count	2
Balance	N/A

> Run a Report

> Manage Users

> Review Application

> View All Client Documents

> **Navigate to Group**



- **Manage Quotes:** A history of previously submitted quotes will be located within this tab. The name of the quote and when it was saved will be listed. To review additional information about a quote, click on the blue link. Please note you will only have access to quotes assigned to you.

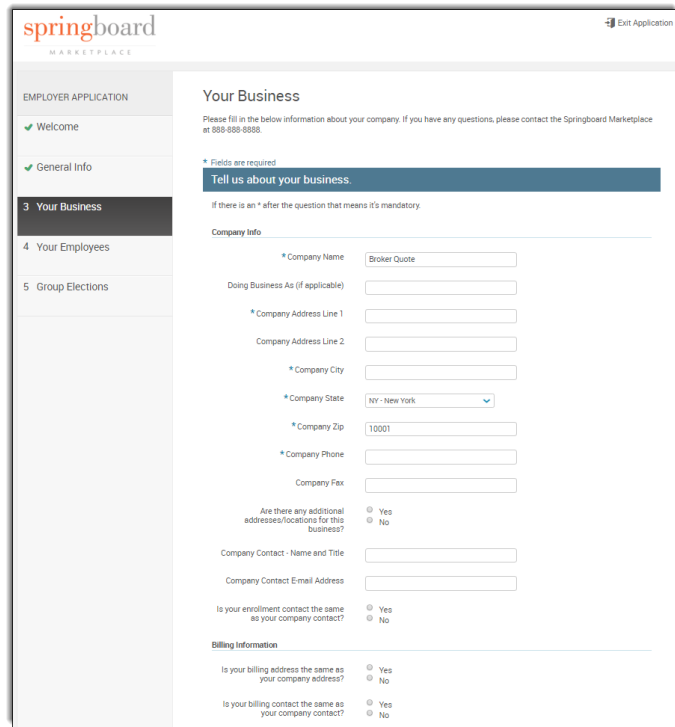
Manage Quotes		
Quote	Quoted On	Remove
<a href="#">Andrew NY Test 80</a>	4/25/2016	✕
<a href="#">NC_16_Med&amp;Dent_No Prior_Vol</a>	4/25/2016	✕
<a href="#">NY_06 Med&amp;Dent_Prior Majors 042516</a>	4/25/2016	✕
<a href="#">CO Dental tiers test</a>	4/25/2016	✕
<a href="#">Test_NC_Composite</a>	4/25/2016	✕
<a href="#">NY Test</a>	4/23/2016	✕

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

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

- **Broker Tools:** Go to this section to generate a quote for a group as well as Start a New Application.

Broker Tools	
 <a href="#">Quote Group</a>	
 <a href="#">Start a New Application</a>	



**springboard**  
MARKETPLACE

Exit Application

EMPLOYER APPLICATION

- Welcome
- General Info
- 3 Your Business**
- 4 Your Employees
- 5 Group Elections

### Your Business

Please fill in the below information about your company. If you have any questions, please contact the Springboard Marketplace at 888-888-8888.

\* Fields are required

**Tell us about your business.**

If there is an \* after the question that means it's mandatory.

**Company Info**

\* Company Name

Doing Business As (if applicable)

\* Company Address Line 1

Company Address Line 2

\* Company City

\* Company State

\* Company Zip

\* Company Phone

Company Fax

Are there any additional addresses/locations for this business? ☐ Yes ☒ No

Company Contact - Name and Title

Company Contact E-mail Address

Is your enrollment contact the same as your company contact? ☐ Yes ☒ No

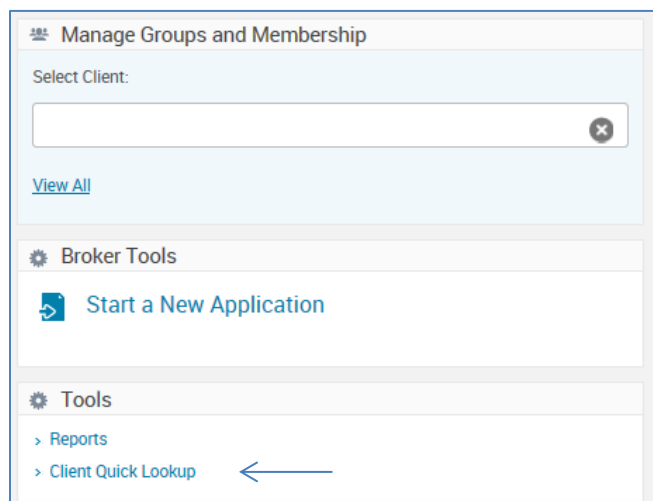
**Billing Information**

Is your billing address the same as your company address? ☐ Yes ☒ No

Is your billing contact the same as your company contact? ☐ Yes ☒ No

## Reporting

You can access reports via the Client Quick Look up on the Admin Home Page. Once you click on 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.



**Manage Groups and Membership**

Select Client:

[View All](#)

**Broker Tools**

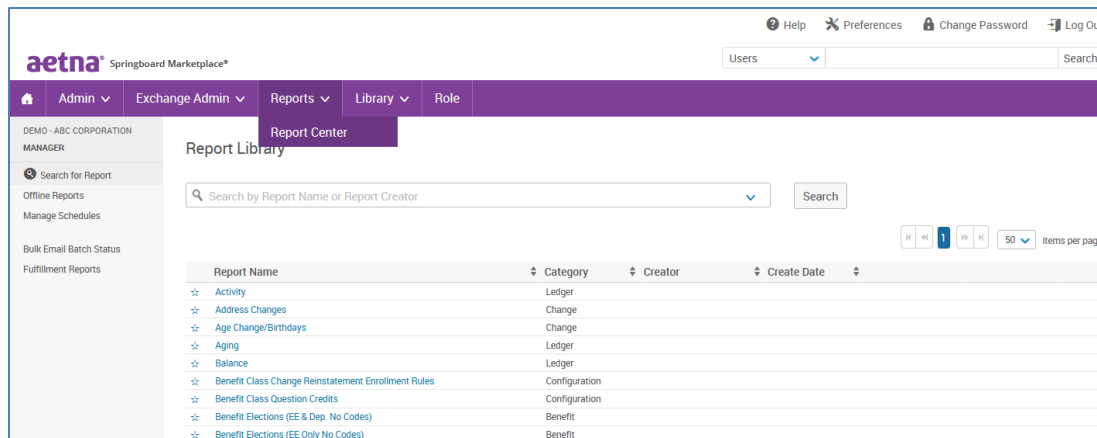
[Start a New Application](#)

**Tools**

- > Reports
- > Client Quick Lookup ←

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

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, and further custom filters can be added after the web report has been generated.
- **Excel:** If this option is selected, the report can be opened and saved as an Excel (.xls) file.
- **CSV:** If this option is selected, the report can be opened and saved 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; whether the report is limited to particular clients, benefit plan types, vendors, benefit classes, etc.; the types of users included; the report's run date; and the report's effective and end dates.

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

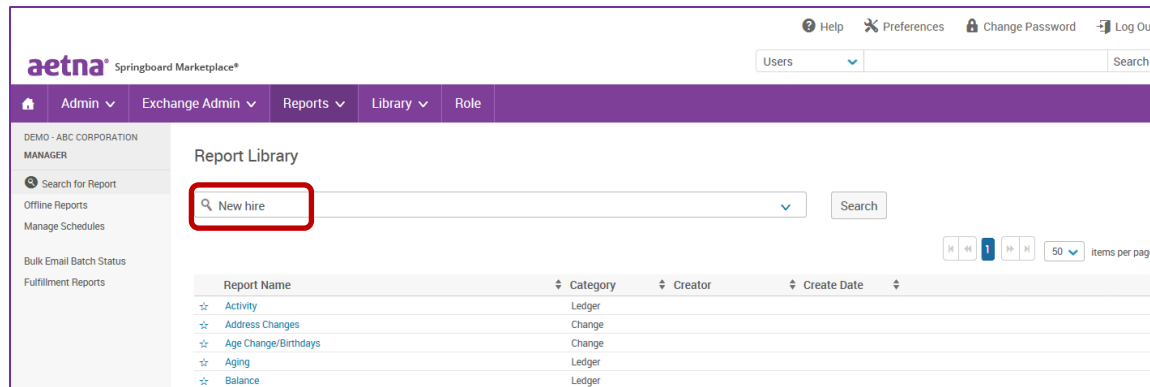
As noted above, you can save reports, making it easier to run customized reports on a recurring basis. You can schedule reports on a daily, weekly, monthly, or quarterly basis.

The recommended output format is Excel, but any of the options noted will provide output. Further, 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 are 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 that are 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.



### Naming tip

if you save a report, the presumption is that it is to be used in the future on one or more occasions. If you save a report that you need only temporarily, it is a good idea to include an additional note. This will help if you wish to clean up unused reports in the future. For example: “Joe’s Birth Date Census – Delete after 30 days” or “XYZ Division Benefit Report – Delete after 1/1/2017.”

## Types of reports

- **Activity reports:** Activity reports provide information about logins that may aid you in contacting employees during an enrollment period. You can use these reports during enrollment periods, along with enrollment reports, to monitor employees' enrollment progress.
- **Admin reports:** Administrative reports are designed to 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 provide information about 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 are responsible for making their own elections. These reports can be used to identify and contact employees who have not completed their enrollment before the enrollment window closes, or to view information about completed enrollments.



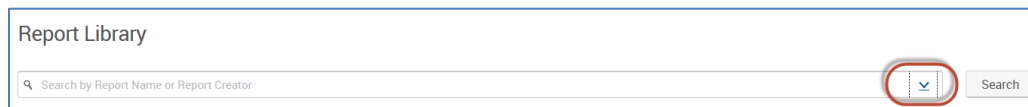
- **Pending reports:** Under certain scenarios, such as plans that need evidence of insurability (EOI), enrollments can be pending for HR Admin approval before being officially posted on an employee's record. Pending reports can be used when HR Admins want to approve changes employees make to their personal information (e.g., last name, address, or banking information). Pending reports exist to help HR Admins monitor, approve, and reject pended information. When pending reports are used in Web format, the HR Admin has the ability to review all pended changes and mark each change as Approved or Rejected within the Web output, without going into each employee record.

### Tip

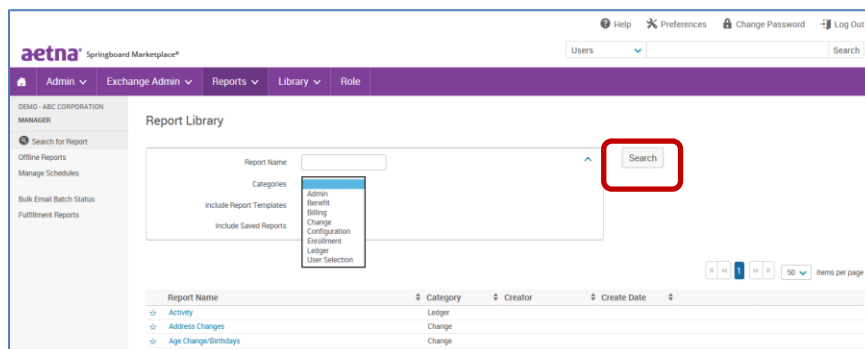
Specific instructions for accessing reports, along with some reports that may be useful, are outlined on the following pages.

## 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.

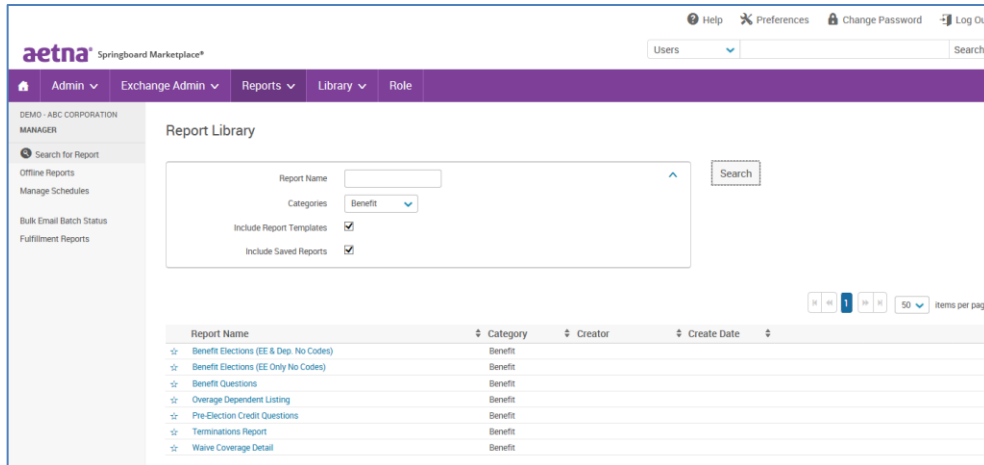


You can select a report category or search on “Report Name”. If you’re searching for a saved report, be sure the “Include Saved Reports” option is checked. Choose “Search”.



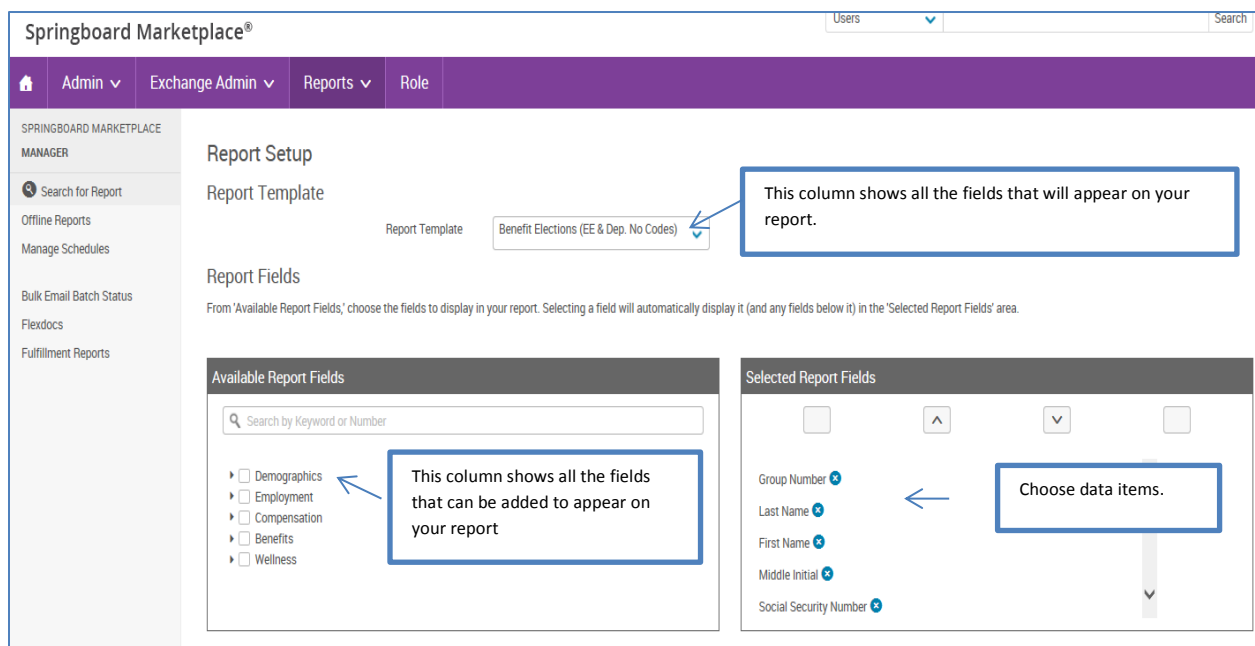
Report Name	Category	Creator	Create Date
Activity	Ledger		
Address Changes	Change		
Age Change/Birthdays	Change		
Annuities	Ledger		

This will display all benefit category reports.



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.



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.

**Business Unit (All Selected)**

**Employment Status**

- ☐ Not Active
- ☒ Active
- ☐ COBRA
- ☐ Retiree

**Relationship Type**

- ☒ Employee
- ☒ Spouse
- ☒ Domestic Partner
- ☒ Child

**User Type**

- ☒ Users

This report defaults to include all relationships, active employees and Users as of today's date.

**Report Dates**

Effective Date: Rolling date | 0 | days | before today

If you want a different effective date, or you want to include population(s) other than active employees, you may change those settings here.

**Report Filters**

Add Condition

Show Header: ☒ Web

Run Offline: ☐ Excel

Show on Admin: ☐ CSV

Bulk Email: ☐

Bulk SMS: ☐

Output Type: Web

Recommended Output: Excel

Run Save As

You can click the "Run" button to run the report. 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.

## Useful reports

1. **Benefit election reports:** Benefit Reports > Benefit Elections (EE & Dependent No Codes) or Benefit Elections (EE Only No Codes)
  - This report will pull 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 will 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.
2. **Census reports:** Admin Reports > Census (EE Only) or Census (EE & Dependent)
  - This report will produce a list of all employees listed under the group, regardless of whether they are enrolled in coverage.
3. **Enrollment changes:** Change Reports > Enrollment Changes (EE Only) or Enrollment Changes (EE and Dep)
  - This report will show enrollment changes that have occurred within a specific time-frame which is defined when the report is run. Changes include but are not limited to new hires, life events, benefit election changes, terminations, COBRA changes, etc.
4. **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 will identify recently terminated employees that may be eligible for COBRA coverage.
- Please 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 will pull 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 any additional information that may be useful.

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 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 that 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 that have been configured to ask questions.	Pull this report to review answers to dental questions during the enrollment. This is only triggered by plans that have been configured to ask questions.

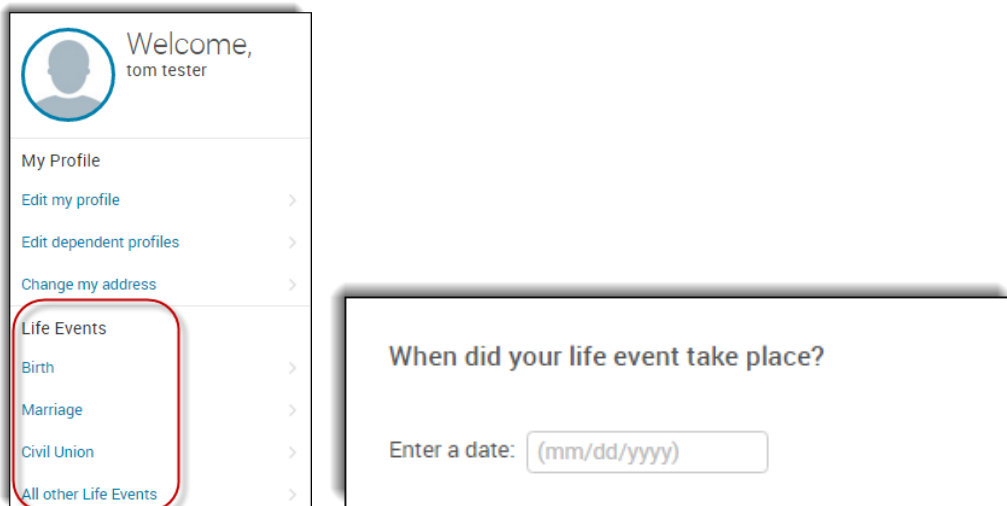
Change	Enrollment Changes (EE Only) & (EE & Dep)	P/C	Identifies and lists all benefit enrollment/coverage changes by employee and dependent. This report can be customized from a selection of fields.	Use this report when you need to see changes in enrollment. You can run the report on individuals with 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 rates for age-banded rates.	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 rate 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 rates loaded for tier based benefit plan types such as medical, dental, and vision plans by employer sponsor site.	This report pulls rates for TIERED plans, by plan and tier. For example, for each medical plan, it will pull rates by Benefit Class, plan, and tier. It will not include volume based rates.
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 that have a new hire enrollment window open and have not yet completed his/her enrollment.	Accounts for employees that have a new hire enrollment window open and have not yet completed his/her enrollment.
Enrollment	Employees in Open Enrollment - Enrollment Complete	P/C	Accounts for employees that have an open enrollment window open and have completed his/her enrollment.	Accounts for employees that have an open enrollment window open and have completed his/her enrollment.
Enrollment	Employees in Open Enrollment - Not Yet Complete	P/C	Accounts for employees that have an open enrollment window open and have not yet completed his/her enrollment.	Accounts for employees that have an open enrollment window open and have not yet completed his/her enrollment.
Pending	Pending Enrollments Awaiting Approval	P/C	Lists all employee enrollments that are currently pending. The pend is triggered by enrollment rules as well as EOI rules when applicable.	Use this report to review any pending enrollments that are 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 will display 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 it was rejected by, and date of rejection.	Use this report to review all pending enrollments that have been rejected. This report will display the reject reason, who it was rejected by and the date of the rejection.

## Life events

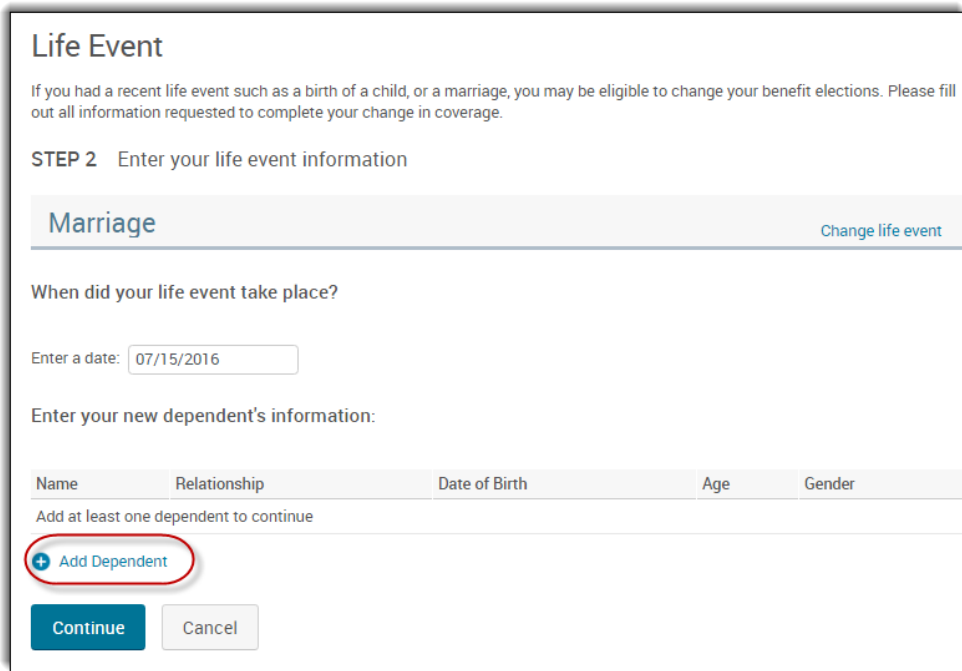
Employees can log on using their username and password to process a life event. If you or an HR Admin will be adding and processing the life event, please refer to the Impersonating a User section then proceed with the steps listed below:

1. From the **employee homepage**, 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, click on the 'All Other Life Events'.



The screenshot shows the employee homepage. On the left sidebar, the 'Life Events' section is highlighted with a red box, containing options: Birth, Marriage, Civil Union, and All other Life Events. The main content area displays a form titled 'When did your life event take place?' with a date input field labeled 'Enter a date: (mm/dd/yyyy)'.

2. Enter the date of when the life event took place.
3. Enter the new dependent information (if applicable for the life event selected) by clicking on the 'Add Dependent' link. Click Save when all information has been entered.



The screenshot shows the 'Life Event' form. The 'Marriage' section is selected, and the 'Add Dependent' link is highlighted with a red box. The form includes a date input field for 'When did your life event take place?' with the value '07/15/2016'. Below this is a table for 'Enter your new dependent's information:' with columns: Name, Relationship, Date of Birth, Age, and Gender. The table is currently empty. At the bottom, there is a 'Continue' button and a 'Cancel' button.

Name	Relationship	Date of Birth	Age	Gender
Add at least one dependent to continue				



4. Click 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
<input checked="" type="checkbox"/> 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

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

**Medical**  
✓ COMPLETED NY Bronze OAEPO 3500 50% | Employee + Spouse

Select who to cover with this plan

<input checked="" type="checkbox"/> tom tester Employee	<input checked="" type="checkbox"/> Spouse Test Spouse
--	---

## COBRA/State Continuation

Groups that are flagged as Home Billed will have a COBRA benefit class available for quoting, but will be ineligible to enroll for benefits. There are thirteen states total, eight of which are on our launch schedule that will not be able to proceed through the enrollment. Groups that are Group Billed/State Continuation, however, 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. Their enrollment rules are set up with the site configuration and the COBRA benefit class will be flagged as benefits eligible.

## Activate COBRA on existing group (Group Billed/State Continuation)

For members employed with Group Billed/State Continuation 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, click the 'Activate COBRA' link located within the left-hand navigation tool bar.



**View/Edit**

**COBRA USER** (Hover ID: 24434146)

**Demographic Information**

First Name	COBRA
Middle Initial	
Last Name	USER
Social Security Number	786-56-7239
Date of Birth	4/30/1982
Age	34
Gender	Male
Tester User	Yes

**Address Information**

Address 1	100 Main St
Address 2	
City	New York
State	NY

Life Events  
Notes  
Employee File  
Personalized Forms  
Family Information  
Assign Roles  
Impersonate User  
Clone User  
Benefit Coverages  
Special Enrollment  
Assign to Client  
Assign to Client/Role/Perms  
**Activate COBRA**  
Re-Hire Employee  
Terminate Employment

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

Benefit Class: COBRA

Benefit Class Effective Date: 07/01/2016

Employment Status: COBRA

Employment Status Effective Date: 07/01/2016

Buttons: Save, Cancel

4. Click 'Save'.
5. After clicking 'Save', a 'Click here to set up COBRA benefits enrollment' link will appear. Clicking on this link will open a Special Enrollment page where you can configure the employee's COBRA benefit enrollment.

### Activate COBRA

✓ Enrollment information was saved successfully.

[Click here to setup COBRA benefits enrollment.](#)

**COBRA USER** (Hover ID: 24434146)

Benefit Class: Employee

Benefit Class Effective Date: (mm/dd/yyyy)

Employment Status: COBRA


Employment Status Effective Date: (mm/dd/yyyy)


Buttons: Save, Cancel

6. On the Special Enrollment page, enter the following information:
  - a. Change Reason: COBRA Activation
  - b. Enrollment Start Date: enter the start date of the enrollment window
  - c. Enrollment End Date: enter the end date of the enrollment window
  - d. Effective Date: enter the effective date of the COBRA benefits
  - e. Benefit Plan Type(s)
7. Click 'Save'.

8. Once updated, click on the 'Go to Enrollment' button and step through the COBRA enrollment.

### Special Enrollment

 Special Enrollment information was saved successfully.

 **COBRA USER** (Hover ID: 24434146)

Go to Enrollment

\* Change Reason

\* Enrollment Start Date

5/17/2016

\* Enrollment End Date

6/17/2016

\* Effective Date

(mm/dd/yyyy)

#### Important Note

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

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