



Company/Group Name _____

General Letter of Understanding for providing Employee Navigator as an HR and Benefits Enrollment Platform

To Whom it May Concern,

At the Blue Orange Solutions, it is our pleasure to build the Employee Navigator solution for your company.

This is a Letter of Understanding ("the Letter") issued by The Blue Orange Solutions, LLC ("TBOS") to _____. The intent of this letter is to set forth the expectations of the relationship between the parties.

This letter contains the conditions and obligations between the parties necessary to provide good and acceptable service in regard to Human Resources Information Solutions ("HRIS"), Enrollment Solutions, Carrier Feeds ("Feeds") for _____.

- TBOS agrees to setup and maintain the Employee Navigator solution for your company at no cost to you. (Not including costs for Electronic Data Interchange "EDI" feeds, Payroll Integration or ACA Reporting).
 - Our compensation will be provided by one of the current carriers.
- _____ agrees to provide all necessary documentation to complete Case Build in a timely manner:
 - **Basic Business Information:** name, address, email, phone, Tax ID, payroll company, HR contacts.
 - **Classes:** full time/part time/seasonal/etc. However your company classifies its employees.
 - **Divisions:** if any--this would be something like locations, departments, etc. (only if needed for tracking purposes).
 - **Eligibility Rules:** this is how the system will determine who receives what benefits (most of the time it is by class) and when the benefits start. (e.g., full-time, 1st of the month after hire date).
 - **Payroll Frequency:** Monthly, Semi Monthly etc. and if there is an adjusted number of deductions; example Bi-Weekly but they only deduct 24 times. We will also need the first pay day for the plan year to set the calendar correctly.
 - **Census:** see attached [SIMPLE CENSUS](#). This is our most basic census that we can load in ENAV. Additional information such as address, email etc., can be included, however we MUST have this minimum.
 - **Benefits:** see attached [CORE RATES Excel Workbook](#). This is a simple format to highlight what benefits are being offered, the monthly rates, and any employer contributions. We also request a copy of your summary of benefits & policy documents to verify benefit offerings on life & disability plans. We can include SBCs, Benefit Booklet, Fliers, Legal Notices, EOI's for employees to view during the enrollment process.
 - **Plan Year:** when does open enrollment start? when are the coverage effective dates?
 - **Carrier Reporting:** if a carrier requires a specific reporting format at the end of open enrollment (e.g., Excel workbook) please provide TBOS with this structure during the initial building phase.
- This service does NOT include:
 - **HR Reporting:** TBOS does not assist in importing or exporting HR reports nor does TBOS support the ongoing creation of HR reports. We will offer a general training on these functions and help guides can be found on the [Zendesk](#).
 - **Maintaining Employee Records:** including, but not limited to entering new hires, terminations, life events and enrollment changes.
 - **834 EDI Feeds:** These are standardized feeds for medical, dental, and vision carriers. TBOS charges a \$500.00 per carrier to setup these feeds. Please note the Employee Navigator has elevated carrier relationships ("Data Exchange"). Data exchange connections are offered at no-cost.



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- **ACA E-filing:** while TBOS does not provide tax consultation or advice for this function, the function is available for HR Users and Brokers under the ACA TAB. The cost to use this function via NELCO (TBOS will link to this site). The current fee schedule is published on the [Zendesk](#). This fee is subject to change, please confirm with NELCO prior to submitting.
- **Payroll Integration:** Employee Navigator can communicate with certain payroll companies. TBOS will assist in the initial set up at no cost, however costs can be incurred depending on your payroll company. Please discuss this cost with your payroll company contact. Please consult the [Zendesk](#) for current connections and fee schedule.
- Things to consider:
 - If you are requesting current benefits & elections loaded, we can provide this service. However, this is a complex process and will extend the build time. This service is discussed on a case-by-case basis and will require additional reports.
- Timeline:
 - **New Builds:** a typical build usually takes a minimum of 10 business days, once all information is received - this is without loading current elections. If current elections are to be included in the initial build this will add an additional 5 to 10 business days to the build. A walk through will be scheduled with Broker, Agent, HR etc., once your portal is ready. We do this to ensure rates, benefits, guides etc. are built correctly and the client is satisfied.
 - **Renewal Builds:**
 - Benefit updates including renewal rates, new SBCs etc. Please use the [CORE RATES WORKBOOK](#) to communicate these changes.
 - Any changes to business structure e.g., payroll cycle, classes, divisions.
 - **Timeline for Renewals:** Minimum of 5 business days from date of receiving all documents.
- Additional Notes:
 - The Blue Orange Team is here to support you through all the steps in setting up your Employee Navigator platform: the build, employee information imports, reporting at the end of your open enrollment and help with any inconveniences along the way.
 - Many of the functions of Employee Navigator can be found on the [Zendesk](#), or during one of our HR training sessions, which can be scheduled using our [bookings](#) site.
 - Training sessions include:
 - How to input a new hire
 - Terminations
 - Running deduction reports etc.

Group Signer's Name: _____

Group Signer's Title: _____

Email: _____

Signature: _____

Broker (If Applicable): _____

Email: _____

Signature: _____

Date: _____

The Blue Orange Solutions, LLC
2435 N Central Expy Suite 1200
Richardson, TX 75080
888 481-3336

Signature: _____

Justin Goss | Chief Operating Officer

Date: _____