

How to Make the Most of Your Benefits Administration Platform

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When onboarding new clients, they often tell us they're ready to abandon their old benefits administration platform and jump to a new one. But as they list the woes and shortcomings of their current system, we can usually tell them that the platform itself may not be the problem. A faulty implementation may be introducing errors or disabling features, making it seem limited and leading to frustration. Whether you're struggling with your current processes or just eager to see what else it can do, here's how to get the most out of your benefits administration platform..

Lurking Liabilities

A benefits administration platform is a big investment and an even bigger asset for HR teams that may be struggling with staff shortages. The system takes care of the ongoing work behind employee benefits, automating important benefits selection, enrollment and management processes and saving HR teams time and energy. However, even the best benefits administration platform is only as good as its implementation.

The timesaving and usability benefits for both HR and employees are significant, but if there are implementation issues, your organization may face liabilities. A tremendous amount of data needs to be coordinated between HRIS, carrier, vendor and payroll teams and platforms. If these databases aren't correctly communicating or communicating incorrect data, your employees and their dependents may lose or receive the wrong coverage. If this leads to interrupted coverage, that could mean fines and fees.

Consider Your Pain Points

Whether you are looking to get more out of your current platform or are in the market for a new one, identifying your pain points is the first step to making sure your organization's needs will be met by this software.

Eligibility errors introduced during implementation can result in employees not getting the right benefits at the right time. Consider these questions and be sure to define or redefine these requirements.

- When do an employee's benefits start? After they leave the organization, when do they end?
- Who is eligible for which benefits? Are there differences between different departments? Parttime employees versus full-time employees?
- Which employees pay which costs?

"What if" scenarios challenge the standard operation of your platform by introducing rare, specific or nuanced situations like:

- What if an employee goes from part time to full time—what happens to their benefits?
- What if an employee changes departments or gets rehired—when would their benefits go into effect?

Audit and Test Your Platform

Teams may find that adding new data or employee requirements to the system affects data in other places. If this is happening, go back, make a list of all of your requirements, define them (or redefine them if they're not clear), and make sure all of them are properly reflected in your system.

It's easy for small mistakes to happen, especially when onboarding new employees. Look at the full end-to-end spectrum and test how your requirements interact with each other in your system to avoid a domino effect when making changes to certain benefits. It's important to understand how changes affect other processes, like payroll or billing.

Benefits administration software often comes with its own QA checklist for accurately making changes. Ask to see the software system's test plan and test results to understand the full extent and inner workings of the platform.

Tactical Templates

Develop onboarding templates to help ensure there is no missing information when adding new employees to your system. Consult with your broker to help you not only design and implement templates into your onboarding process, but test and troubleshoot the effectiveness of those templates to create a working, repeatable process.

Get Additional Support and Training

Consult with your broker regularly to make sure you and your team receive regular training and are using your system to the fullest. You can get the most out of your platform by working with a broker or consultant who doesn't just understand the technical side of the platform, but how the platform's programming affects your employees and their benefits.

A consultant who understands the role of human resources and technology will bring a much more holistic approach to your team when it comes to your employees and their benefits.

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