HRA Hub Administrator's Onboarding Guide

Welcome to your new HRA!

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

This guide will be your roadmap, helping you:

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

Helpful Note:

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

Have questions? Connect with the Take Command team. We're happy to help!

Chat With Us
Go to Take Command's website

Call Us
1-855-TCH-HRAS

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

HRA Program Timeline

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

Program Onboarding

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

1. **Educate Employees.** Announce your HRA. We created a sample email to make it easy for you, in addition to information and documents in our Employee Resources Center.

2. **Complete your onboarding checklist.** To complete your checklist, log into your HRA Hub admin portal.

    - **View & acknowledge your HRA documents.** Acknowledge documents provided by Take Command.
    - **Set up your employees.** Upload your employee roster via CSV or add individually.
    - **Set up AutoPay (if applicable).** Apply for your AutoPay account & connect your bank account.
    - **Establish email invitation date.** Set a date for your employees to receive an email invitation to the platform.
    - **Set up subscription billing.** View estimates, manage your payment method and view invoices.

Pro-Tip:

All steps in the onboarding checklist must be completed to be fully onboarded. You can go back and review the checklist at any time to ensure completion.

***For AutoPay Customers:** Your Autopay application & bank account must be connected at least 2 business days prior to employee plan shopping.*

Employee Onboarding- Shopping & Enrollment.

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

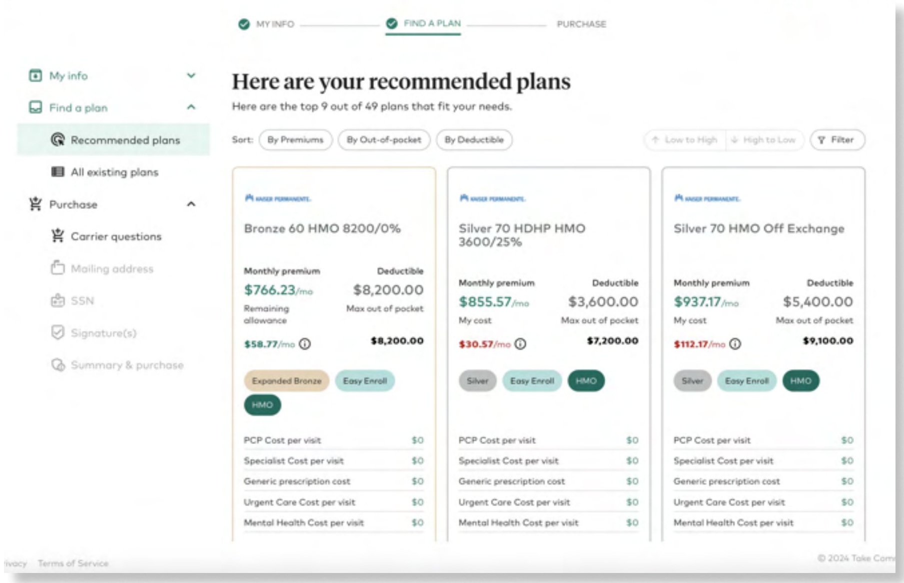
1. **Shop for a plan** on our platform using their monthly allowance. Our Enrollment team can help employees find a good plan if they want help. They can schedule an appointment on our Employee Resources page.

2. **Upload "proof of coverage"** (aka plan documents). Their monthly allowance can be used for an established, qualified plan if they already have one (including Medicare).

3. **Waive the benefit**. For employees who may not need or want to shop for a health plan, they can waive the benefit.

For More Information:

Our Employee Shopping Guide highlights the employee shopping experience on the HRA Hub platform.



Pro-Tip:

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

Easy Enroll

Important Onboarding Information:

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

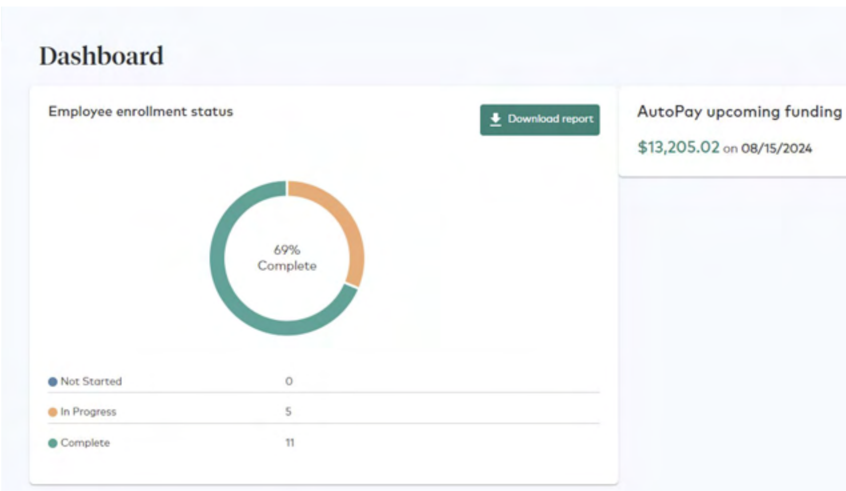
Onboarding timing: The time involved for program set-up and onboarding can range. Employers new to benefits can set up an HRA and onboard in a few days while larger employers and those transitioning from group plans may take a little longer to avoid any gaps in coverage.

Program Administration

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

Employee Roster Management	Employee Insurance Coverage	Reports & Billing	Employee Reimbursement *(if not on AutoPay)*

Your HRA Hub [admin portal]() will be your hub for these activities. Log in and view your employer dashboard.

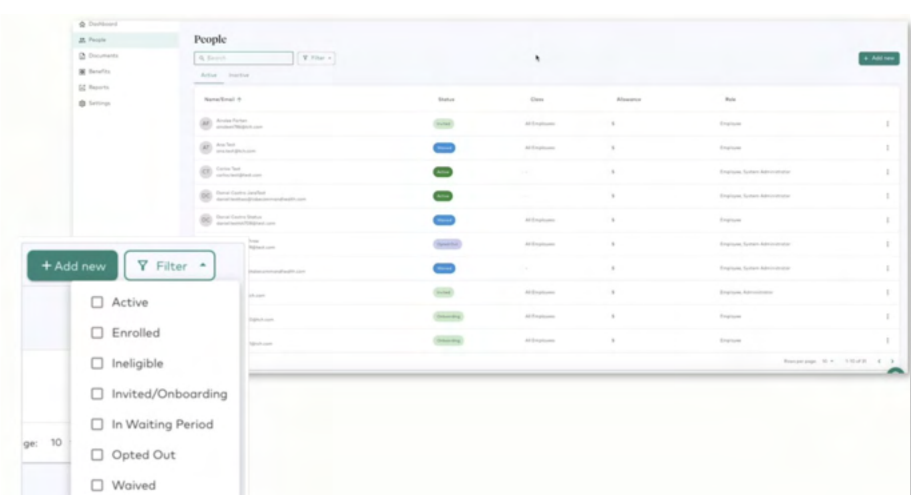


Employee Onboarding Status

In your portal you can view the status of your employees as they go through the onboarding process at a glance or in detail. You'll click "Download Report" to see employee status in greater detail and employee plan details.

Roster Management

Click the "People" tab on the left side of your screen. On this screen you can add new employees, terminate, reinstate, and waive employees. You can also search for employees or filter by their onboarding status.

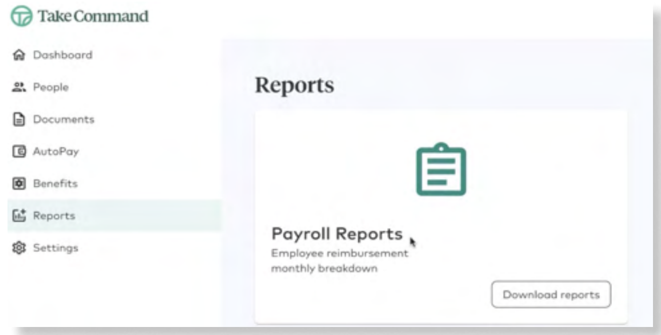


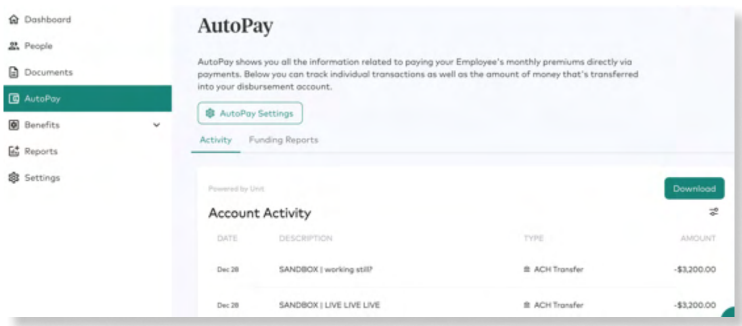
Reporting

Click the “Reports” tab on the left side of your screen. On this screen you can view Payroll reports.

Payroll reports include:

- Employee ID
- Employee Name
- Reimbursement Time Period
- Allowance
- Premium
- Tax Deduction
- Reimbursement





AutoPay Activity *(if applicable)*

Click the “AutoPay” tab on the left side of your screen. On this screen you can view detailed transaction information around your AutoPay Activity & Funding Reports.

For More Information:

Our AutoPay Explainer details how AutoPay works on the HRA Hub platform.

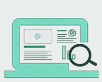
Employee Insurance Coverage

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

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

Billing

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



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