

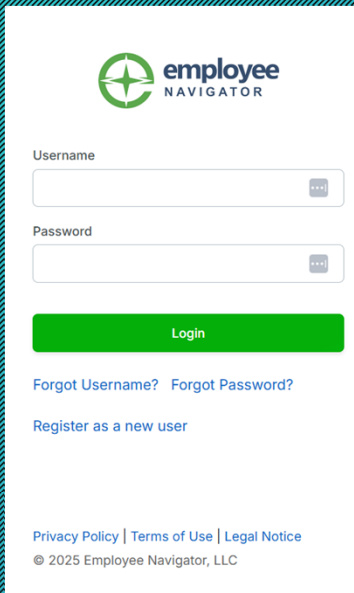


3 Common Tasks in Employee Navigator



Management of ongoing data changes

Logging In

The image shows a login page for Employee Navigator. At the top left is the logo, which consists of a green circle with a white crosshair and the text "employee NAVIGATOR" to its right. Below the logo are two input fields: "Username" and "Password". Each field has a small eye icon on the right side. Below the password field is a green "Login" button. Under the button are two links: "Forgot Username?" and "Forgot Password?". Below these links is a link that says "Register as a new user". At the bottom of the page are three links: "Privacy Policy", "Terms of Use", and "Legal Notice", followed by a copyright notice: "© 2025 Employee Navigator, LLC".

 employee NAVIGATOR

Username

Password

Login

[Forgot Username?](#) [Forgot Password?](#)

[Register as a new user](#)

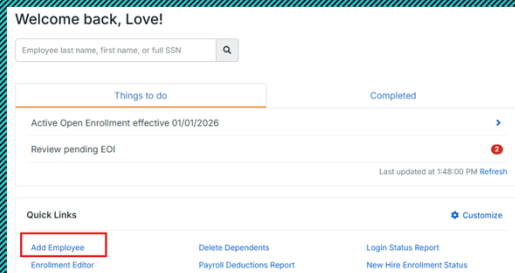
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Go to www.EmployeeNavigator.com and click **Login**

- **Returning Users:** Login with the username and password you selected previously.
- **If you forgot your password,** contact your Inszone Insurance Account Manager to have it reset!

Item 1: Adding an Employee in Employee Navigator



Welcome back, Love!

Employee last name, first name, or full SSN

Things to do Completed

Active Open Enrollment effective 01/01/2026

Review pending EOI

Last updated at 7:48:00 PM Refresh

Quick Links Customize

Add Employee

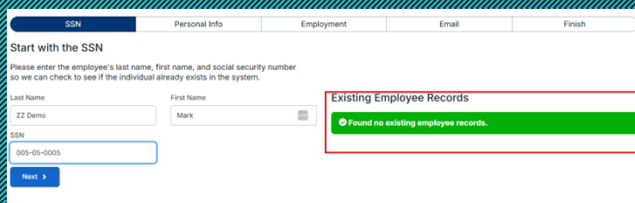
Delete Dependents

Login Status Report

Enrollment Editor

Payroll Deductions Report

New Hire Enrollment Status



SSN Personal Info Employment Email Finish

Start with the SSN

Please enter the employee's last name, first name, and social security number so we can check to see if the individual already exists in the system.

Last Name First Name

ZZ Demo Mark

SSN

005-05-0005

Next

Existing Employee Records

Found no existing employee records.

Click on Add Employee from your Home page. This takes you through a guided experience adding employee's complete with a progress bar so that you know where you are in the process!

Any required fields not completed during the Add Employee process will prevent you from moving forward.

Employee Navigator automatically prevents the addition of duplicate records!

Item 1: Adding an Employee in Employee Navigator

Add an Employee

SSN Personal Info Employment Email

Then add the employee information

The following data is required to establish a new employee record

SSN 005-05-0005

Last Name ZZ Demo

Middle Name

First Name Mark

Suffix --Select--

Sex ☐ Male ☐ Female
Sex is required

Gender Identity --Select--

Date of Birth
Date of Birth is required

State of Residence --Select--
State of Residence is required

Payroll Work State --Select--

Work Email

Personal Email

Primary Email Type --Select--

Next >

Personal information includes the demographic data needed to establish a record in Employee Navigator for the employee.

Note: Users are prevented from moving forward until required fields are completed.

Item 1: Adding an Employee in Employee Navigator

Add an Employee

SSN Personal Info **Employment** Email Finish

Then add the employee information
The following data is required to establish a new employee record

SSN: 005-05-0005

Hire Date: 12/15/2025

Job Title: Tester

Class: Full Time Benefit Eligible

Employment Type: Full-Time

Payroll Group: BI-Weekly (26)

Manager: type manager's last name

☐ No manager

Salary fields

Pay Basis: Salary

Hourly Rate: 40.00

Hours Per Week: 40.00

Annual Base Salary: 65000

ACA / Statutory Classifications

ACA Classification: --Select--

Statutory Class: --Select--

Is Seasonal: ☐ Yes ☒ No

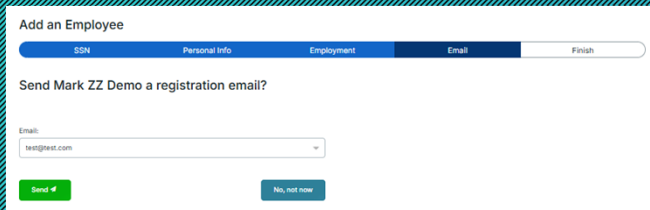
Department: 100 - Department

[< Back](#) [Next >](#)

The Employment page collects employee related data that drives benefit eligibility and pricing.

Note: Field(s) at the bottom of the Employment page are those uniquely required by your company.

Item 1: Adding an Employee in Employee Navigator



Add an Employee

SSN Personal Info Employment **Email** Finish

Send Mark ZZ Demo a registration email?

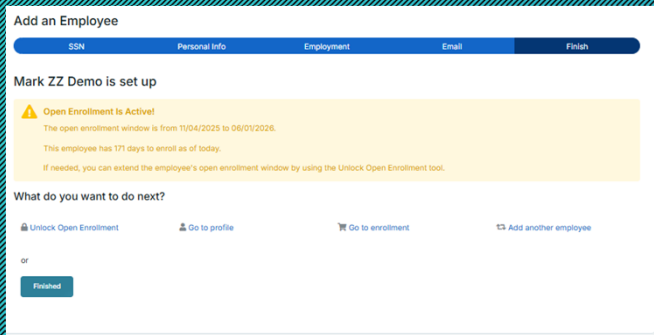
Email:
test@test.com

Send No, not now

In the last step you have an opportunity to invite the employee into Employee Navigator by sending them a **Registration Email** which includes instructions on where to go and how to login.

***NOTE:** This is not your last opportunity to send the employee a Registration Email!*

Item 1: Adding an Employee in Employee Navigator



The screenshot shows the 'Add an Employee' form in Employee Navigator. The form has a progress bar at the top with five steps: SSN, Personal Info, Employment, Email, and Finish. The 'Finish' step is currently selected. Below the progress bar, the text 'Mark ZZ Demo is set up' is displayed. A yellow warning box with a triangle icon contains the text: 'Open Enrollment is Active! The open enrollment window is from 11/04/2025 to 06/01/2026. This employee has 171 days to enroll as of today. If needed, you can extend the employee's open enrollment window by using the Unlock Open Enrollment tool.' Below the warning box, the text 'What do you want to do next?' is displayed. There are four buttons: 'Unlock Open Enrollment', 'Go to profile', 'Go to enrollment', and 'Add another employee'. Below these buttons, the text 'or' is displayed, followed by a 'Finished' button.

As you Finish, you can:

- Unlock Open Enrollment
- Go to Profile
- Go to Enrollment
- Add Another Employee

Item 2: Managing Data in Employee Navigator

Welcome back, Love!

Employee last name, first name, or full SSN

Things to do **Completed**

No partner discrepancies	✓
No pending benefit enrollments	✓
No pending profile changes	✓
No employees missing HR required fields	✓
No invalid addresses	✓
Integration actions completed	✓
No Carrier Enrollment Forms to download	✓

Last updated at 1:48:00 PM [Refresh](#)

Things to do **Completed**

Active Open Enrollment effective 01/01/2026	>
Review pending EOI	2

Last updated at 1:48:00 PM [Refresh](#)

Your **Home** page provides direct access to a variety of workflow tools to manage data accuracy. Any items in the Things to Do will have a number in RED identifying how many employees have inaccurate data which require follow-up.

Each item has its own workflow for correcting inaccurate data.

- The **COMPLETED** folder has the full list of potential data problems, if Completed with a Green Check, no action is needed.
- The **THINGS TO DO** folder has the listing of true data issues requiring follow-up with the number of impacted records appearing in RED on the appropriate line item.

Item 2: Managing Data in Employee Navigator

Welcome back, Love!



Things to do

Completed

Active Open Enrollment effective 01/01/2026 >

Review pending EOI 

Last updated at 1:48:00 PM [Refresh](#)

zz Demo, Love

ZZ Demo, Erica

ZZ Demo, Kari

ZZ Demo, Lisa

ZZ Demo, Love

ZZ Demo, Mark

ZZ Demo, Susan

The **Home Page** is the location of the Employee Search Bar allowing you to view and/or update an individual employee record.

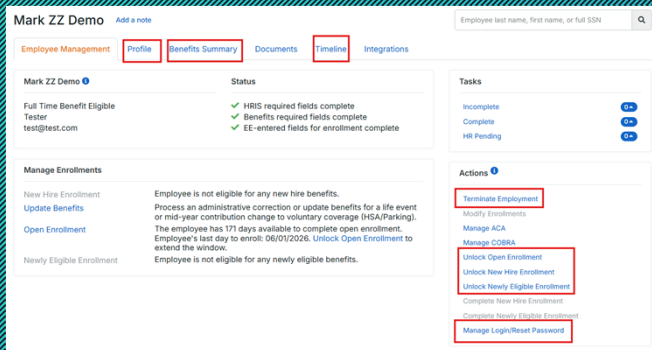
You can search by Last Name, First Name or Full SSN (with or without the dashes).

***Note:** If you have more than one employee with the exact name, you will also see the last 4 digits of the employee SSN allowing you to locate the correct record.*

Tip:

- Entering ZZ in the Search Bar brings up everyone that has that string of characters in their first or last name!

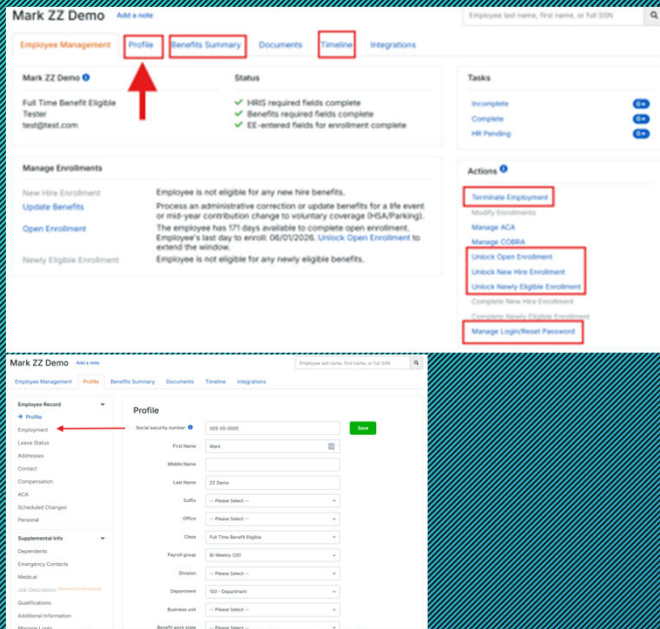
Item 2: Managing Data in Employee Navigator



Clicking on the name of the individual employee you are searching for will take you to the **Employee Management** screen/dashboard.

Access to Employee Navigator features along the data in Employee Navigator that you can change starts on this page.

Item 2: Managing Data in Employee Navigator



PROFILE

The Profile folder allows you to access the separate areas that store your employee's data.

Fields that are open to you can be updated. If updated they are tracked by who made the change, and what day they were changed.

Item 2: Managing Data in Employee Navigator

Mark ZZ Demo Add a new

Employee last name, first name, or full SSN

Employee Management Profile **Benefits Summary** Documents Timeline Integrations

Mark ZZ Demo

Full Time Benefit Eligible
Tanner
test@nest.com

Status

- ✓ HRS required fields complete
- ✓ Benefits required fields complete
- ✓ EE-entered fields for enrollment complete

Manage Enrollments

New Hire Enrollment
Update Benefits
Open Enrollment
Newly Eligible Enrollment

Employee is not eligible for any new hire benefits.
Process an administrative correction or update benefits for a life event or mid-year contribution change to voluntary coverage (HSA/Parking). The employee has 171 days available to complete open enrollment. Employee's last day to enroll: 06/01/2026. [Unlock Open Enrollment](#) to extend the window.
Employee is not eligible for any newly eligible benefits.

Tasks

- Incomplete
- Complete
- HRS Pending

Actions

- [Terminate Employee](#)
- [Modify Enrollment](#)
- [Manage ACA](#)
- [Manage COBRA](#)
- [Unlock Open Enrollment](#)
- [Unlock New Hire Enrollment](#)
- [Unlock Newly Eligible Enrollment](#)
- [Complete New Hire Enrollment](#)
- [Employee Needs Startup Process](#)
- [Manage Login/Reset Password](#)

Mark ZZ Demo Add a new

Employee last name, first name, or full SSN

Employee Management Profile **Benefits Summary** Documents Timeline Integrations

Benefits Summary Benefits Eligibility

View Details print

Enrolled Plans

Plan Type	Carrier	Plan Name	Coverage	Effective	Cost
Medical	Aetna Blue Cross Blue Cross of CA	2026 Aetna Platinum PPO 90/250/50%	Employee	01/01/2026	\$198.15
Accident	Principal Financial Group	2026 Principal Life Accident Coverage	Employee	01/01/2026	\$4
Dental	Principal Financial Group	2026 Principal Life Dental Low Plan	Employee	01/01/2026	\$13
Vision	Principal Financial Group	2026 Principal Life Vision Plan (VSP)	Employee	01/01/2026	\$0.75
Group Life	Principal Financial Group	2026 Group Life Insurance	Employee	01/01/2026	\$0
Voluntary Life	Principal Financial Group	2026 Principal Life Voluntary Term Life Insurance	Employee	01/01/2026	\$52.86

Total Cost Per Pay Period
\$198.15

Open Enrollment -
Current Period
Open Enrollment
Pending Period
History

BENEFIT SUMMARY

The **Benefit Summary** delivers all the Current, Open Enrollment or Historical coverage(s) for an employee, depending on which item you select in the drop-down on the upper right side of the screen.

Visible items are the employee election, coverage level, employee per pay cost and benefit amount (if appropriate for the plan).

What Else Can I See?

- Covered Dependent(s)
- Spending Account or HSA elections
- Declined Benefits

Item 2: Managing Data in Employee Navigator

The screenshot displays the 'Employee Navigator' interface for 'Mark ZZ Demo'. The 'Timeline' tab is selected, showing a list of events. A red arrow points to the 'Timeline' tab in the top navigation bar. The 'Actions' panel on the right lists several actions, with 'Terminate Employment', 'Unlock Open Enrollment', 'Unlock New Hire Enrollment', 'Unlock Newly Eligible Enrollment', and 'Manage Login/Reset Password' highlighted with red boxes. The 'Event' table below shows a list of events with columns for 'Event', 'On', 'Event Date', 'Description', 'Dependent', 'By', and 'Actions'.

Event	On	Event Date	Description	Dependent	By	Actions
Employee Termination	12/17/2025	3:11:40 PM CST	Termination effective 12/20/2025	Low	Dougherty	
Voluntary Life - 2026 Principal Life Voluntary Term Life Insurance	12/17/2025	2:36:28 PM CST		Low	Dougherty	Details
Group Life - 2026 Group Life Insurance	12/17/2025	2:36:28 PM CST		Low	Dougherty	Details
Dental - 2026 Principal Life Dental Low Plan	12/17/2025	2:36:28 PM CST		Low	Dougherty	Details
Medical - 2026 Anthem Platinum PPO 12/20/2025	12/17/2025	2:36:28 PM CST		Low	Dougherty	Details
Vision - 2026 Principal Life Vision Plan (VSP)	12/17/2025	2:36:28 PM CST		Low	Dougherty	Details
Accident - 2026 Principal Life Accident Coverage	12/17/2025	2:36:28 PM CST		Low	Dougherty	Details

TIMELINE

The Timeline shows you:

- All event changes made for an employee
- Who made the change
- What date the change was made

The order on the page is most recent at the top and the earliest at the bottom (when the record was created).

This is an excellent tool for HR to track changes made and provides the 'proof' needed to the employee regarding each change made.

Item 2: Managing Data in Employee Navigator

The screenshot displays the 'Employee Navigator' interface for 'Mark ZZ Demo'. The top navigation bar includes 'Employee Management', 'Profile', 'Benefits Summary', 'Documents', 'Timeline', and 'Integrations'. The 'Benefits Summary' tab is active, showing a 'Status' section with three green checkmarks indicating that HRS, required fields, and EE-entered fields for enrollment are complete. Below this, the 'Manage Enrollments' section lists 'New Hire Enrollment', 'Update Benefits', 'Open Enrollment', and 'Newly Eligible Enrollment'. A red arrow points from the 'Open Enrollment' link to the 'Terminate Employment' link in the 'Actions' column. The 'Terminate Employment' link is highlighted with a red box. Below the main interface, a 'Termination Date' form is shown, featuring a date picker and a dropdown menu for 'What is the Reason for Termination?'. The dropdown options include 'Voluntary Termination', 'Involuntary Termination', 'Reduction in Force', 'Retirement', 'Death of Employee', and 'Gross Misconduct'. A red arrow points from the 'Open Enrollment' link in the main interface to the 'What is the Reason for Termination?' dropdown in the form. The form also includes a 'Save' button and a 'Cancel' button.

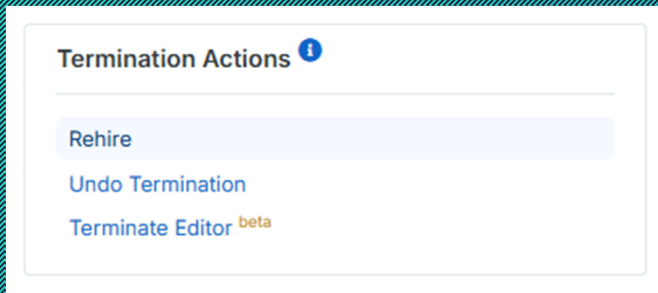
TERMINATE EMPLOYMENT

The **Terminate Employment** hyperlink takes you thru the termination workflow.

Users must:

- Confirm the mailing address for the employee
- Enter the exact termination date (Employee Navigator calculates the benefit end date based on each plan's defined rules)
- Click on the Termination Reason

Item 2: Managing Data in Employee Navigator



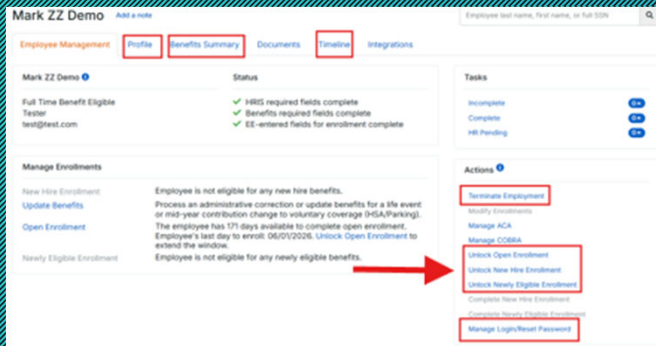
TERMINATE EMPLOYMENT (cont'd)

Once a termination has been processed, a Termination Actions box appears on the Manage Employee page.

These choices include:

- Rehire the employee (rehiring the employee with a break in service)
- Undo the Termination (as if it never happened)
- Terminate Editor (changing the termination date if it was entered incorrectly)

Item 2: Managing Data in Employee Navigator

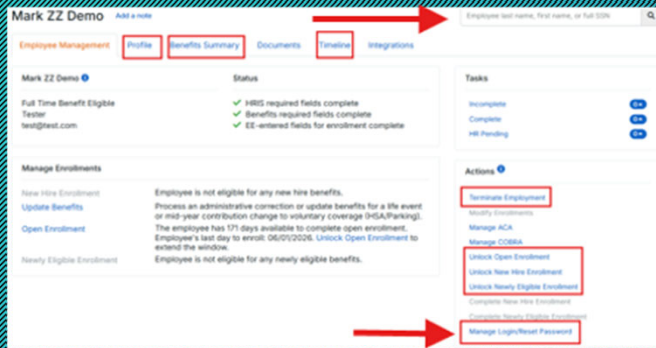


UNLOCK ENROLLMENTS

These hyperlinks give you the ability to unlock the type of enrollment needed. This is so HR can approve an enrollment extension for the employee:

- Unlock Open Enrollment (only available prior to the OE Admin End Date)
- Unlock New Hire Enrollment
- Unlock Newly Eligible Enrollment

Item 2: Managing Data in Employee Navigator



MANAGE LOGIN/RESET PASSWORD

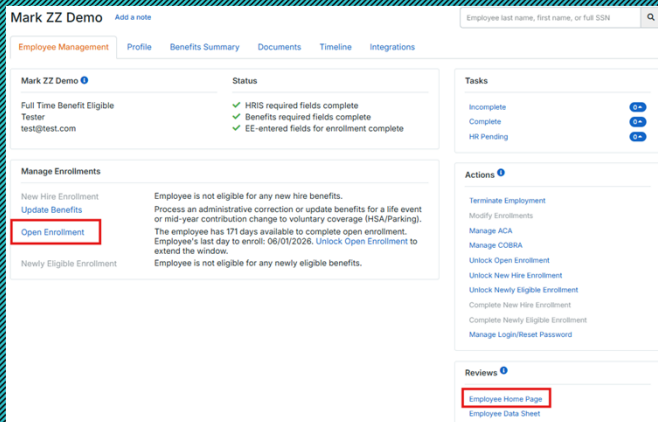
If an employee is having difficulty logging in or has not yet registered, you can manage their login capability by

- Sending them a new Registration Email, or
- Resetting their password

Tip:

- Once you are completed reviewing or updating information for the employee you can immediately search for another employee by using the Employee Search bar located at the top right of the page without going back to the Home Page.

Item 3: Impersonating an Employee

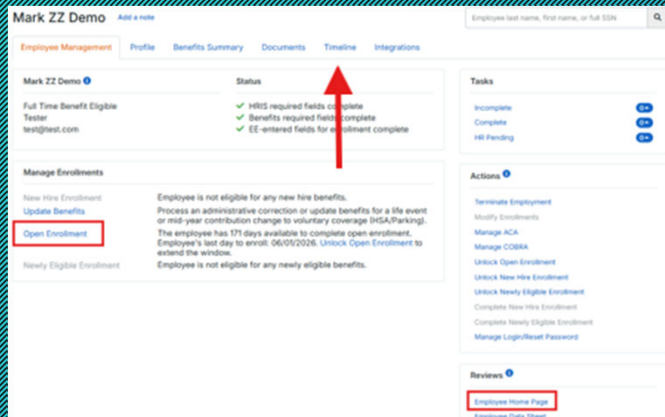


There are 2 ways you can impersonate an employee:

- Using an available hyperlink in the Manage Enrollments box
- Clicking Home Page allows you to experience the entire site as if you were the employee

NOTE: This page is an example of an employee that is past their New Hire enrollment period and eligible for Open Enrollment. The Open Enrollment hyperlink is only available during your Open Enrollment period. For employees in their New Hire or Newly Eligible enrollment period, those hyperlinks would be active.

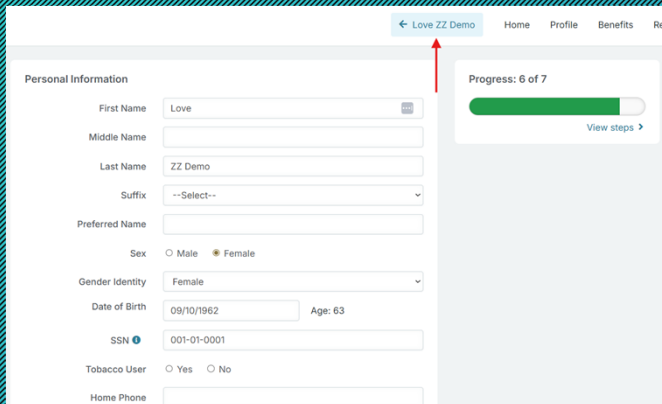
Item 3: Impersonating an Employee



IMPORTANT IMPERSONATING NOTE:
The timeline records every change made while impersonating the employee:

- Who made the change
- When the change was made

Item 3: Impersonating an Employee



The screenshot shows a web application interface for managing employee profiles. At the top, there is a navigation bar with a breadcrumb trail: < Love ZZ Demo > Home Profile Benefits Rec. A red arrow points to the 'Love ZZ Demo' link in this trail. Below the navigation bar, the main content area is divided into two sections. On the left, under the heading 'Personal Information', there is a form with the following fields: First Name (Love), Middle Name (empty), Last Name (ZZ Demo), Suffix (dropdown menu showing '--Select--'), Preferred Name (empty), Sex (radio buttons for Male and Female, with Female selected), Gender Identity (dropdown menu showing 'Female'), Date of Birth (09/10/1962) with Age: 63, SSN (001-01-0001), Tobacco User (radio buttons for Yes and No, with No selected), and Home Phone (empty). On the right, there is a progress indicator showing 'Progress: 6 of 7' with a green progress bar and a 'View steps >' link.

When you have completed impersonating your employee, click on their name (top center of screen) and you will be back in your view and authority level within Employee Navigator.