



ALDRICH BENEFITS ADMINISTRATION SERVICES

Aldrich Benefits works together with HR to manage the Employee Navigator site. The administration services our HR Technology Team provides are listed but not limited to the below.

HR TECHNOLOGY + CONSULTING SERVICES	COST
Implementation Services	
Kick-off Implementation Call	Included
Structure Assessment	
Determine Implementation Timeline + Provide HR Checklist	
Create + Customize New Group Employee Navigator Portal	
Build Group Benefits/Plan Offerings	
Configure Employee Onboarding Tasks	
Upload Initial Employee Census + Current Enrollment Data	
Upload Company Documents + Notices	
Customize Employee Homepage, Onboarding + Enrollment Experience	
Regular Implementation Check-ins	
Hands-on Employee Navigator Training Sessions for HR Users	
Coordinate Eligibility Processing Plan	
Open Enrollment Services	
Build and/or Update Group Benefits/Plan Offerings	Included
Update Onboarding Tasks	
Upload Updated Company Documents + Notices	
Update Employee Homepage, Onboarding + Enrollment Experience	
Build + Customize Employee-Facing Open Enrollment Module	
Draft + Send Employee Open Enrollment Communication	
Process Employee Open Enrollment + Demographic Changes with Carriers	
Post-Renewal Audit of Carrier Enrollment Records for Accuracy	



HR TECHNOLOGY + CONSULTING SERVICES		COST
Ongoing Services		
Assistance + Training for HR Users	Included	
Site Maintenance + Customization		
Automated Eligibility File Feed Set-up + Maintenance <i>where applicable</i>		
Manual Eligibility Processing via carrier portals, email, etc. <i>where applicable</i>		
Periodic Audits of Carrier Enrollment Records for Accuracy		
Optional Services		
ACA Tracking + Reporting Tool	Varies	
PTO Tracking Module		
Payroll Vendor Integration		
COBRA Administrator Integration		



EMPLOYEE BENEFITS CONSULTANT

Evan Cole

Evan Cole partners with his clients to advise and assist them with their employee benefit plans, specializing in group and association plans. Prior to joining Aldrich, Evan was a top producing employee benefits representative for one of the nation's largest life, disability, and dental carriers. He holds licenses for life and health in the states of Oregon, Washington, and California. Evan is also an active member of the Oregon Association of Health Underwriters and supporter of the ACE Mentor Program of Oregon.

Evan graduated cum laude from Syracuse University with a Bachelor of Science in marketing and entrepreneurship.

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About Aldrich Benefits LP

We assist employers with benefits consulting including strategic planning, medical, dental, ancillary, and voluntary benefits for their employees. Aldrich Benefits LP is part of the Aldrich Group of Companies which includes Aldrich CPAs + Advisors LLP, Aldrich Wealth LP, Aldrich Retirement Solutions LP, and Aldrich Business Transitions LP.

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