

Employee Navigator HR Administrator Guide

Quick Reference & Best Practices

A practical guide to the Employee Navigator tasks HR administrators perform most often — from onboarding new hires and managing employee benefit changes to processing terminations, reviewing enrollments, and running administrative reports.

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1. Adding a New Hire

Important: If your company has an active payroll feed, do not add new hires directly in Employee Navigator. Add the employee to your payroll system first. The payroll feed will automatically send the employee's information to Employee Navigator.

PATH: Home tab → Quick Links → Add Employee

Employees can be added manually from the Home tab from the **Quick Links** section using the **Add Employee** link.

Company

Welcome back, Heather!

Employee last name, first name, or full SSN

Things to doCompleted

You are all caught up.

Last updated at 3:07:06 PM [Refresh](#)

Quick Links [Customize](#)

Add Employee

Enrollment Editor

Import Employees and Enrollment

Review Insurability Requests

Add Company Note

Add Demo Employee

New Employee Enrollment Forms

Add Employee Note

Open Enrollment Reports

Ad-hoc Reports

Payroll Deductions Report

Manage Saved Report Templates

New Hire Reports

Send Bulk Welcome Email

Send Newly Eligible Email

Termination Report

HR Insights

Org Chart

Demographic Changes

Zywave HR Portal

Add Document

Login Status Report

New Hire Enrollment Status

Newly Eligible Enrollment Status

Incomplete New Hires

Incomplete Newly Eligible

Integrations Dashboard

Employee List

Minimum Required Fields

Items marked with an * in the Add an Employee section are required.

Note: Additional fields may be required depending on how your company is configured for benefit eligibility. For example, if **Classes** are enabled, each new employee must be assigned to the appropriate Job Class before they can view and enroll in benefits. You can review these requirements under **Settings > HRIS Field Tracking**.

After the Basics Are Entered

1. Enter the employee's email address and choose whether to send the **New Hire Registration Email**. This email contains the registration link the employee will use to create their Employee Navigator account and complete their benefit enrollment.

Note: If you choose not to send the email during this step, you can send it later. See "**Send New Hire Registration or Login Email**" for instructions.

The screenshot shows a progress bar at the top with five steps: Personal Info, Employment, Onboarding, Email (selected), and Finish. Below the bar, the question "Send Employee New Hire a registration email?" is displayed. There is an email input field with the placeholder text "Email:" and the example email "newhire@company.com". Below the input field are two buttons: a green "Send" button with a right-pointing arrow, and a blue "No, not now" button.

2. Select **Go to Profile** to add additional demographic information, such as the employee's address.
3. Select **Add Another Employee** to continue onboarding the next hire.
4. Select **Finished** to be taken back to the admin Home page.

The screenshot shows the same progress bar as the previous step, with the "Email" step selected. Below the bar, the heading "Employee New Hire is set up" is followed by the question "What do you want to do next?". There are four options displayed: "Go to profile" (with a person icon), "Go to enrollment" (with a shopping cart icon), "Add another employee" (with a double arrow icon), and "View incomplete employees" (with a list icon). Below these options, the word "or" is centered. At the bottom left, there is a blue "Finished" button.

2. Terminating an Employee

PATH: Employees tab → Employee Management → Actions → Terminate Employment

1. From the **Employees** tab, search for the employee using the search box in the upper right corner of the screen. Select the employee's name to open their profile page.

Home **Employees** Reports Wall ACA PTO Tasks Benefits Payroll Documents Settings

Heather Bebbing

Employees

Overview

24 24 24 24 24 24 24 24 24 24 24 24 24

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul

All Hired Terminated

Recent Events

Employee	Event	Date
Chakraborty, Dinesh	Enrollment changed	09/20/2025
Tamara, Hammond	Enrollment changed	09/20/2025
Cohen-Barrett, Krystal	Enrollment changed	09/20/2025
Avaron, Matsuno	Enrollment changed	09/20/2025
Michaud, Daniel	Enrollment changed	09/20/2025
Kemal, Evren	Enrollment changed	09/20/2025

Employee Stats

New Hires 0

Terminations 0

Net Growth 0.00%

Average Employee Age 39

2. From the employee's profile under **Employee Management**, select **Terminate Employment** under the **Actions** menu.

Dinesh Chakraborty [Add a note](#)

Employee Management Profile Benefits Summary Documents Timeline Integrations

Dinesh Chakraborty

All Employees
dchakraborty@youandassoc.unused

Status

- ✓ HRIS required fields complete
- ✓ Benefits required fields complete
- ✓ EE-entered holds 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).

Open enrollment window has expired.

Employee is not eligible for any newly eligible benefits.

Employee last name, first name, or full SSN

Tasks

Incomplete

Complete

HR Pending

Actions

Terminate Employment

[Modify Enrollments](#)

[Manage ACA](#)

[Manage COBRA](#)

[Unlock Open Enrollment](#)

[Unlock New Hire Enrollment](#)

[Unlock Newly Eligible Enrollment](#)

[Complete New Hire Enrollment](#)

[Complete Newly Eligible Enrollment](#)

[Manage Login/Reset Password](#)

3. Confirm the Employee's Mailing Address and select **Next**.

Terminate Employee [Add a note](#) [Read Support Article](#)

Dinesh Chakraborty

Affected Plans

Employee Information

Dependent Information

Validated Information

- ✓ Address Validated
- ✓ Hire Date on Record
- ✓ Pay Frequency
- ✓ COBRA Exchange Subscriber Group
- ✓ Assigned Assets

Enrollments

- ✓ Plan Termination Rules Complete
- ✓ Pending Enrollments Approved

Dependents

- ✓ SSN, Gender, DOB on record

Please verify the following information

Address

Country

Address 1

Address 2

City

State/Territory

Zip Code

County

Next [Cancel](#)

4. Enter the applicable **Termination Date** and **Termination Reason**.

Important: The termination date should be equal to the last day the employee worked, not the date their coverage should end. Coverage end dates follow the plan's termination rules, set under that benefit plan's Eligibility Rules tab.

Terminate Employee
[Add a note](#)

[Read Support Article](#)

Dinesh Chakraborty

Affected Plans

Employee Information

Dependent Information

Validated Information

Termination Date

Termination Date

What is the Reason for Termination?

Voluntary Termination

Involuntary Termination

Reduction in Force

Retirement

Death of Employee

Gross Misconduct

Next
Cancel

Termination Reasons

- Voluntary Termination
- Involuntary Termination
- Reduction in Force
- Retirement
- Death of Employee
- Gross Misconduct

Important: Gross Misconduct is the only reason that will NOT trigger COBRA. Because this designation has legal implications, we recommend contacting Maddock & Associates before selecting this option to ensure it is appropriate.

What Happens Next

- The employee's status changes to Terminated, shown in red on the Employee Management tab of the employee's profile.
- The Benefits Summary displays all ended plans, the end reason, and coverage end dates under Ended Coverage.
- All enrollment windows and links are greyed out — ended coverage cannot be modified.

Unable to Terminate?

Missing information — typically required by carriers and COBRA TPAs — will block a termination. Select **“Go”** next to any flagged issue to resolve it. Common blockers:

- The employee does not have a hire date on record
- The employee is missing pay frequently.
- Enrolled dependents are missing Gender (Sex), Date of Birth, or SSN
- The employee’s enrolled plan(s) are missing termination rules
- The employee has pending enrollments

3. Send New Hire Registration or Login Email

PATH: Home tab → Quick Links → Send Bulk Welcome Email | Employee's Profile → Manage Login

Employees need two different things depending on where they are in the process: someone who hasn't registered yet needs a registration link, while someone who's already registered just needs their password or username fixed.

For an Employee Who Hasn't Registered Yet

1. From the Home tab, open Quick Links and select Send Bulk Welcome Email.
2. Select the employee(s) who still need to register and confirm the email address on file.
3. Send. The employee receives a link to create their username and password and begin enrollment.

Note: If the welcome email doesn't reach an employee, check the Profile tab first — a missing or incorrect email address is the most common cause. The email can't be delivered without a valid address on file.

For an Employee Who's Already Registered

1. Search for the employee and open their profile.
2. Select Profile, then Manage Login along the left-hand side.
3. Select Send Password Reset Email. The employee receives an email with a link to reset their own password.

Note: Employees can also self-serve without any admin involvement — from the login screen, they can select Forgot Username? or Forgot Password? to receive the reset link directly.

4. Employee Updates (Division / Class / Eligibility Changes)

PATH: Employee's Profile → Profile tab

When an employee changes division, class, or department — or moves between eligible and ineligible status — update it directly on the Profile tab. Employee Navigator treats these as demographic changes.

Note: If your company has demographic change rules configured, the system applies that rule's waiting period. If no rule is configured, the standard new hire waiting period applies instead.

Making the Change

1. Open the employee's Profile tab, update the Class, Division, or Department field, and select Save.
2. In the Change Date Tracking box that appears, enter the Change Effective Date.

Important: A future-dated change pends until that date arrives — the employee won't be able to enroll in newly eligible benefits until then. A past or current date previews the demographic change results immediately, so review that preview carefully: coverage can be dropped as a result of the change.

3. Review the Preview Demographic Change Results screen, then select Yes, Save Changes to confirm, or No, Cancel Changes to back out.
4. Check the employee's Benefits Summary afterward to confirm no coverage was unexpectedly dropped and that any new effective dates are correct.

Adjusting or Canceling a Scheduled Change

A future-dated change shows on the employee's profile as Scheduled Changes. Open it, then select Cancel Changes to undo the request before it takes effect. Canceled changes stay visible in the History log for reference.

5. Rehires

PATH: Search employee → Employee Management → Termination Actions → Rehire

If a former employee returns, rehire them from their existing terminated profile — don't create a new employee record.

1. Search for the employee by name; their terminated record will appear in the results.
2. Open Profile, Employee Management Tab and see Termination Actions along the right-hand side.
3. Under Termination Actions, select the Rehire link.
4. Work through the Rehire wizard, confirming Personal Info and Employment details. Because the employee already exists in the system, these fields default to their prior information — update anything that's changed (pay, job title, class, division, etc.) before continuing.

Note: Rehired employees don't receive a new registration email since they're already registered. Direct them to use their existing username and password, or the Forgot Username? / Forgot Password? links if needed.

Note: A rehire applies the standard new hire waiting period for benefits eligibility unless your company has rehire rules configured. Ask your Maddock representative if you're not sure which applies to your group.

6. Reviewing Life Events

PATH: Home → Pending HR Approval

Events set to Require Approval stay in a **Pending** status until HR or the Broker reviews them. Requests appear under the **Home** tab in the Pending HR Approval section. Select the employee's name to open the review screen.

From the review screen, choose one of the following:

- Cancel This Enrollment Change Request — cancels the request; no coverage changes are applied.
- HR Approve Pending Life Event Enrollments — approves the requested changes.
- HR Decline Pending Life Event Enrollments — denies the request; no coverage change is applied.

7. Employee Benefits Summary

PATH: Search EE → Benefit's Summary

Use the **Benefits Summary** to check an employee's elected benefits, effective dates, coverage level, benefit amounts, and benefit costs.

The Four Enrollment Periods in Employee Navigator

Period	What Appears Here
Current Period	Active enrollments — from import, New Hire/Newly Eligible elections, or the Modify Current Enrollments link.
Open Enrollment	Elections made during Open Enrollment that haven't closed yet. Moves to "Current Period" once OE is closed.
Pending Period	Enrollments awaiting completion ("Pend Until All Completed") or HR approval ("Pend Until HR Approves").
History	Old enrollments that have ended and been replaced. Only inactive plans and enrollments will appear here.

Note: Move a stuck enrollment from Pending to Current by having the employee complete enrollment or contact your Maddock Technology Specialist for assistance.

Employee Benefits Summary Quick Access

- **View Details** (upper left) opens the Employee View of the Benefits Summary.
- **Print** (upper right, next to the dropdown) prints the summary.

Data Included on the Summary

- Plan Type, Carrier, Plan Name
- Coverage and Effective Date
- Cost Per Pay and Contributions (Defined Contributions)
- Benefit (amount)

All dependents and their enrolled plans appear on the summary. HSA/HRA contributions, Cafeteria contributions, Retirement contributions, and Ended Enrollments appear at the bottom.

8. Running Reports in Employee Navigator

Employee Navigator's Ad Hoc Reports area covers most day-to-day reporting needs. The three reports below are the ones you'll use most often.

Note: Once you configure a report to your liking, save it as a template. Click Save, give the report a name, and it will appear under Saved Report Templates for future use. For even faster access, open Saved Report Templates and click the star next to any reports you use regularly. Those reports will then be available directly from the main Reports menu.

Employee Census Report

PATH: Reports → Ad Hoc Reports → Row-Based Report

1. From the Reports tab, select Row-Based Report under Ad Hoc Reports.
2. Under Fields, check every data point you want pulled — toggle to the Enrollment section to add plan and coverage fields.
3. Under Options, choose whether to include dependents and what to exclude (declined enrollments, ended enrollments, not enrolled), and whether you want Current or Open enrollment data.
4. Select View to preview the report, then download it to export it to Excel.

Payroll Deductions Report

PATH: Reports → Ad Hoc Reports → Payroll Deductions Report

Use this report to pull per-pay-period deduction amounts by plan for payroll processing.

1. Use the Payroll Deductions Report to create a roster of active enrollments with payroll deductions as of a selected effective date.
2. Go to the company's Reports tab.
3. Under Ad Hoc Reports, select Payroll Deductions Report.
4. Under Fields, use the drop-down to toggle between Employee and Enrollment fields.
5. Under Employee, select the demographic fields you need, such as name and Primary Payroll Identifier.
6. Under Enrollment, select fields such as Benefit, Plan, Relationship, Coverage Level, EE Cost, ER Cost, and payroll deduction codes as needed.
7. Under Options, enter the applicable Effective Date.
8. Select View to generate the report, then download it to export it to Excel.

Open Enrollment Changes Report

PATH: Reports → Open Enrollment Reports → Open Enrollment Changes

1. Choose the Open Enrollment Effective Date you want to report on and optionally filter by carrier.
2. Check the types of changes you want to see — Benefit Amount, Coverage Level, Added/Dropped Coverage or Dependents, Cost, Demographic Information, Coverage Start Date — then select Generate Report.
3. View the results Fullscreen, or export to Excel, CSV, or Print.

9. Contact Us for Additional Support

PATH: Settings → Company Profile → Agency & Company Contacts

Note: For the fastest service, please contact your dedicated agency contacts directly.

Agent (Benefits Advocate)

Your primary contact for employee enrollments, terminations, and general customer service support outside of your group's open enrollment period. Your Benefits Advocate is familiar with your account, plan setup, and history, so contacting them directly is typically the fastest way to get assistance.

Account Manager (Implementation Manager)

Manages the open enrollment process, including carrier setup and enrollment-related coordination.

Eligibility Manager (Technology Specialist)

Manages your Employee Navigator setup and provides technical support.

Finding Your Dedicated Agency Contact Information in Employee Navigator

1. From the top navigation, select Settings.
2. Select Company Profile.
3. Select the Agency & Company Contacts tab.

Your dedicated agency team is listed under Broker Contact, along with their direct phone numbers and email addresses.

Note: This same Agency and Company Contacts screen also lists your HR Admins, Payroll Contact, and EDI Contacts currently on file.