

Ease to Employee Navigator Migration Checklist

Use this checklist to help prepare for and complete an Ease to Employee Navigator group migration. It outlines key readiness steps, migration tasks, and post-migration items to review before moving forward in Employee Navigator.

PRE-MIGRATION READINESS

- Employee Navigator brokerage subscription is confirmed
- Login access to Ease is confirmed
- Login access to Employee Navigator is confirmed
- Group is not currently in open enrollment
- Migration timing is planned at least two months before or two months after open enrollment, when possible

REVIEW MIGRATION READINESS IN EASE

- Open the Employee Navigator Migration Dashboard
- Search for the group
- Refresh the readiness status
- Open the readiness report
- Review all errors and warnings

RESOLVE BLOCKING ERRORS IN EASE

- Review and resolve company errors
- Review and resolve plan errors
- Review and resolve employee errors
- Process any incomplete managed changes
- Refresh readiness status to confirm no blocking errors remain

REVIEW WARNINGS

- Review all non-blocking warnings
- Confirm whether any partner access warnings need to be addressed
- Confirm whether any plan-related warnings need additional review
- Confirm the group is marked Ready for Migration

INITIATE MIGRATION

- Select the company
- Click Migrate
- Confirm the destination brokerage
- Log in to Employee Navigator
- Confirm the migrated group appears in Employee Navigator

POST-MIGRATION REVIEW

- Review the migration report
- Verify company information
- Verify employee records
- Verify benefit plans
- Verify documents
- Reconnect or reset integrations in Employee Navigator

FINAL CONFIRMATION

- Group is read-only in Ease
- Integrations are disabled in Ease
- Login access to Ease is confirmed for reference purposes
- Login access to Employee Navigator is confirmed
- All future updates will occur in Employee Navigator
- CRC Benefits support access has been confirmed, if applicable