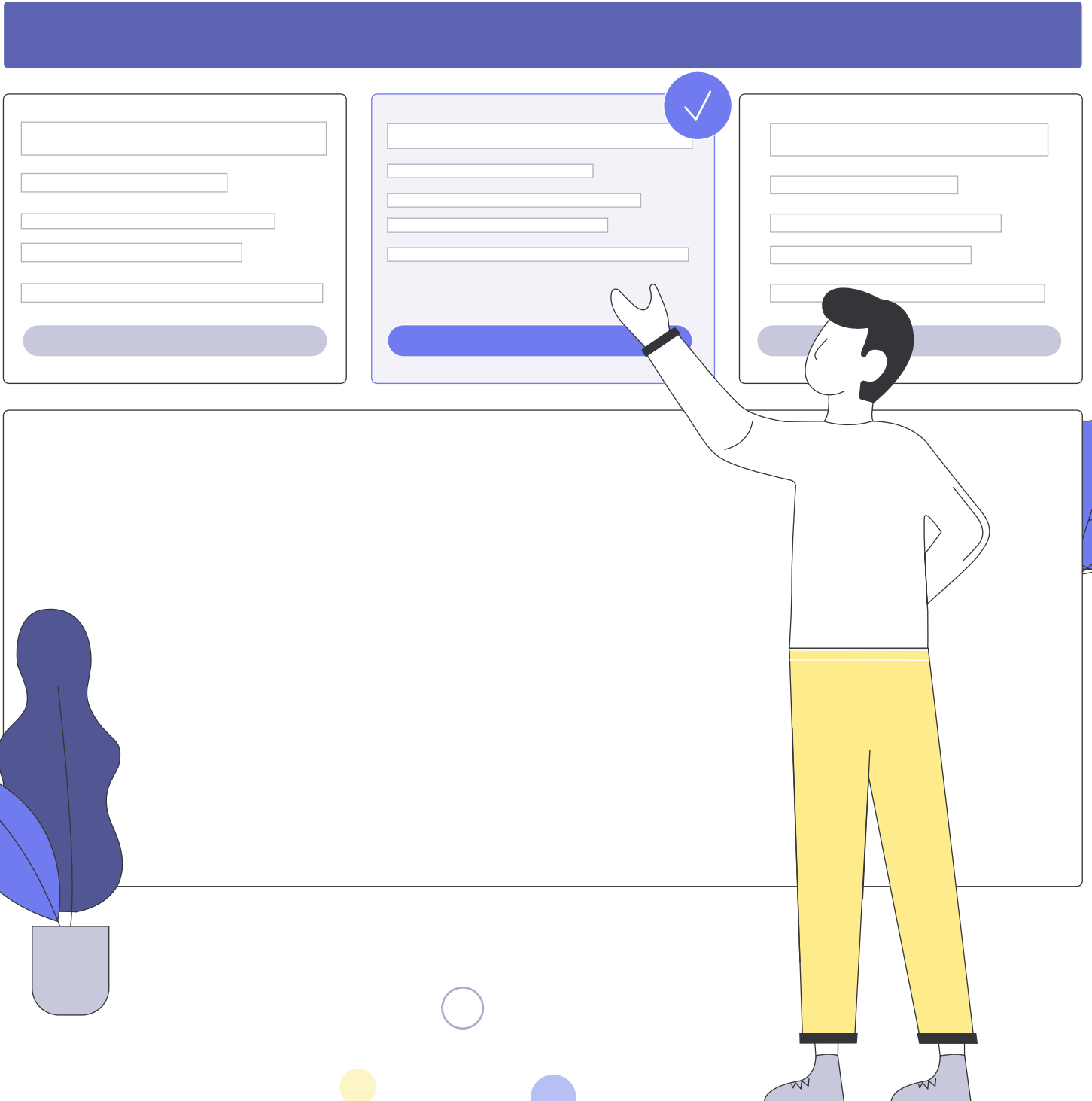


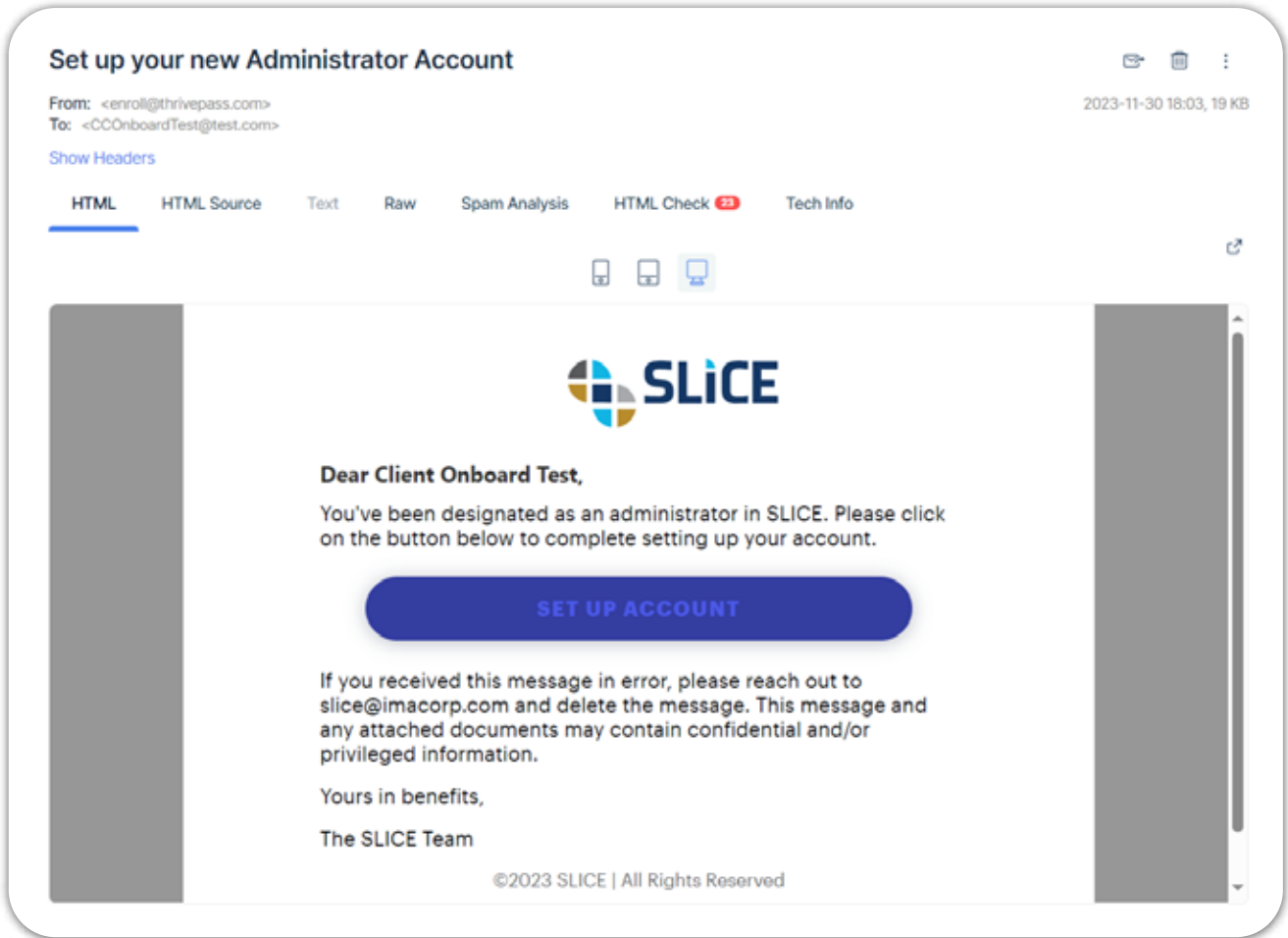
ENROLL GUIDE

EMPLOYER REGISTRATION AND CONTRACT SIGNING

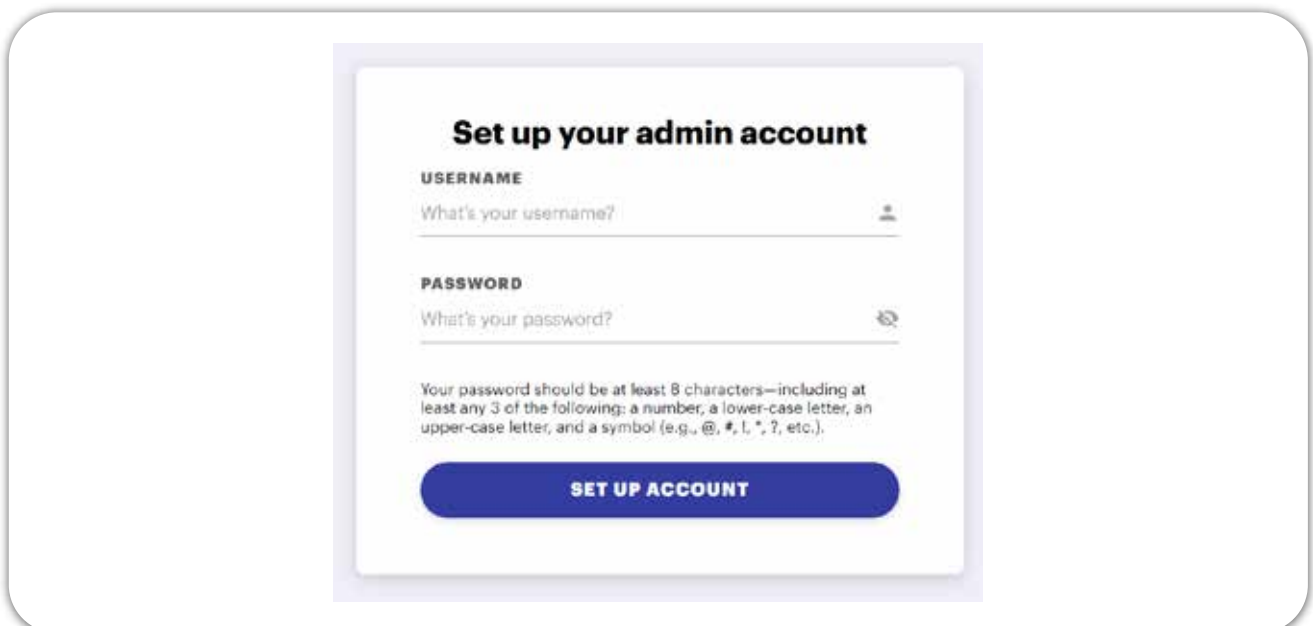


Employer registration and contract signing.

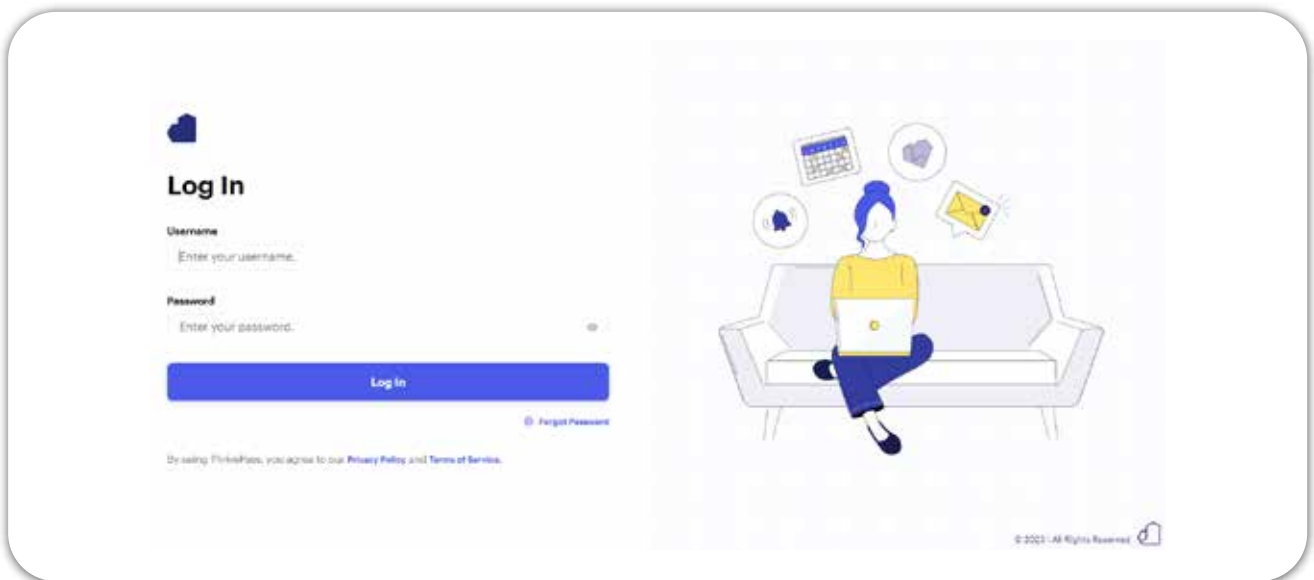
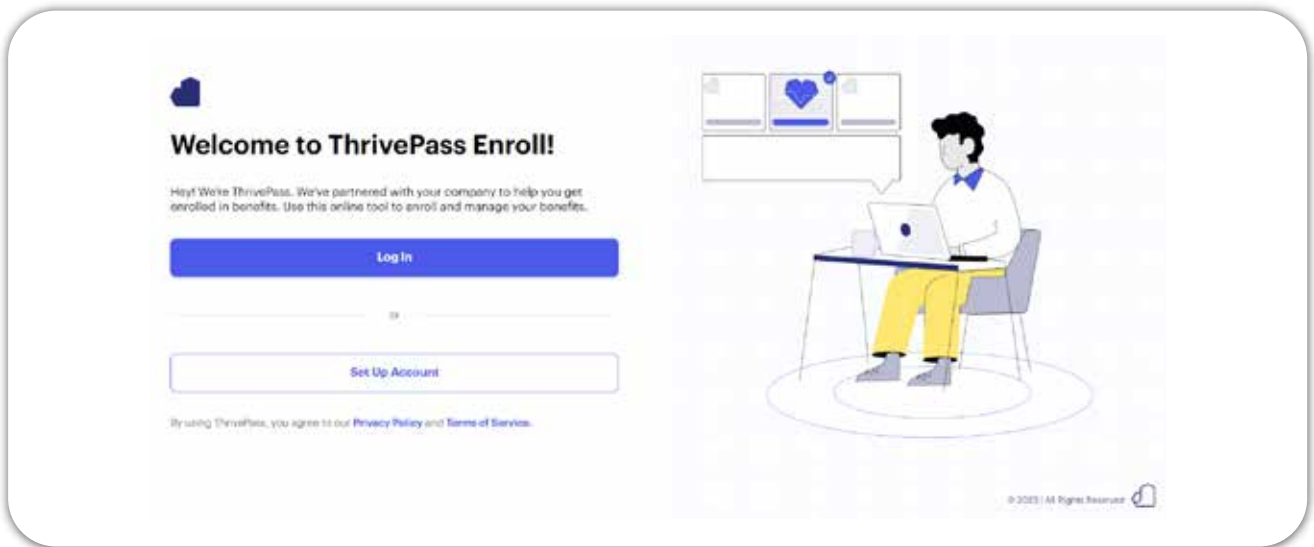
STEP 1: The employer primary contact will receive a registration email to register in SLICE.



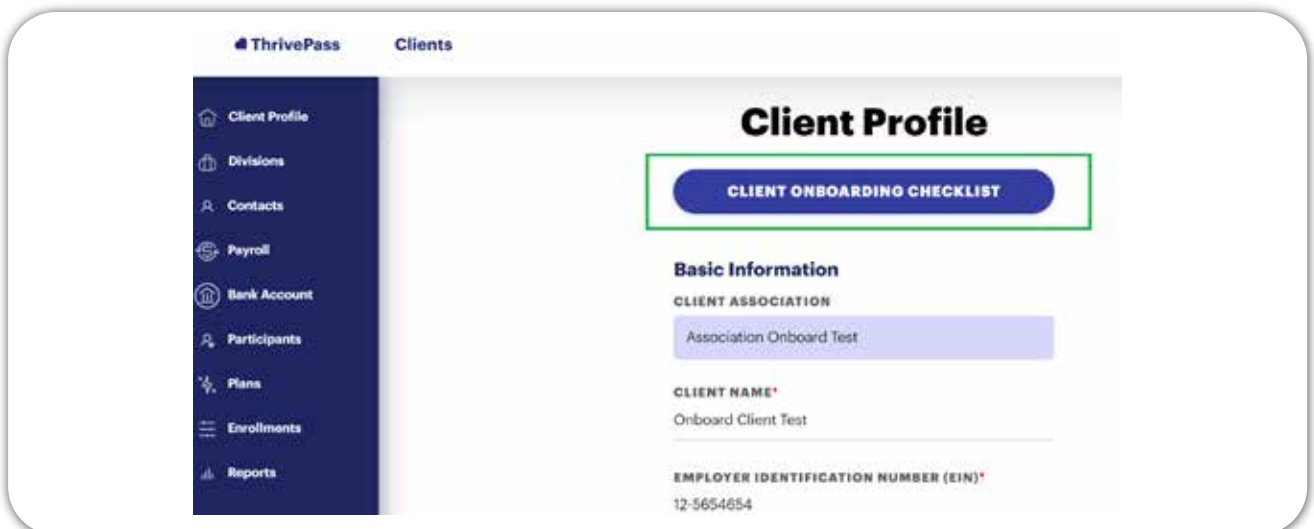
STEP 2: Click on the link in the registration email. Enter the USERNAME and PASSWORD and select the "SET UP ACCOUNT" button to complete the registration process.



STEP 3: Click on the “Log In” button and enter the registered USERNAME and PASSWORD to login to the Client Portal.



STEP 4: Click on the “CLIENT ONBOARDING CHECKLIST” button.



STEP 5: Select the “Yes” radial button.

Client Onboarding Checklist ×

Step 1

ARE YOU OFFERING ICHRA FOR YOUR EMPLOYEES?

Yes

No

INITIATE DATA TRANSFER

STEP 6: Review and complete all the steps in the checklist.

Client Onboarding Checklist ×

Step 1

ARE YOU OFFERING ICHRA FOR YOUR EMPLOYEES?

Yes

No

STEPS TO BE COMPLETED FOR OPEN ENROLLMENT

1. Complete the client profile.
2. Review and update the Division setup. Add more divisions if required.
3. Create the Payroll Schedule.
4. Check all the payroll schedules are attached to appropriate divisions including the default division created during client creation.
5. Review the primary contact and add more contacts if required.
6. Complete setting up Bank Accounts.
7. Complete the Defined Spend Plan Setup.
8. Click on 'Initiate Data Transfer' button.
9. This will initiate the data transfer of the Defined Spend setup to Slice.
10. After data transfer is initiated and completed, read the PDF and Sign the Contract to start the Open Enrollment.

All of the above steps have been reviewed.

INITIATE DATA TRANSFER

STEP 7: When all tasks through step 7 are changed to green – Select the checkbox beneath step 10 and click the “INITIATE DATA TRANSFER” button.

Client Onboarding Checklist

Step 1 ✕

ARE YOU OFFERING ICHRA FOR YOUR EMPLOYEES?

Yes

No

STEPS TO BE COMPLETED FOR OPEN ENROLLMENT

1. Complete the client profile.
2. Review and update the Division setup. Add more divisions if required.
3. Create the Payroll Schedule.
4. Check all the payroll schedules are attached to appropriate divisions including the default division created during client creation.
5. Review the primary contact and add more contacts if required.
6. Complete setting up Bank Accounts.
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8. Click on 'Initiate Data Transfer' button.
9. This will initiate the data transfer of the Defined Spend setup to Slice.
10. After data transfer is initiated and completed, read the PDF and Sign the Contract to start the Open Enrollment.

All of the above steps have been reviewed.

INITIATE DATA TRANSFER

STEP 8: Read through the agreement that will open in the adjacent tab and select the SIGN AND SUBMIT button.

4. Check all the payroll schedules are attached to appropriate divisions including the default division created during client creation.

5. Review the primary contact and add more contacts if required.

6. Complete setting up Bank Accounts.

7. Complete the Defined Spend Plan Setup.

8. Click on 'Initiate Data Transfer' button.

9. This will initiate the data transfer of the Defined Spend setup to Slice.

10. After data transfer is initiated and completed, read the PDF and Sign the Contract to start the Open Enrollment.

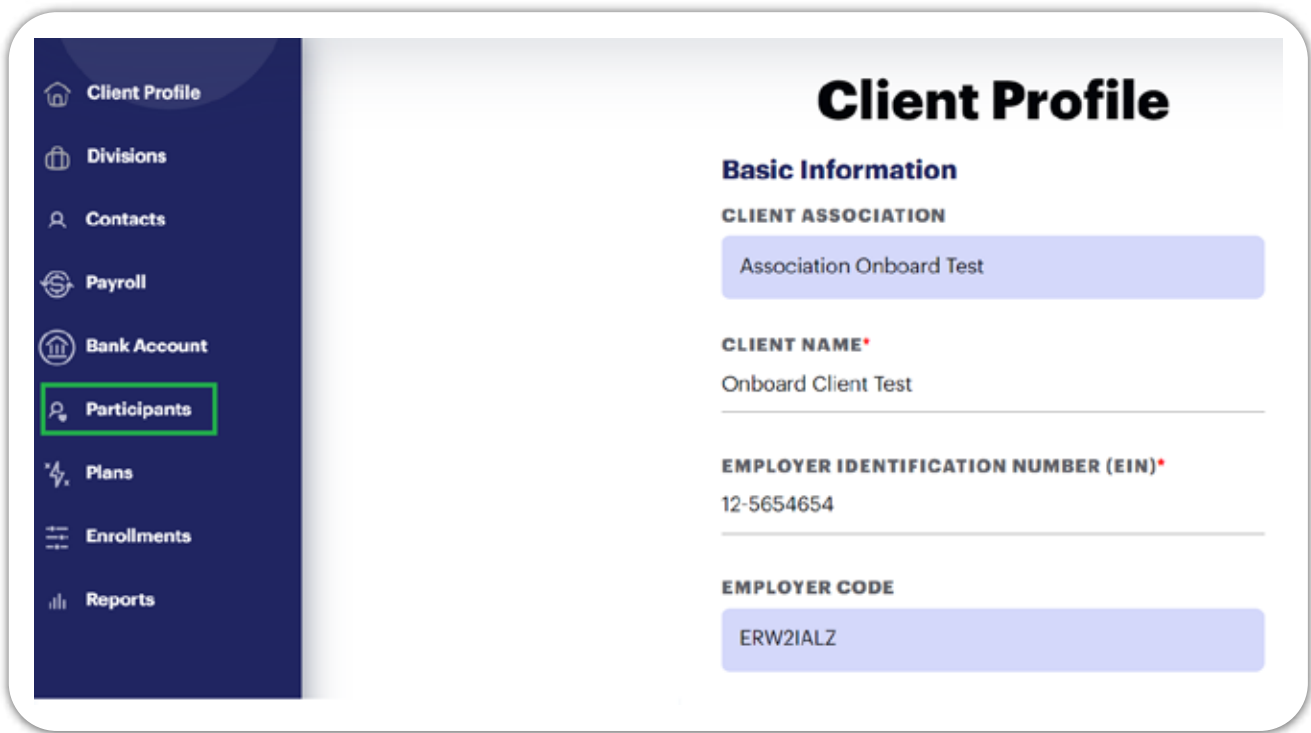
All of the above steps have been reviewed.

ELECTRONIC SIGNATURE

[Large grey box for electronic signature]

SIGN AND SUBMIT

STEP 9: Upload/ Manually set up participants by clicking on the “Participants” menu on the left-hand side of the screen.



STEP 10: Once the Association Administrator initiates Open Enrollment – Employees will receive the Open Enrollment email with instructions to register and complete the election process.