



Changing TPA's in Employee Navigator

Steps to Changing TPA's in Employee Navigator

The broker can make the connection in EN anytime with HRPro but you will want to maintain your connection with the other TPA until fully live with HRPro. A broker can have multiple connections (integrations) so making the connection with HRPro won't disconnect you from the other TPA.

We recommend that both integrations stay active (even overlap a bit) until HRPro is officially live with the client's integration, we don't want any data being missed especially with COBRA. When the broker/client is no longer needing the services of the old TPA, the broker has the ability to disconnect the integration so HRPro is the only live connection. Below is more detailed information:

Changing vendors

Here are some pointers to keep in mind and guide you through this switch.

1. Contact the existing Vendor to ensure they are generating current elections for your group in the Vendor Portal. Let them know you are planning to End participation as of X date.

1. Do NOT end participation with the existing vendor right away as this will automatically sever the connection for existing data. You must wait until the plan end date. We STRONGLY advise discussing this with them and determining the best time to end the participation. You can connect with the new vendor while keeping the connection with the existing vendor.

2. Inform HRPro when your client is in Open Enrollment and when their administration end date is scheduled so they are aware if they need to pull OE elections manually or when they will be received on their scheduled file.

1. REMEMBER to exclude plans as needed from both connections.
 - I. Example 1: If employee John has a current election but did not elect in the new plan year, you would not want the new vendor to receive John's information on their file so you would want to exclude the current (soon to be prior) plans from the new vendor connection.
 - II. Example 2: If employee Mary has an OE election but not a current election, you would not want the existing vendor to receive Mary's OE election so you would want to exclude the new plans from the existing vendor connection.