

THREE WAYS TO TRANSFER EMPLOYEE INFORMATION

Three ways to transfer employee information	Benefits	Drawbacks
Digital enrolment with DocuSign	<ul style="list-style-type: none"> ✓ Simple: Paper-free, fully digital solution ✓ Fast: Employee and employer can complete the form concurrently. Employees can verify all the information and can only send in completed forms. ✓ Easy: No physical documents need to be distributed and collected. 	<ul style="list-style-type: none"> ✗ The plan administrator needs to launch a new form for each employee. ✗ An email notification is sent to the plan administrator with each completed form. ✗ The plan administrator needs to follow-up with the members to collect their completed forms.
Employee data spreadsheet, with 2 options: <ol style="list-style-type: none"> 1. Completing Empire Life's data template 2. Forwarding the data spreadsheet from the prior insurer, including beneficiary designations 	<ul style="list-style-type: none"> ✓ Simple: required information is available on most current insurer platforms. ✓ Fast: usually generates good data quality, so fewer corrections. Especially, when you can forward an employee data spreadsheet from a prior insurer. ✓ Easy: employees don't need to complete the enrolment form. 	<ul style="list-style-type: none"> ✗ Employee data from the previous plan may not always be up to date. ✗ This option does not allow employees to change current selections or include updates to their personal information. <p>Empire Life's data template:</p> <ul style="list-style-type: none"> ✗ The plan administrator needs to complete all the employee data in the spreadsheet, without the help of the employees. ✗ The plan member needs to complete a separate beneficiary designation form or enrolment form.
Scanned copies of enrolment forms	<ul style="list-style-type: none"> ✓ Simple: employees fill in their own enrolment form. ✓ Easy: no need to mail in the original paper copies to Empire Life. 	<ul style="list-style-type: none"> ✗ Completed forms need to be collected from every employee. ✗ The plan administrator also needs to complete each form. ✗ Follow up for missing or unclear information from the employees. ✗ Longest wait time and longer processing time.

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GRP-3019-EN-04/21

