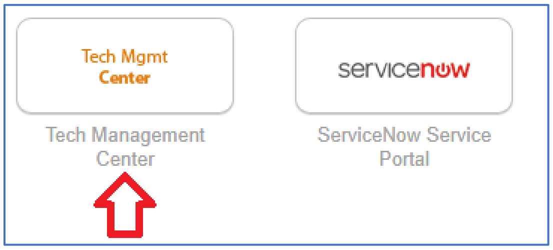
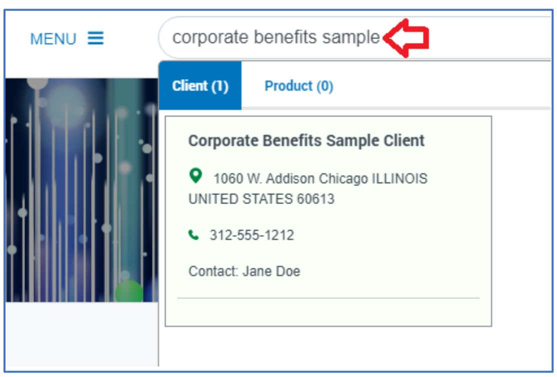
Open Enrollment Landing Page Setup Instructions

1) Click on the Tech Management Center Okta tile (soon to be re-branded as NFP Connect. New NFP Connect Okta tile image displayed below) from your Okta home page (https://nfp.okta.com/):



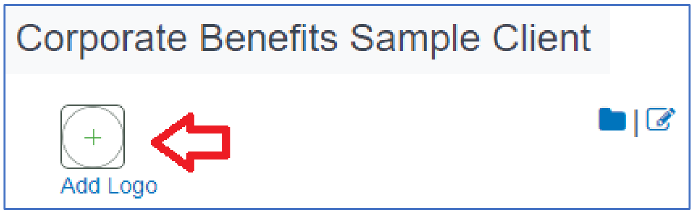
2) Search for the client you use to create an Open Enrollment Landing page in the global Tech Management Center search box:



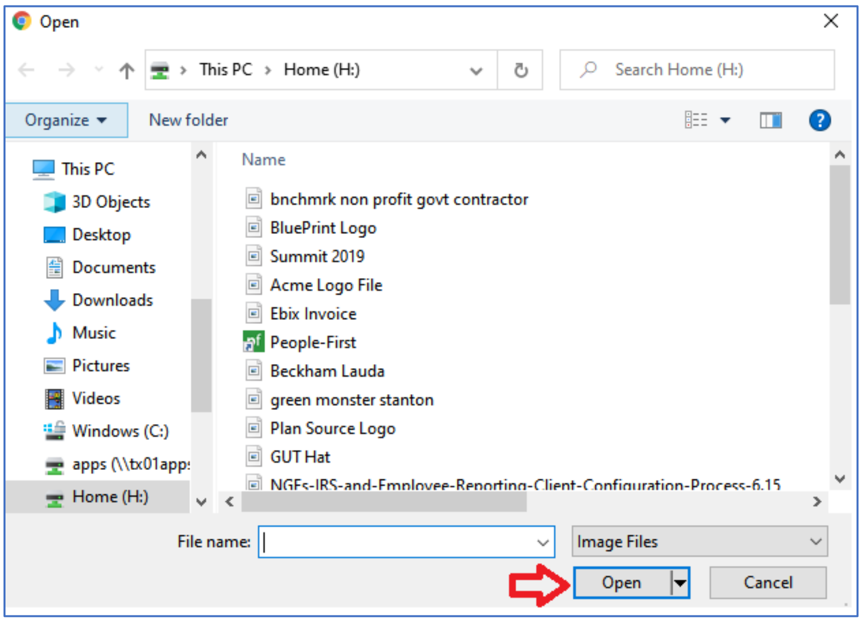
3) Add a client logo

If client logo is not already aligned to the client record, you can do so with the following steps (**Note: the size of a client's logo image file is constrained to a max height of 60 pixels and a max width of 120 pixels)**:

(a) Click on the Add Logo icon found below the client name

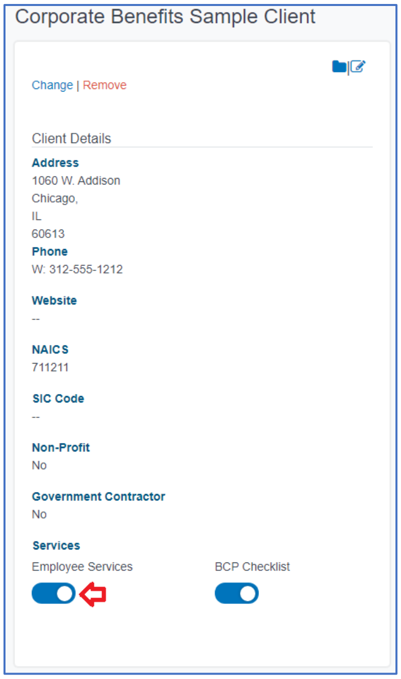


(b) Choose the location from where to import the logo image file and click Open

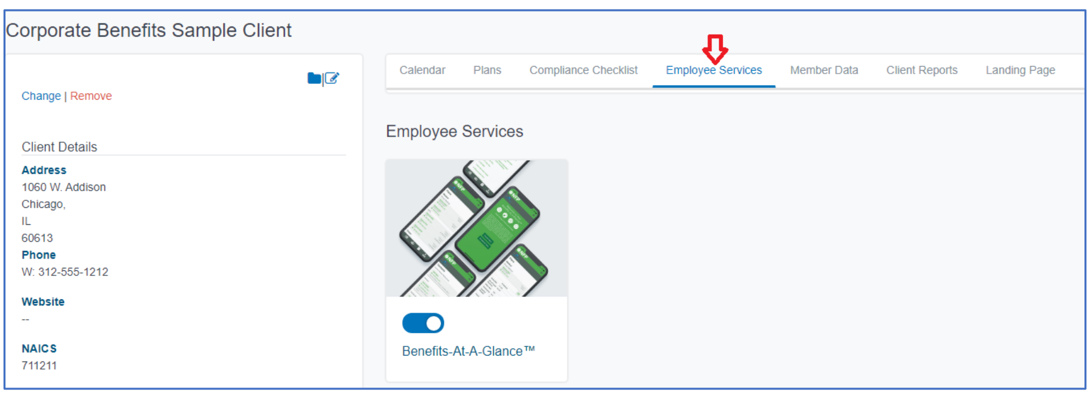


4) Toggle the Employee Services radio button to on (color will change from grey to blue):

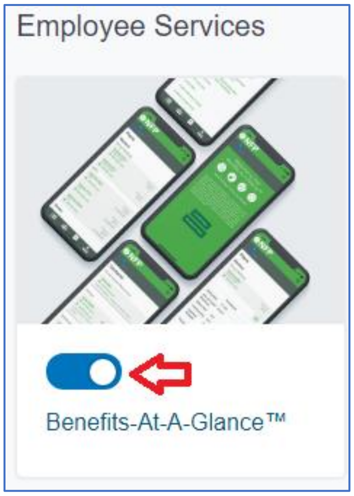
Open Enrollment Landing Page Setup Instructions



Once Employee Services radio button is toggled to on, a new tab, Employee Services, will appear:

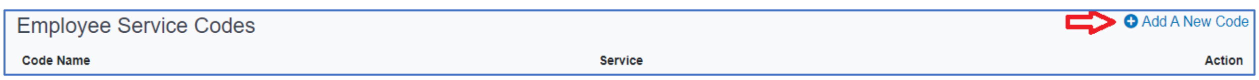


5) Toggle the Benefits-At-A-Glance radio button to on (color will change from grey to blue):

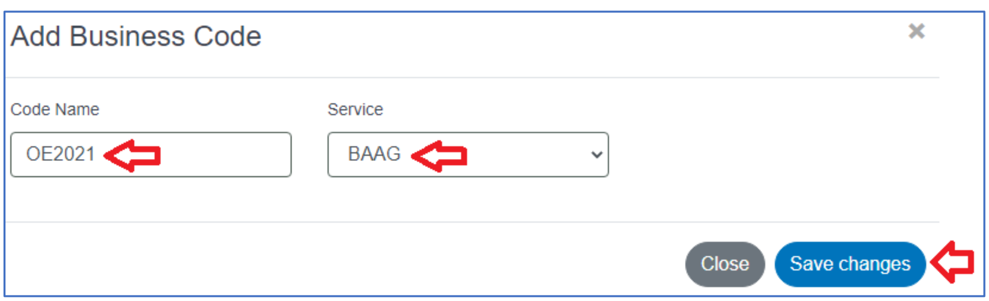


6) Define all of the available Employee Service Codes for the client. Employee Service Codes represent distinct divisions or classes of benefits offered to a group of employees (e.g. union vs. non-union, salaried vs. hourly, New York employees vs. Chicago employees, etc.). **The advisor is responsible for determining the number of employee services codes required and their corresponding naming convention for each client group**. Ultimately, each employee service code value will correspond to its own Open Enrollment Landing Page.

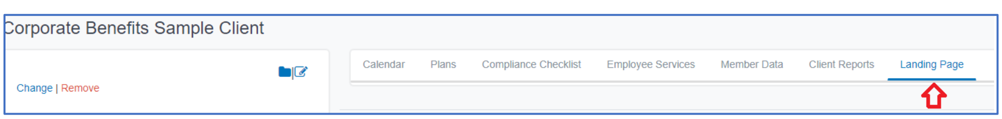
(a) Click on the Add a New Code icon:



(b) Enter the Code Name in the Add Business Code screen, select 'BAAG' from the Service drop down menu, and click on the Save changes button:



7) Click on the Landing Page:

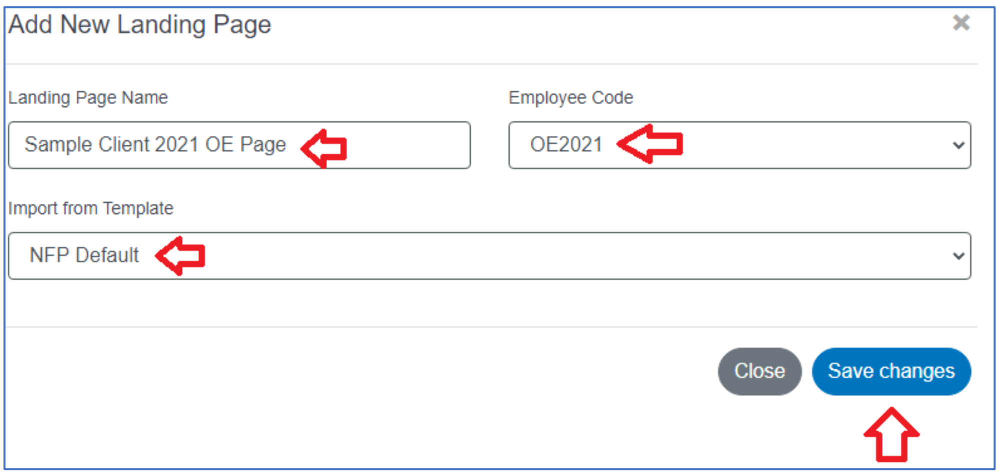


Open Enrollment Landing Page Setup Instructions

8) Align the Employee Service/business code created in step 5 (b) to the Open Enrollment Landing page:

(a) Enter the name for the Landing Page
(b) Select the appropriate Employee Code from the drop down menu
(c) Select 'NFP Default' from the Import from Template drop down menu
(d) Click on the Save changes button

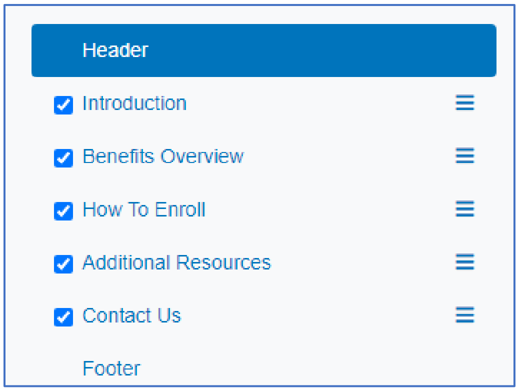
Note: for the creation of the first Open Enrollment Landing Page, you will need to select 'NFP Default' from the Import from Template drop down menu. You will have ability in later stages to create your own template to re-use for the creation of additional Open Enrollment Landing Pages.



9) Adding Open Enrollment Landing Page Content

In this step, an advisor can add the content that will be displayed on the Open Enrollment Landing Page specific to a given client and a specific set of employees based upon their Employee Service/Business Code. The left-hand navigation displays the various sections to be displayed on the Open Enrollment Landing Page (based upon selecting 'NFP Default' in step 7):

(a) Header
(b) Introduction
(c) Benefits Overview
(d) How to Enroll
(e) Additional Resources
(f) Contact Us
(g) Footer

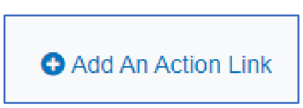


10) Adding/Editing Header Section Content:

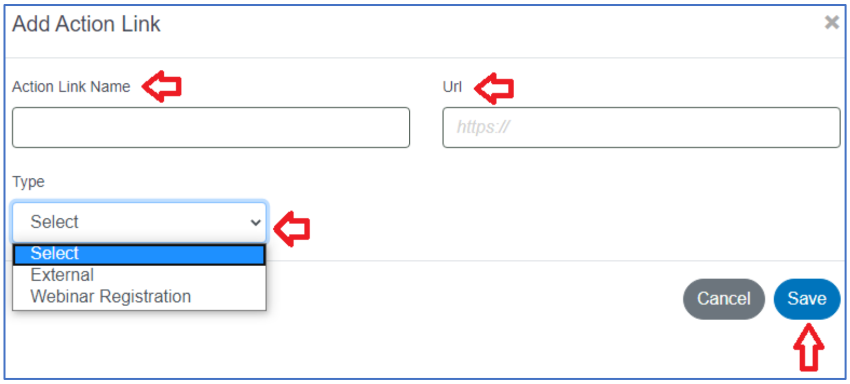
(a) **Name of Client** – name of the client will automatically default
(b) **Show Logo** – if this box is checked, the client logo will appear on the Open Enrollment Landing Page
(c) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(d) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(e) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
(f) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported
(g) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
  (i) *External Actions Links* – is any external website hyperlink or URL address
  (ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

<u>To Add An Action Link</u>:

(a) Click on the Add an Action Link icon:



(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

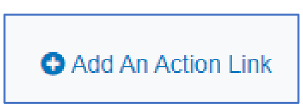


11) Adding/Editing Introduction Section Content:

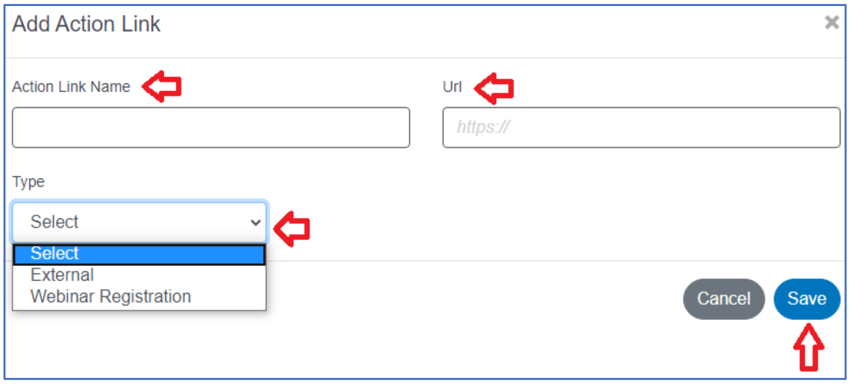
(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
(i) *External Actions Links* – is any external website hyperlink or URL address
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

<u>To Add An Action Link</u>:

(a) Click on the Add an Action Link icon:



(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

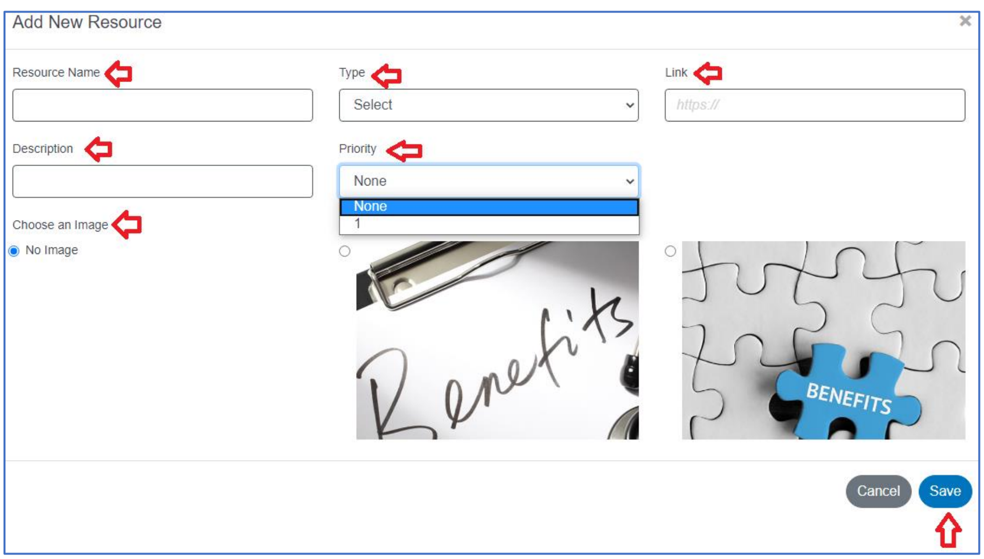


(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

<u>To Add A Resource</u>:

(i) Click on the Add A Resource icon:

(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).



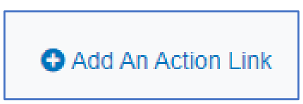
(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

12) Adding/Editing Benefits Overview Section Content:

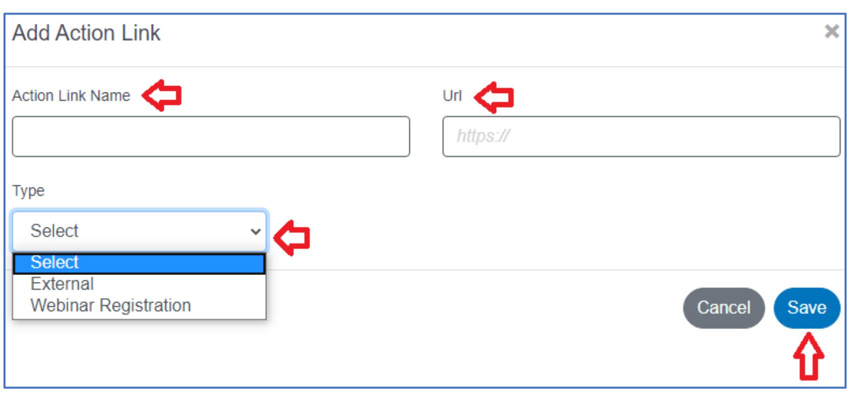
(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
(i) *External Actions Links* – is any external website hyperlink or URL address
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

(a) Click on the Add an Action Link icon:



(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:

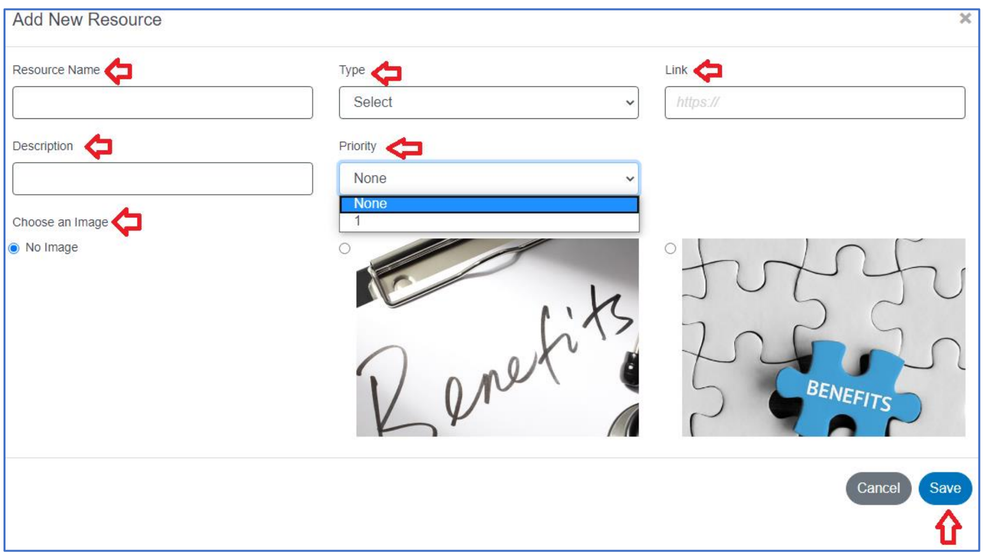


(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

<u>To Add A Resource</u>:

(i) Click on the Add A Resource icon:

(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).



(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

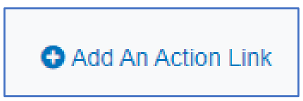
13) Adding/Editing How to Enroll Section Content:

(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page

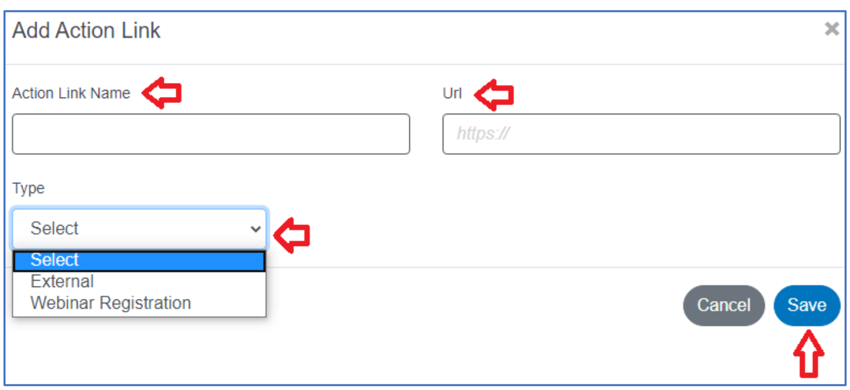
(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
(i) *External Actions Links* – is any external website hyperlink or URL address
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

(a) Click on the Add an Action Link icon:



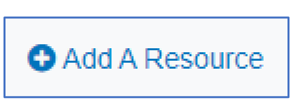
(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:



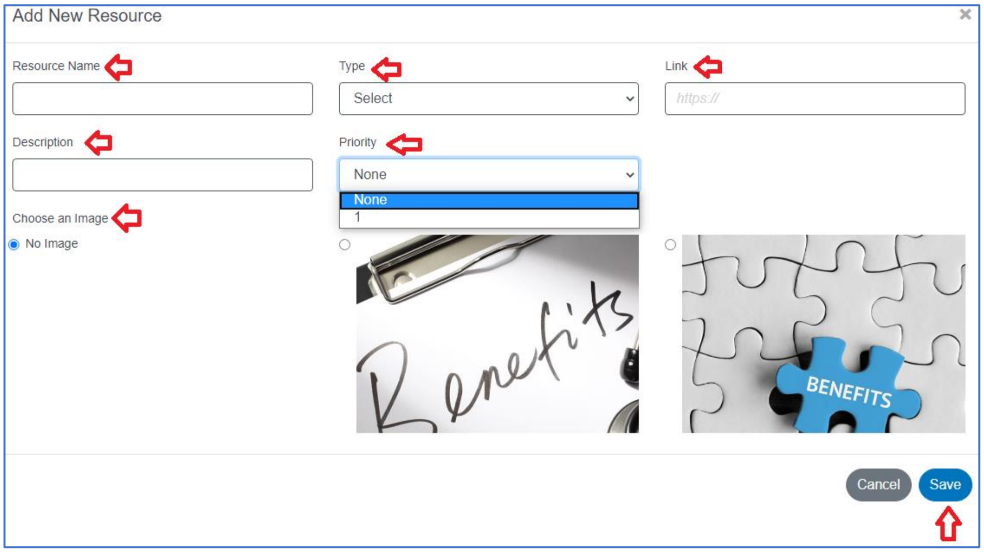
(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing Page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is a drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).



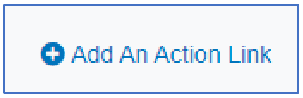
(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

14) Adding/Editing Additional Resources Section Content:

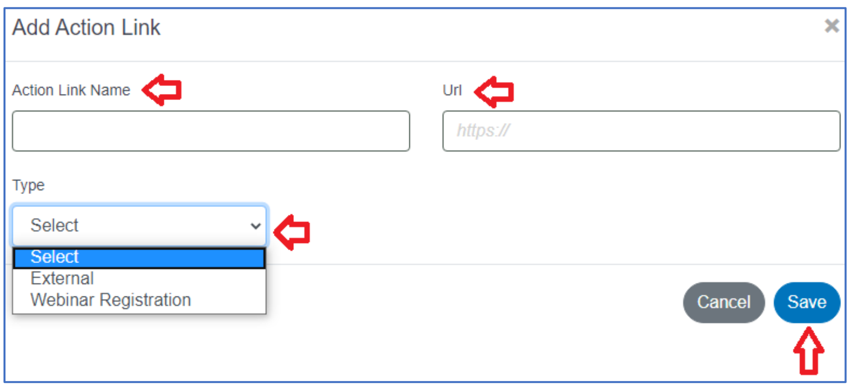
(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
(i) *External Actions Links* – is any external website hyperlink or URL address
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

To Add An Action Link:

(a) Click on the Add an Action Link icon:



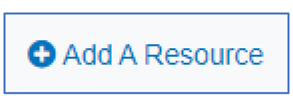
(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:



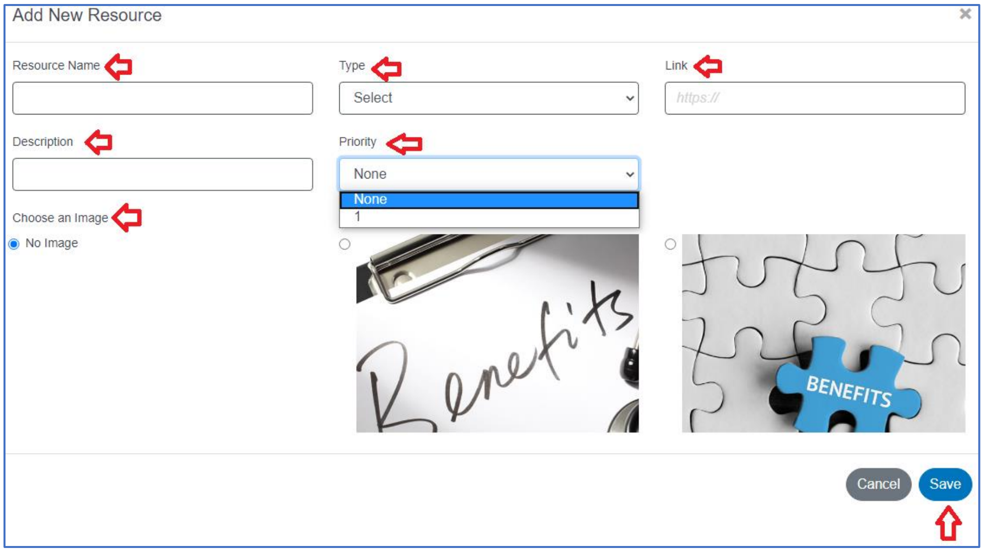
(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

To Add A Resource:

(i) Click on the Add A Resource icon:



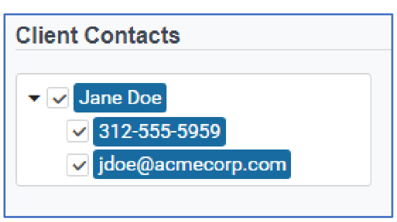
(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).



(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

15) Adding/Editing Contact Us Section Content:

(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
(e) **Client Contacts** – for those offices on the latest version of Salesforce, client contacts contained within Salesforce will automatically appear in this section. If you choose to have the client contact and their contact info appear on the Open Enrollment Landing Page, simply check the box(es) of which information you would like displayed: name, email address, and/or phone number.

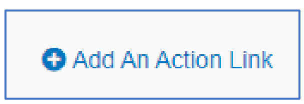


(f) **Additional Contacts** – for those contacts not listed in Salesforce, you can click on the Add A Contact icon to add an additional contact. However, if a client contact is not in Salesforce and should it be, you should enter the client contact information in Salesforce since Salesforce is the system of

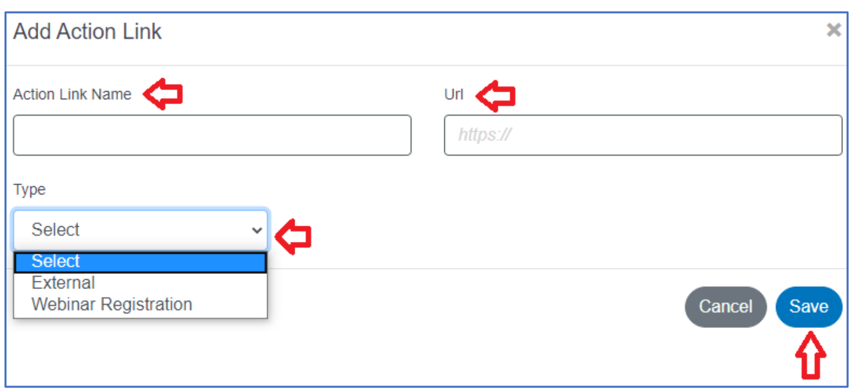
record for this type of information. An automated job runs every few hours to "synch" client and contact record information between Salesforce and the Tech Management Center (soon to be re-branded NFP Connect).
(g) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
(h) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
(i) *External Actions Links* – is any external website hyperlink or URL address
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

<u>To Add An Action Link</u>:

(a) Click on the Add an Action Link icon:



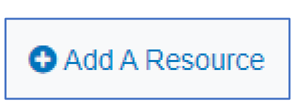
(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:



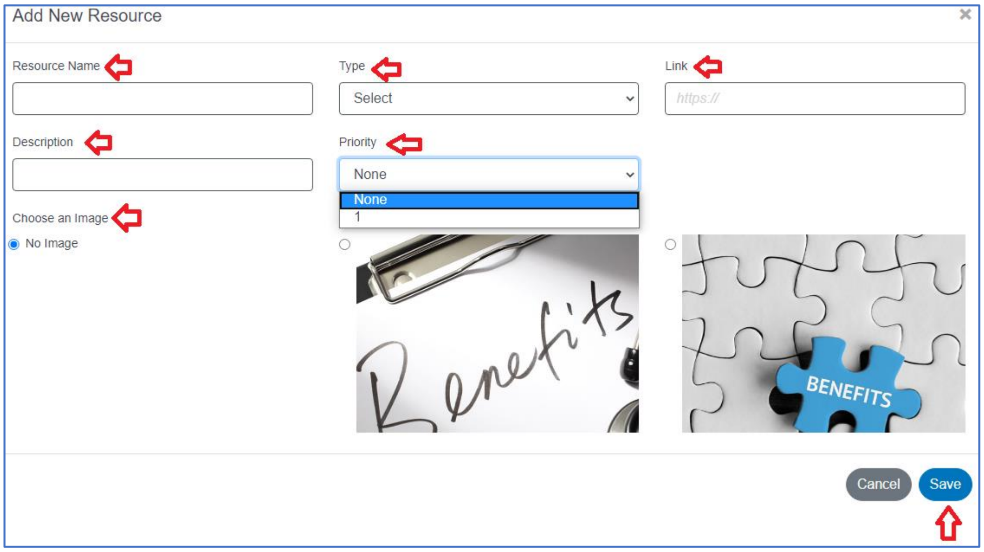
(i) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

<u>To Add A Resource</u>:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).



(j) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

16) Adding/Editing Footer Section Content:

(a) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported

(b) **Select Theme** – advisors will have the ability to modify with some specificity the theme color based upon the Red Blue Green Alpha (RBGA) or HEX color system. The RGBA color system is the three-channel RGB color model supplemented with a fourth alpha channel. Alpha indicates how opaque each pixel is and allows an image to be combined over others using alpha compositing, with transparent areas and anti-aliasing of the edges of opaque regions. A color HEX code is a hexadecimal way to represent a color in RGB format by combining three values – the amounts of red, green and blue in a particular shade of color.

<u>To Select A Theme Color</u>:

(i) Click anywhere in the Theme Color test box

(ii) Modify the color scheme by either sliding radio bar from left to right, entering specific red, green, blue, and alpha numeric values, dragging the radio button from right to left to change the alpha percentage value, or clicking on the up/down arrows next to the A (alpha field) to convert the color scheme to HEX .

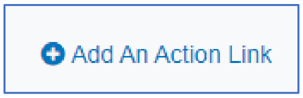
17) Adding/Editing New Section Content:

This set of features allows advisors to create a customized section of content to be displayed on the Open Enrollment Landing page.

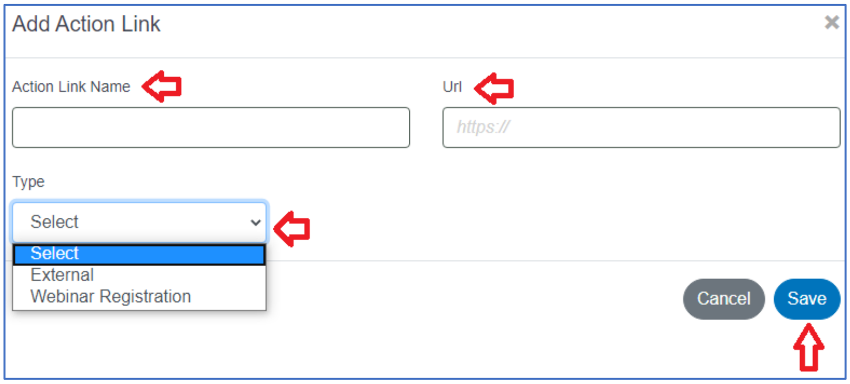
(a) **Section Name** – enter the name of the section. Once it's changed from the default value, the new value will not update in the left-handing navigation, but also on the Open Enrollment Landing Page
(b) **Section Title** - enter the name of section title. Once it's changed from the default value, the new value will update on the Open Enrollment Landing Page
(c) **Section Description** - enter the description of the section. Once it's changed from the default description, the new description will update on the Open Enrollment Landing Page
(d) **Show in Menu?** – clicking the checkbox will display this section on the top Menu bar of the Open Enrollment Landing Page
(e) **Choose a Background Image** – advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a background image. External background images cannot be imported.
(f) **Action Links** – actions links are hyperlinks that will be displayed on the Open Enrollment Landing Page. There are two types of action links: external and webinar registration:
(i) *External Actions Links* – is any external website hyperlink or URL address
(ii) *Webinar Registration Links* – is any hyperlink to an online webinar URL address. This will enable any visitor to the Open Enrollment Landing page to register with their name and email address to attend an online webinar.

<u>To Add An Action Link</u>:

(a) Click on the Add an Action Link icon:



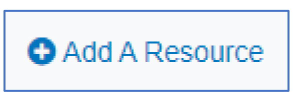
(b) Enter the Action Link Name, URL, select the Type from the drop down menu, and click on the Save button:



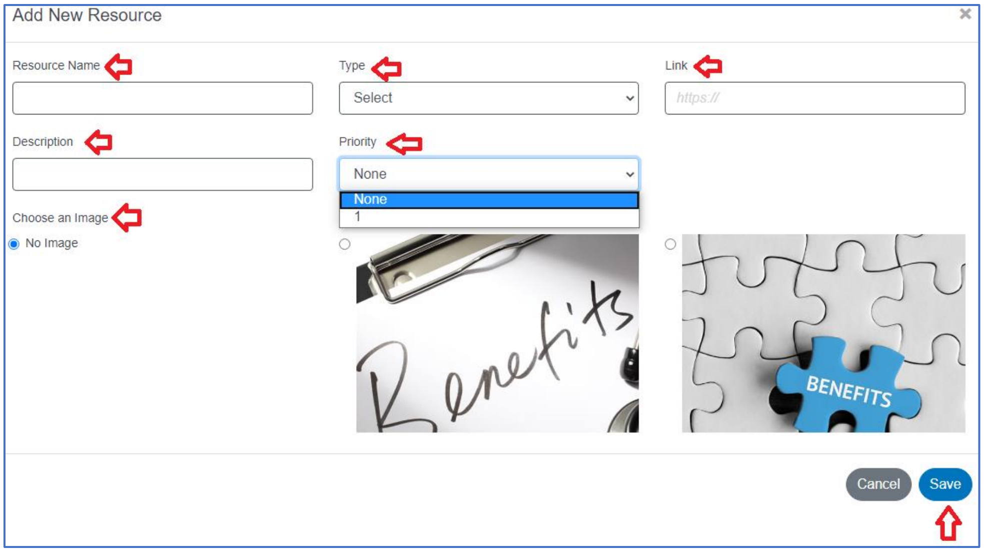
(g) **Resources** – resources are content to be displayed on the Open Enrollment Landing page in the form of document attachments, images (pre-defined listing), hyperlinks, and videos

<u>To Add A Resource</u>:

(i) Click on the Add A Resource icon:



(ii) Enter the Resource Name, Type from the drop down menu, Link address/URL, Description, Priority, click on the pre-defined listing of radio buttons for images, and click on the Save button. Priority is drop menu of numbers giving the ability to advisors to control the sequence or display if multiple Resources are added. (Note: a resource with a Priority value of 2 will be appear or display hierarchically below another Resource with a Priority value of 1).

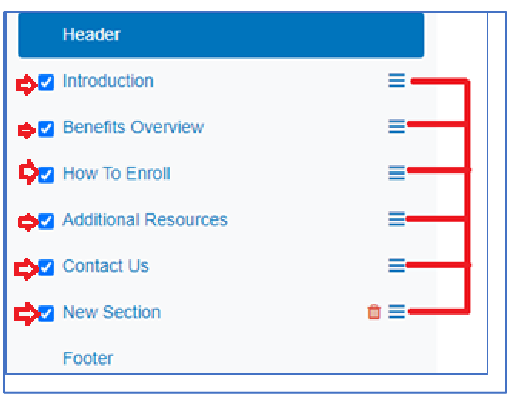


(h) **Choose A Layout** - advisors will have the ability to select, at this time, only from the pre-defined list of radio button options for a display layout structure. External display layout structures cannot be imported.

18) Changing the Sequence of How Sections Are Displayed on the Open Enrollment Landing Page

Advisors have the ability to change the sequence of how sections and their corresponding content are displayed on the Open Enrollment page:

(a) Left click on the three horizontal bars icon next to a given section heading name from the left-hand navigation
(b) Drag and drop that section heading name in the order or sequence (from top to bottom) as you desire



Note: Advisors can determine which content section to display on the Open Enrollment Landing Page by either checking or unchecking the checkbox to the left of each content section heading

Leveraging Templates

In order to create efficiencies for creating additional Open Enrollment Landing Pages with a specific content format, advisors can create and save templates. For NFP offices on Salesforce, templates can be accessed and re-used within the same region (e.g. West, Central, Mid-Atlantic, Northeast, etc.). Sample client records for NFP offices on Salesforce have been created within NFP Connect for advisors to create demo or sample Open Enrollment Landing Pages and/or share templates within a given region:

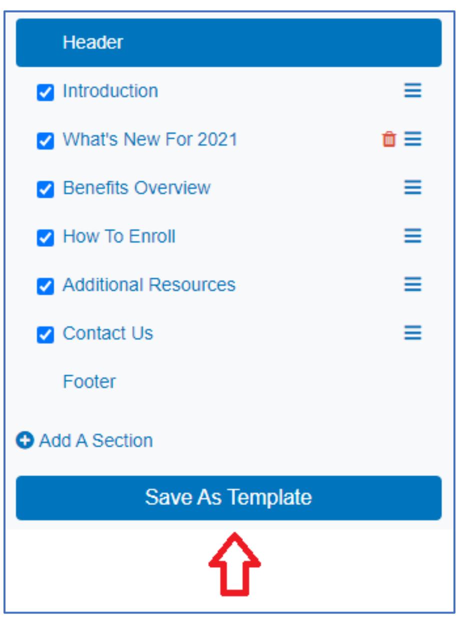
Central: https://techmanagementcenter.nfp.com/client/details/801189
Northeast:https://techmanagementcenter.nfp.com/client/details/801191
Mid-Atlantic: https://techmanagementcenter.nfp.com/client/details/801193
Southeast: https://techmanagementcenter.nfp.com/client/details/801194
West: https://techmanagementcenter.nfp.com/client/details/801197

For Benefits Partners firms or those NFP offices not on Salesforce, templates be accessed and re-used within the same office.

Create & Save a Template:

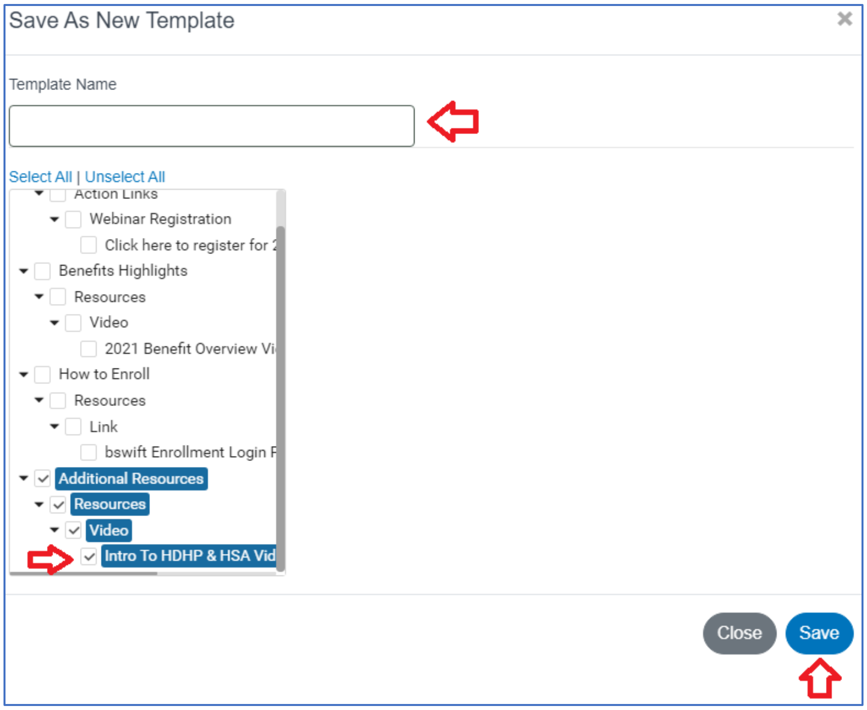
(a) Ensure all content has been entered for the initial Open Enrollment Landing Page (section names, descriptions, including section heading sequencing, etc.)

(b) Click on the Save As Template button:



(c) Enter a Template Name and select which resource(s) (e.g. documents, links, images, etc.) that you like to be copied and saved along with the template in the Save As New Template screen and then select the Save button:

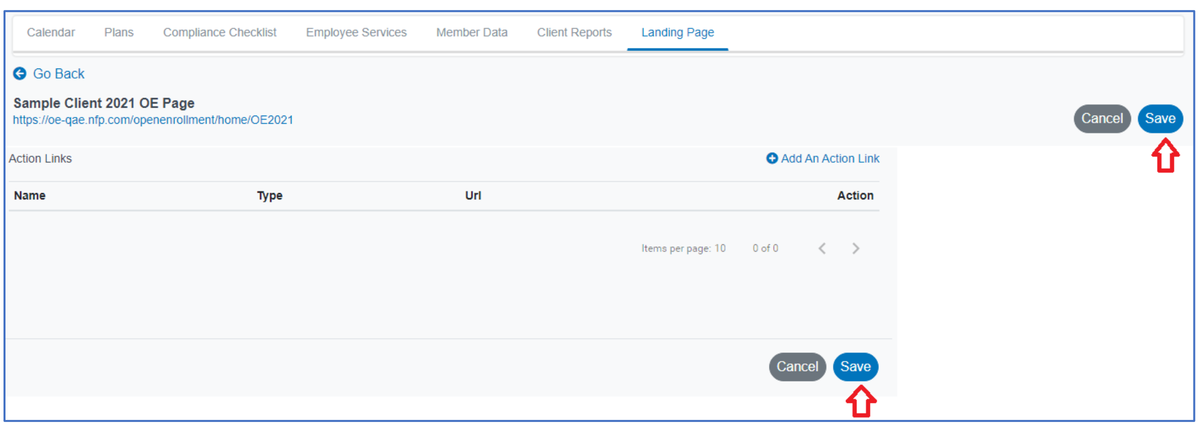
Open Enrollment Landing Page Setup Instructions



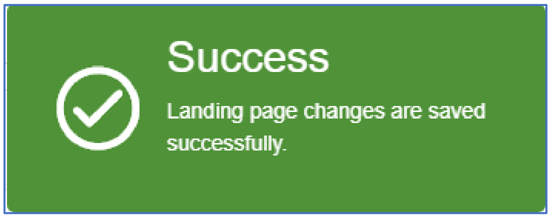
(d) Once a template is saved, it can be re-used to the create a new Open Enrollment Landing Page (refer back to step 8 where the option is given to the user to import a previously created template)

19) Saving the Open Enrollment Landing Page

(a) Click on the Open Enrollment Landing Page Save button found either in the upper right or lower right screen within the Landing Page tab:



(b) After saving the Open Enrollment Landing Page, you'll receive a notification:



Note: there is no "sandbox" or test environment where Open Enrollment Landing Pages can be viewed or tested. Once the Open Enrollment Landing Page is saved, the client's Open Enrollment Landing Page website/URL is "live." Anyone with access to the Open Enrollment Landing Page website/URL can view the content and any subsequent changes or updates made to the Open Enrollment Landing Page.

20) Locating Open Enrollment Landing Page Website Address/URL

Once step 8 is completed, a unique Open Enrollment Landing Page website address/URL is automated created. The Open Enrollment Landing Page website address/URL is not customizable at this time. All Open Enrollment Landing Page websites/URLs will contain the Employee/Business Code created in step 8.

The Open Enrollment Landing Page website address/URL is found just above the left-hand navigation of the various content sections in the Landing Page tab: