



**TEAM** Software  
by WORKWAVE®

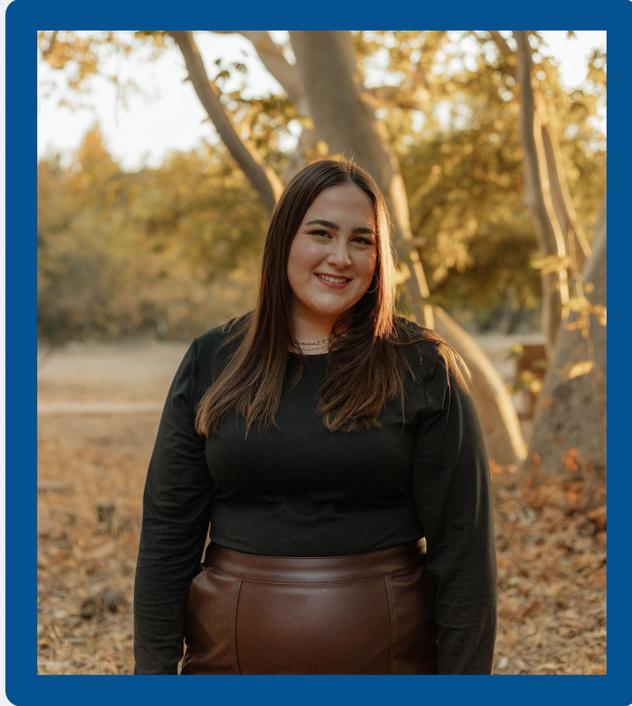
# Effortless Open Enrollment: A Guide to Benefits Maintenance and Automation

Wednesday, February 4, 2026

8:45AM - 10:15AM

# Meet the TEAM

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**Jordan Craig**

Implementation Specialist, TEAM Software



**Tracy Marsh**

Sr. Implementation Specialist, TEAM Software

# Agenda

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- **Insurance Benefits Upkeep Process**
  - How to Handle New Hires, Rehires and Exceptions in the Package Validation Screen
  - Running the Initial Eligibility Testing Wizard
  - Termination Engine
  - Deduction Sync
- **Insurance Benefits Open Enrollment Processing**
  - Creating your New Benefit Year Packages
  - Running the Eligibility Testing Wizard to determine Benefit Eligibility
  - Assigning New Benefit Year Packages

# RESOURCES

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## Upkeep Cheat Sheet

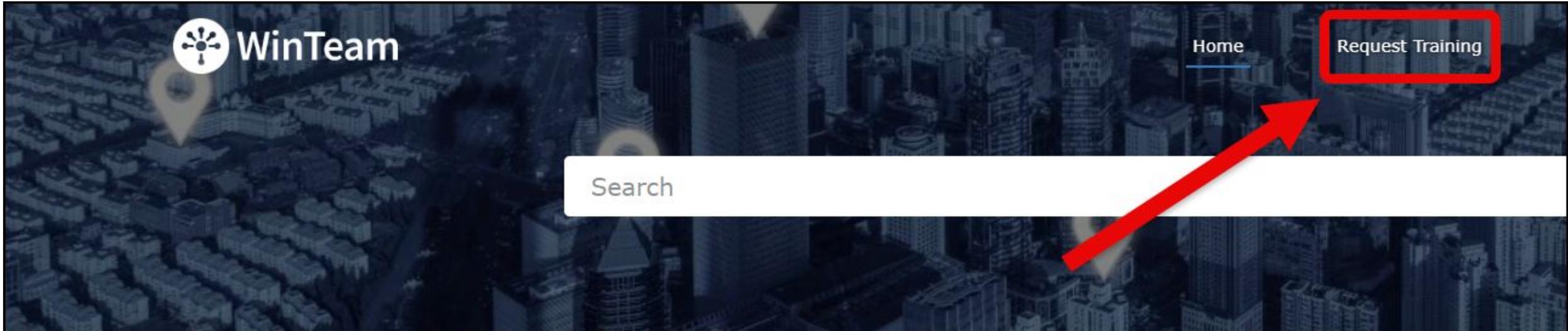


## Open Enrollment Checklist



# Questions?

# Schedule 1:1 Training with us



**Welcome to the WinTeam Community Site!**

New to Community? Check out the overview video.



# Session Feedback

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