

Reduce Administrative Tasks with Eligibility Management Services



Our goal is to help you to minimize the challenges that may come with administering your plan, while also helping you to prepare your employees to navigate their retirement journey. One way that we can ensure this is through Eligibility Management Services (EMS). This service will alert you when your employees are eligible to participate based on the service requirements within your plan.

How EMS Works:



Calculate Entry Dates

- After census and payroll files are received, EMS projects entry dates for employees



Notify and Enroll

- Reporting Level
 - You are notified when employees are eligible
 - You are responsible for providing participants with enrollment materials



- Full Service Level

- You are notified when employees are eligible
- Participants receive an email when they are eligible to participate
- You are notified when participant eligibility notifications are undeliverable
- Participants are provided with electronic plan documents, notices, and disclosures through Online Enrollment

Getting Set Up with EMS is Easy

In order for EMS to correctly calculate and report projected eligibility and entry dates, you must submit comprehensive and accurate census and payroll files with each scheduled payroll. Select which level of EMS (Reporting or Full Service) best meets your needs.



To learn more about how EMS can support your administrative needs, or to get assistance in setting up EMS, contact your Nationwide Retirement Specialist.