

Ease to Employee Navigator Migration Checklist

Simple checklist for confirming readiness, completing migration, and validating the post-migration setup.

Reminder: Complete migration outside Open Enrollment when possible and confirm access to both systems before starting.

1 Before You Start

- ☐ Confirm the Employee Navigator brokerage subscription is active.
- ☐ Make sure you can log in to both Ease and Employee Navigator.
- ☐ Confirm the group is not in Open Enrollment.
Best practice: migrate at least 2 months before or after Open Enrollment

2 Check Migration Readiness in Ease

- ☐ Open the Employee Navigator Migration Dashboard.
- ☐ Search for the group.
- ☐ Refresh the readiness status.
- ☐ Open and review the readiness report.

3 Fix Any Errors

- ☐ Correct any company or plan errors.
- ☐ Correct any employee errors.
- ☐ Refresh the dashboard and confirm all errors are cleared.

4 Review Warnings

- ☐ Review any non-blocking warnings.
- ☐ Confirm the group shows Ready for Migration.

Ease to Employee Navigator Migration Checklist

(Continued)

5 Migrate the Group

- ☐ Select the company and click Migrate.
- ☐ Confirm the destination brokerage.
- ☐ Log in to Employee Navigator and confirm the migration.

6 Review After Migration

- ☐ Review the migration report.
- ☐ Verify company details, employees, plans, and documents transferred correctly.
- ☐ Reconnect or reset integrations in Employee Navigator as needed.

7 Final Verification

- ☐ Confirm integrations have been disabled in Ease.
- ☐ Verify login access to both systems.
- ☐ Going forward, make all updates in Employee Navigator.

Final handoff note: Once the migration has been reviewed and confirmed, Employee Navigator becomes the system of record for future updates.

Check out our [Ease to Employee Navigator Page](#) for the latest updates and resources.

Need Additional Help?

Contact your Dickerson Sales Rep.