

A GUIDE FOR BENEFITS SOFTWARE, BEN-ADMIN PLATFORMS, AND HR SOLUTIONS

# Installing a new group is easier than ever with Noyo

**Noyo digitizes group installation and ensures that information is accurately placed in the carrier's system**

- ✓ Leave messy email chains behind and submit new group applications directly to carriers
- ✓ Ensure the accuracy of group data with Noyo's validation checks
- ✓ Monitor the status of each application
- ✓ Confirm when the carrier has installed the group correctly and all enrollments are processed

## About the group installation experience

Get a new level of transparency into the process of installing newly sold groups with carriers, activate extra data validation, and ensure a smoother enrollment period for your customers.

The Group Installation product is currently in beta and available for Beam Benefits; more carriers from the Noyo network will be available soon. For groups with coverage at other carriers, Noyo is not able to install groups over API.

### Step 1: Groups purchase coverage with a new carrier

Noyo's [Group Installation endpoints](#) should be used when a group is totally new to the carrier. If a group already exists in the carrier's system, you'll want to [connect a group](#) instead. Quoting and selling happen outside of the Noyo system.

### Step 2: Create and configure the group in Noyo's system

Give Noyo some basic information about the group via API and receive a Noyo ID. Use the group's ID to start adding information, such as locations, lines of coverage, and employees.

### Step 3: Create and submit a new group application

Create a new application for each carrier the group should be installed with and associate that application with the group. Add key information and upload any relevant documents that are required by the carrier. Submit the application and attached documents with a simple API call; Noyo checks the data against carrier-specific rules to ensure acceptance.

### Step 4: Noyo gets the group installed

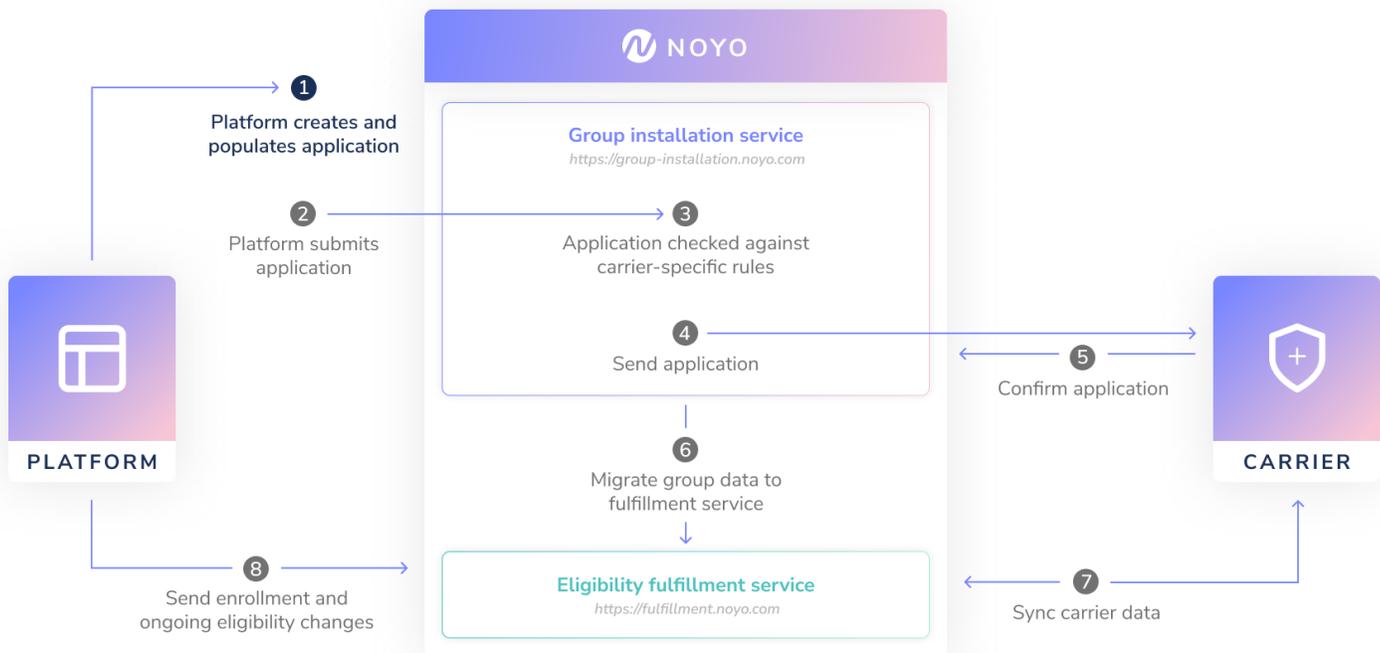
After the application has been submitted, Noyo transmits the structured data to the carrier. Then we check the carrier's system to determine whether the group has been successfully installed. The application may need further action from the platform in order to process, but if not, Noyo will confirm installation and begin processing the submitted enrollments.

### Step 5: The group is ready for maintenance requests

After the group is installed and Noyo has processed the initial enrollments, member requests for ongoing maintenance and changes can be sent at any time.

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# How does Group Installation work?



1. [Create the group](#) using `POST https://group-installation.noyo.com/api/v1/groups` which requires information including `name`, `sic_code`, and `federal_ein` in the request body. Store the `group_id` returned in the response.
2. [Create a blank application](#) using `POST https://group-installation.noyo.com/api/v1/groups/:group_id/applications`. (You'll need the `carrier_id` from Noyo's carrier spec.) Store the `application_id` and use it to populate the application with the following information about the group:
  - Bank accounts
  - Agent contact info
  - Plans
  - Dependents
  - Agents
  - Group coverages
  - Employees
  - Member elections
3. [Create additional documentation](#) using the `POST https://group-installation.noyo.com/api/v1/applications/:application_id/documents` endpoint. Once the document is created, you can [upload it](#) using `POST https://document-upload.noyo.com/api/v1/files/:file_upload_id`. Noyo will validate that the correct documentation has been added per carrier requirements.
4. After all necessary information has been associated with the group and their application, you can [submit the application](#) by calling. If any part of the application fails validation, Noyo will return a 422 error and the application's status will change to `action_required` ([see a list of all possible statuses in the API docs](#)).
5. A valid application submission will prompt Noyo to transmit the application information to the carrier. Noyo will begin periodically checking the carrier's system to detect when the group has been installed. You can get the status of the application at any time with a `GET` request for a specific application or

for all of a group's applications. Noyo returns a status of `installed_at_carrier` when the data in the carrier's system matches what is expected.

6. The group is moved to the fulfillment service for the Noyo Member Enrollment product. Noyo syncs with the carrier's system and determines whether the group needs [account structure mapping](#).
7. Noyo sends all the member elections as open enrollment requests. When these are completed, the application status shifts to `ready_for_requests` and ongoing maintenance changes can be sent with member requests as usual.

## Sample workflow for Group Installation tasks

