



TaxSaver/Navia COBRA and Direct Bill Q & A Webinar

The presentation will begin shortly...

All participants are muted during the presentation. You can submit questions at any time using the Questions box in your GoToWebinar panel. We will address as many questions as time allows during the session. This session will be recorded and sent out after the presentation.



TaxSaver/Navia COBRA and Direct Bill Q&A Webinar

Hosts: Shelby Davis and Tegan Shepard

Agenda

- Introduction
- Review TaxSaver/Navia COBRA & Direct Bill Transition website
 - Enhanced Portal Features
 - Key Differences
 - Transition Instructions and Timeline
 - Important Documents
 - Training Webinars
 - FAQs
- Action Items
- Questions

Introduction

In 2022, TaxSaver Plan, Inc. announced its partnership with Navia Benefit Solutions, a company with over 30 years of experience in providing benefits administration to nationwide employers. We are thrilled about this partnership as it allows us to continue delivering high-touch service while leveraging the additional features and resources available through Navia's enhanced platform. Together, we offer a robust service infrastructure designed to better meet the needs of our employers and participants.

In the upcoming months, we will be transitioning and upgrading your COBRA/Direct Bill plans to the enhanced Navia platform. Dedicated representatives from both TaxSaver and Navia will handle all key activities associated with the migration to minimize any impact on you and your organization.

Effective September 2, 2025, you may begin reporting new hires and events directly through the Navia Employer Portal. On September 22, 2025, all pending and actively enrolled COBRA/Direct Bill participants will be migrated to Navia's platform. This transition will provide you with a better user experience and ease of administration.

If you offer CDH plans (FSA, HSA, HRA, Commuter, etc.), those plans will migrate to Navia's platform at your next renewal.

TaxSaver/Navia COBRA and Direct Bill Transition Site

Resource Site: <https://www.naviabenefits.com/taxsaver-cobra/>
Password: taxsavertransition

- Welcome Overview
- New Enhancements
- Key Differences
- Transition Instructions and Timeline
- Important Documents
- Training Webinars
- FAQs

The site will be regularly updated with new information and tools as we move through the transition.

Action Items

TaxSaver and Navia have dedicated resources to ensure a smooth transition and to minimize the impact on you and participants. Over the coming months, there are a handful of important actions to complete to ease your transition to the Navia platform. You will receive email communications throughout the process to remind you what needs to be done next.

- Sign and return your new Navia Administrative Services Agreement. The Administrative Services Agreement will be sent via Conga the week of July 7th.
- Complete the Direct Debit and Credit Authorization Form. This form authorizes Navia to debit your bank account for monthly administrative fees (invoices). NOTE: Employers offering COBRA and/or Direct Bill only will receive the form during the week of July 7th. If your company offers CDH plans, the form will be sent separately at the time of your CDH migration.
- Starting September 2, 2025, enter new hires and qualifying events into Navia's enhanced portal.
- Attend the Employer Training Webinar on September 2, 2025.
- Register on Navia's Employer Portal on September 2, 2025. Online registration instructions will be provided via email on September 2nd. If you have existing benefits on the Navia platform, you will log in with your existing credentials.

Questions?

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