

How to modify an Employee Enrollment after the Open Enrollment Period

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To help an employee get enrolled, change plans or add dependents **after** their Open Enrollment period, a Broker or Employer can click the *Modify* button on the Employer Roster for that employee.



Important - Once the Modify button is clicked it will **not** appear again. The employee will only be able to enroll through the current period (Edit/Retro). For example - If clicked in the Edit Period (the time frame after the Open Enrollment period closes and the effective date), the employee will have until the end of their Edit Period to enroll. Their ability to enroll will disappear once the Edit Period closes. If clicked in the Retro Period (beginning on the effective date, lasting for 30 days), the employee will have until the end of the Retro Period to enroll.

The functionality of the Modify button changes pending which period the employee is currently in.

Example: An employee has an Effective Date of 12/1/16. Their Open Enrollment Period will be 10/1/16-10/31/16. The Edit Period is 11/1/16-11/30/16. Their Retro Period is 12/1/16-12/31/16.

Employee Open Enrollment Period: *(Per Example – Open Enrollment Period is 10/1/16-10/31/16)*

The Modify button is not visible in the Open Enrollment Period. The Employee is able to edit their own enrollment from their Employee Portal.

Employee Edit Period: *(Per Example – Edit Period is 11/1/16-11/30/16)*

- The Modify Button will appear for all Brokers and Employers on the 1st (first) day of the employee's Edit Period (11/1/16).
- If an employee did not enroll in the Open Enrollment Period for any reason, the CSR or Employer can click the Modify button on the Employer Roster to allow the Employee to enroll. They will have until the end of the current period to enroll for their original effective date (12/1/16).
- If an enrolled employee needs to change their plan or make any edits to their enrollment during the Edit Period, they can do so once the Broker or Employer clicks the Modify button on the Employer Roster. They will have until the end of the Edit Period to change their plan, add a dependent, add Dental (if available), and make any other edits.

Employee Retro Period: *(Per Example – Retro Period is 12/1/16-12/31/16)*

- The Modify button will appear for unenrolled and enrolled employees in the Retro Period for Brokers and Employers on the Employer Roster.
- Once the Modify button is clicked for an employee, that employee will have through the end of the Retro Period to enroll for their original effective date (12/1/16).

- An enrolled employee will NOT have the ability to change their plan if the button is clicked in the Retro Period. They can only edit their existing enrollment by adding dependents and changing coverage tiers.