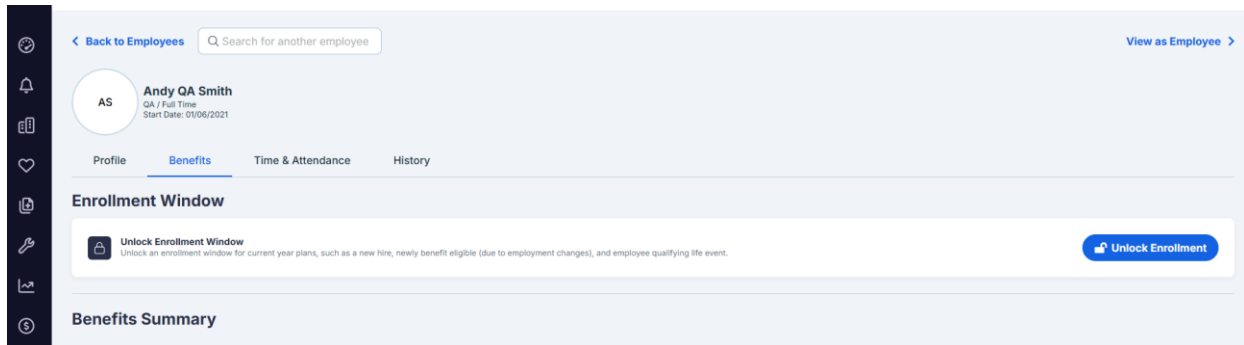


Unlocking an Enrollment Window

To allow an individual employee to make new elections or qualified changes to their benefits coverage, you will first need to Unlock an Enrollment Window. To unlock all employees for Open Enrollment, please refer to the Open Enrollment Guides.

1. From the **Employees** tab at the top of the page, select the employee you wish to unlock.
2. Upon selecting an employee, you'll be brought to their profile page. From here, select their **Benefits** tab from below their name.
3. From the **Benefits** tab, you will see any currently unlocked enrollment windows, a summary of benefit elections if they have previously enrolled, and a button to Unlock an enrollment window.



To open the system for an employee to enroll or make election changes, click the **Unlock Enrollment** button and select the **Enrollment Type**.

Unlock Enrollment Window



Enrollment Details

Enrollment Type *

Newly Eligible



Profile Change Effective Date *

 MM/DD/YYYY



Additional details

Available Benefits

Select the benefits that should be included in this enrollment window.

List will populate once required fields in Enrollment Details section are complete...

Notification Options

Send Email Notification to Employee



Yes



No

Partner Options

Push to Payroll



Yes



No

Note: If employees do not log in and/or complete their elections within 30 days, the system will automatically close their enrollment window and they will not be enrolled in any coverage. Additionally, if enrollment changes are not set to pend for admin approval, employee elections will pend for 3 days after completing their enrollment to allow for any changes, then the system will automatically approve all elections and close the enrollment window.

Cancel

Unlock Enrollment

- **New Hire** - The system will automatically determine the employee's benefits effective date based on their date of hire and waiting period rules configured during plan set up.
- **Newly Eligible** - Enter the date of change and the system will automatically determine benefits effective date based on waiting period rules configured during plan set up.
- **Qualified Life Event** - Select a "Qualified Life Event Reason" from the drop-down menu and enter the Life Event date. The system will automatically determine the benefits effective date based on waiting period rules configured during plan set up.