

## Introduction

This document provides information on how to use the enrollment management tool found in Employee Admin Tools > Employee Administration > Enrollment Management.

Customers utilizing the online enrollment tool for their employees to elect benefits will use this to manage and approve/reject employee elections. Employee data can be found here for those that have started but not finished, those that have submitted their benefit elections, those needing EOI, and much more.

## Enrollment Management

### Eligible to Enroll Tab:

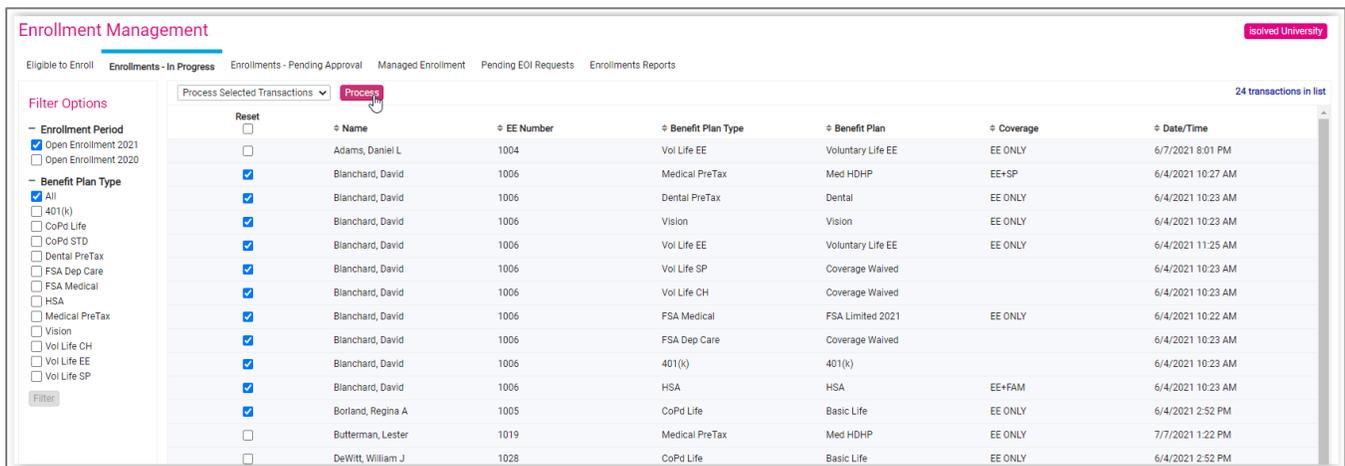
- **Filter Options:** Allows you to select the **Legal Company**, **Enrollment Period** and **Enrollment Status** to filter the results.
  - Make your selections and select 'Filter' to see those that are eligible for the selected enrollment, their status for that enrollment, the days they have left and the date/time they completed the enrollment, if applicable.
  - The top-right includes a count of transactions (or employees) in the list.
  - This is informational only, there is no functionality to this page.

The screenshot shows the 'Enrollment Management' interface. At the top, there are tabs for 'Eligible to Enroll', 'Enrollments - In Progress', 'Enrollments - Pending Approval', 'Managed Enrollment', 'Pending EOI Requests', and 'Enrollments Reports'. The 'Eligible to Enroll' tab is active. On the left, there are 'Filter Options' including 'Legal Company' (University Management Company), 'Enrollment Period' (Open Enrollment 2023), and 'Enrollment Status' (All). A 'Filter' button is at the bottom of the filter options. The main area displays a table with 21 transactions. The table has columns for Company Name, EE Number, Name, Life Event Date, Life Event Type, Enrollment Status, Days Left to Enroll, and Completed Date/Time. All enrollment statuses are 'Not Started' and 'Days Left to Enroll' is 10 for all entries.

Company Name	EE Number	Name	Life Event Date	Life Event Type	Enrollment Status	Days Left to Enroll	Completed Date/Time
University Management Company	1004	Adams, Daniel L			Not Started	10	
University Management Company	1006	Beckman, David			Not Started	10	
University Management Company	1005	Borland, Regina A			Not Started	10	
University Management Company	1017	Bryant, Maxine			Not Started	10	
University Management Company	1025	Corsen, Kal			Not Started	10	
University Management Company	1014	Gurney, Nicole			Not Started	10	
University Management Company	1021	Henderson, Marie C			Not Started	10	
University Management Company	1008	Jackson, Mitchell (Mitch)			Not Started	10	
University Management Company	1026	Johnson, Alex (Al)			Not Started	10	
University Management Company	1019	Jones - Karms, Lena D			Not Started	10	
University Management Company	1000	Malarkey, Mason J			Not Started	10	
University Management Company	1002	Malarkey, Michael J (Mike)			Not Started	10	
University Management Company	1003	Mcdonald, Sandy A			Not Started	10	
University Management Company	1011	McMichaelis, Anne			Not Started	10	
University Management Company	1007	Michaelis, Anne P			Not Started	10	
University Management Company	1013	Morgan, Jason P			Not Started	10	
University Management Company	1027	Morgan, Jason T			Not Started	10	
University Management Company	1024	Overman, Victoria			Not Started	10	
University Management Company	1022	Rose, Karla D			Not Started	10	
University Management Company	1023	Smith, Kelly			Not Started	10	
University Management Company	1010	Test, Lindsey			Not Started	10	

Enrollments – In Progress Tab:

- **Filter Options:** Allows you to select the **Enrollment Period** and **Benefit Plan type** to filter the results.
  - Make your selections and select 'Filter' to see those that have started but have not yet submitted their enrollment.
  - The top-right includes a count of transactions (or employees) in the list.
  - **Reset** allows you to reset the enrollment status for all or you can select individually.
    - **Reset** will reset their enrollment status to remove all options selected and have the enrollment appear clean/new, as if they had not started it previously.
    - This is often used for the employee accounts that may have been used for testing or previewing the enrollment for setup accuracy, the reset will wipe away all selections made during the preview
  - In the drop-down, select if you want to Process All Transactions or only to Process Selected Transactions, then select **Process** to refresh the enrollment.



Enrollments – Pending Approval Tab:

- **Filter Options:** Allows you to select the **Enrollment Period** and **Benefit Plan type** to filter the results.
  - Make your selections and select 'Filter' to see those that have submitted their enrollment and are awaiting approval or rejection.
  - The top-right includes a count of transactions (or employees) in the list.
  - **Approve/Reject** at the top allows you to select all or you may select approve/reject individually.
  - Click on a row to see more details about that coverage
  - In the drop-down, select to Approve all Transactions, Reject All Transactions or Process Selected Transactions, then select **Process**.

The screenshot shows the 'Enrollment Management' interface for 'Isolved University'. It features a navigation bar with tabs: 'Eligible to Enroll', 'Enrollments - In Progress', 'Enrollments - Pending Approval' (selected), 'Managed Enrollment', 'Pending EOI Requests', and 'Enrollments Reports'. A 'Filter Options' sidebar on the left allows filtering by 'Enrollment Period' (Life Event Enrollment 2021, Open Enrollment 2021, Open Enrollment 2020) and 'Benefit Plan Type' (All, Dental PreTax, FSA Dep Care, FSA Medical, HSA, Medical PreTax, Vol Life CH, Vol Life EE, Vol Life SP). The main area displays a table of transactions for 'Jackson, Mitchell J (John)' with columns: Name, EE Number, Benefit Plan Type, Benefit Plan, Coverage, and Date/Time. The table has 8 rows, with the first 7 rows having an 'Approve' checkbox checked and a 'Reject' checkbox unchecked. The 8th row has 'Approve' unchecked and 'Reject' checked. A 'Process' button is located at the top right of the table area, and a count of '8 transactions in list' is shown.

Approve	Reject	Name	EE Number	Benefit Plan Type	Benefit Plan	Coverage	Date/Time
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jackson, Mitchell J (John)	1008	Medical PreTax	Med HDHP	EE ONLY	3/24/2021 3:32 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jackson, Mitchell J (John)	1008	Dental PreTax	Dental	EE+CH(REN)	3/24/2021 3:34 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jackson, Mitchell J (John)	1008	Vol Life EE	Coverage Waived		3/24/2021 3:34 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jackson, Mitchell J (John)	1008	Vol Life SP	Coverage Waived		3/24/2021 3:35 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jackson, Mitchell J (John)	1008	Vol Life CH	Voluntary Life CH	CH ONLY	3/24/2021 3:35 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jackson, Mitchell J (John)	1008	FSA Medical	FSA Medical 2021	EE ONLY	3/24/2021 3:35 PM
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jackson, Mitchell J (John)	1008	FSA Dep Care	Coverage Waived		3/24/2021 3:35 PM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Jackson, Mitchell J (John)	1008	HSA	Coverage Waived		3/24/2021 3:35 PM

### Managed Enrollment Tab:

- This tab will only populate if you are configured to have a Managed Enrollment and all elections for this enrollment have been approved or rejected.
- The Managed Enrollment option allows administrators to make enrollment selections for those that do not complete their own enrollment, this tab will show those that have not completed the enrollment & will have plan selections based on the rules configured in the Managed Enrollment section of the Enrollment setup.
- **Filter Options:** Allows you to select the following:
  - Enrollment Period
  - Benefit Plan Type
  - Benefit Plan
  - Coverage Code
  - If you want: Do not display current waivers of coverage.
  - If you want: Only display records with missing data.
  - Make your selections and select 'Filter' to see those that have not submitted their enrollment and will have plan selections based on the Managed Enrollment configuration on the Enrollment setup.
  - The top-right includes a count of transactions (or employees) in the list.
  - **Approve/Reject** at the top allows you to select all or you may select approve/reject individually.
  - Click on a row to see more details about that coverage.
  - In the drop-down, select to Process All Transactions or Process Selected Transactions, then select **Process**.
  - If needed, make different selections in the dropdown for the New Benefit Plan & New Coverage code if wanting something other than what the system would assign based on the configuration.

**Enrollment Management** isolved University

Eligible to Enroll | Enrollments - In Progress | Enrollments - Pending Approval | **Managed Enrollment** | Pending EOI Requests | Enrollments Reports

11 transactions in list

<input type="checkbox"/>	Name	EE Number	Current Benefit Plan	Current Coverage	Start Date	Stop Date	New Benefit Plan	New Coverage	New Start Date
<input type="checkbox"/>	Murphy, Sandra A	1003	HDHP Gold	EE+FAM	01/01/2021	05/31/2021	HDHP Gold	EE+FAM	06/01/2021
<input type="checkbox"/>	Potter, Regina A	1005	HDHP Gold	EE+CH	01/01/2021	05/31/2021	<i>Employee is not eligible for any benefit plans as of Plan Year Benefit Start Date</i>		
<input type="checkbox"/>	Sullivan, David	1006	HDHP Gold	EE+FAM	01/01/2021	05/31/2021	HDHP Gold	EE+FAM	06/01/2021
<input type="checkbox"/>	Weaver, Anne P (Poly)	1007	PPO Silver	EE	01/01/2021	05/31/2021	PPO Silver	EE	06/01/2021
<input type="checkbox"/>	Shaw, Mitchell	1008	PPO Silver	EE+FAM	01/01/2021	05/31/2021	PPO Silver	EE+FAM	06/01/2021
<input type="checkbox"/>	Davidson, Lydia A	1010	PPO Silver	EE+SP	01/01/2021	05/31/2021	PPO Silver	EE+SP	06/01/2021
<input type="checkbox"/>	Stone, Noah	1011	HDHP Gold	EE+SP	01/01/2021	05/31/2021	HDHP Gold	EE+SP	06/01/2021
<input type="checkbox"/>	Zhang, Eric F	1012	HDHP Gold	EE+CH	05/01/2021	05/31/2021	HDHP Gold	EE+CH	06/01/2021
<input type="checkbox"/>	Patel, Vihaan Y (V.J)	1013	HDHP Gold	EE	01/01/2021	05/31/2021	HDHP Gold	EE	06/01/2021
<input type="checkbox"/>	Garcia, Jesus G	1014	PPO Silver	EE+CH	01/01/2021	05/31/2021	PPO Silver	EE+CH	06/01/2021
<input type="checkbox"/>	Benjamin, Richard L	1015	HDHP Gold	EE	01/01/2021	05/31/2021	HDHP Gold	EE	06/01/2021

**Pending EOI Requests Tab:**

- Filter Options:** Allows you to select the Enrollment Period, Benefit Plan Type & Benefit Plan Name to filter the results.
    - Make your selections and select 'Filter' to see those that have submitted their enrollment but have plans that are pending due to the configuration of the benefit plan with respect to guarantee issue amounts and may require Evidence of Insurability (EOI).
    - The top-right includes a count of transactions (or employees) in the list.
    - If needed, make different selections in the drop-down for the Requested Amount, Status, & Approved/Rejected Date.
- Note:** Use this tab to approve or reject the election based on completed EOI.
- In the drop-down, select to Process All Transactions or Process Selected Transactions, then select **Process**.

**Enrollment Management** isolved University

Eligible to Enroll | Enrollments - In Progress | Enrollments - Pending Approval | **Pending EOI Requests** | Enrollments Reports

1 transaction in list

<input checked="" type="checkbox"/>	Name	EE Number	Benefit Plan Type	Benefit Plan	Coverage	Start Date	Actual Amount	Requested Amount	Status	Approved/Rejected Date
<input checked="" type="checkbox"/>	Butterman, Lester	1019	Vol Life CH	Voluntary Life CH	CH ONLY	03/16/2021	0	10,000.00	Approved	7/13/2021

### Enrollment Reports Tab:

Select the Enrollment Period, Enrollment Report & Output Type to generate reports to assist you in managing the enrollment. Reports available:

- **Approval Status:** To view the status of the enrollments that are not due to a life event enrollment and the 'approver.'
- **Approval Status – Life Events:** To view the status of the enrollments that were processed due to a life event and the 'approver.'
- **Benefit Enrollment E-Signature Acknowledgements:** To view the enrollment status, # of days left to enroll and signature date/time for all eligible employees.
- **Election Summary by Employee:** To view a summary of all elections per employee.
- **Election Summary by Plan:** To view a summary of all elections per plan.
- **Enrollment Status:** To view the status of the enrollments that are not due to a life event.
- **Enrollment Status – Life Events:** To view the status of the enrollments that were processed due to a life event.
- **Managed Enrollment:** To view a list of employees that will have a managed enrollment based on the configuration of the benefit enrollment.

