📄 Changing Enrollment with Eligibility

Overview

When you need to change an employee's enrollment information, use Work with Enrollment with Eligibility to make the change.

When an employee wants to stop participating in a plan, you must end the employee's enrollment in the plan. During an open enrollment period, you might need to end an employee's enrollment in one plan and then enroll the employee in another plan.

🖊 You cannot end an employee's enrollment in a benefit plan with an ending date prior to the last day of the employee's last pay period for which history exists. If you attempt to use a date earlier than the last day of the last pay period, the system will default to the last day of the last pay period for which history exists.

🖊 When you end an employee's enrollment in one plan at the same time that you enroll the employee in another plan, the effective date of the DBA associated with the new plan is equal to the effective enrollment date for the new plan. The system will end the old plan on the day before the date entered in the Effective Date field.

🖊 When terminating an employee, you must end the employee's enrollment via Terminate/Overrides. When you end enrollment for a terminated employee, the system does not re-enroll the employee in required plans.

⚠ **Reminder: Changing the amount/rate will end the employee's plan with the old rate and re-start the plan with the new rate. This will also end any dependent/beneficiary enrollment that uses the same dates. You will need to re-attach the dependents/beneficiaries to the new plan (even though it is the same plan ID as the old rate.)**

⚠ *Anytime* **HR staff use Enrollment with Eligibility, the first day of the pay period in which the deduction starts must be entered in the Enrollment Effective Date field on the Employee Master.**

This work instruction shows how to change an employee's enrollment information for plans. Working with Enrollment with Eligibility includes the following tasks:

Change an amount or rate

Correct mistaken enrollment

Change enrollment due to a Status Change

End enrollment

This work instruction includes Additional Functions and Options.

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with

State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: http://www.das.state.ne.us/.

Navigation

Click Roles, HR_PR   .
(Citrix users – right click on the menu, choose View by Role, choose HR_PR.)

Human Resources and Payroll – Agencies > Benefits Administration > Enrollment with Eligibility

Steps

Change an Amount or Rate Using Eligibility

Start this instruction from the Enrollment with Eligibility – Work with Enrollment with Eligibility window.

1. Complete the following fields:

    •   Employee Identification

    •   Effective Date - enter the same date entered in the Enrollment Effective Date on the Employee Master.

🖉 To limit your search, type the Category of the Benefit Group in the QBE (query-by-example) line directly above the Category column in the grid to search.

🖉 To limit the records that appear to *elected plans* with end dates blank or greater than or equal to the effective date, click the **Display Elected Plans and Plan Options** option.

2. Click **Find**.

3. Choose the plan for which you need to change the amount or rate, click **Row**, **Change Amt or Rate**.

🔖 You can change the amount or rate only for plans with an enrollment (Enr Sts) of ACT or an enrollment status that starts with the letter A and that allows an amount or rate change.

4. On Change Amount or Rate, type the amount or rate that the employee pays in the Employee Payroll Ded DBA field.

5. If applicable, complete the following field:

   • Employer Paid Benefit DBA

6. Click **OK**, and continue with the change.

7. On Enrollment with Eligibility, review the new information:

   • Displays a triangle in the row header for the record with the change

   • Ending date of one day prior to the effective date for the record with the change

   • A new record with the new rate

8. To complete the change, click **Submit**.

   🔖 After you submit the change, the triangle disappears.

   🔖 If a plan was not selected in a category that requires an election (ex. Medical), the Retest Eligibility window appears. Read the directions and click **OK** to return to the Work with Enrollment with Eligibility screen.

🔖 You can only change one at a time. You will need to click **Submit** after each change.

🔖 TO VIEW YOUR CHANGE: Make sure the employees number is in the Employee Identification field, enter the effective date of the change and make sure "Display Elected Plans and Plan Options" box is checked. Click **Find**. Scroll down to the appropriate code and scroll to the right to view the Enrollment Date and Payroll Deduction Amount.

9. When finished making all changes, click **Close**.

Correct mistaken enrollment using eligibility

Start this instruction from the Work with Enrollment with Eligibility window.

1. Complete the following fields:

    *   Employee Identification

    *   Effective Date - enter the same date entered in the Enrollment Effective Date on the Employee Master.

2. Click **Find**.

    ✏️ To limit your search, type the Category of the Benefit Group in the QBE (query-by-example) line directly above the Category column in the grid to search.

    ✏️ To limit the records that appear to *elected plans* with end dates blank or greater than or equal to the effective date, click the **Display Elected Plans and Plan Options** option.

3. Choose the row containing the mistaken enrollment.

4. Click **Row**, **Mistaken Enrollment**.

    ✏️ On Enrollment with Eligibility, the system displays either a trash-can icon (no payroll history is associated with the record) or an X (payroll history is associated with the record) in the row header of the record that was a mistaken enrollment.

5. To accept the correction, click **Form**, **Submit**.

    ✏️ If a plan was not selected in a category that requires an election (ex. Medical), the Retest Eligibility window appears. Read the directions and click **OK** to return to the Work with Enrollment with Eligibility screen.

Change enrollment due to Status Change

Start this instruction from the Enrollment with Eligibility – Work with Enrollment with Eligibility window.

1. Complete the following fields:

    -   Employee Identification

    -   Effective Date - enter the same date entered in the Enrollment Effective Date on the Employee Master.

2. Click **Find**.

3. Choose each row on the grid that contains a benefit plan or plan option in which you need to end for the employee.

4. Click **Row**, **Stop - Ovrd Dt/Sts**. The Override Date and Status window appears.

5. Complete the following fields:

    •   Enrollment End Date

        📝 The plan will stop the day before the Effective date.

    •   Enrollment End Status - use visual assist it needed

6. Click **OK** to return to the Work with Enrollment with Eligibility window.

7. Choose the benefit plan or plan option in which you want to enroll the employee.

8. Click **Row, Elect**.

9. Click **Form**, **Submit**.

    📝 If a plan was not selected in a category that requires an election (ex. Medical), the Retest Eligibility window appears. Read the directions and click **OK** to return to the Work with Enrollment with Eligibility screen. Make any additional elections and click Row, Elect and Form, Submit.


10. Click **OK**.

End enrollment using eligibility

Start this instruction from the Enrollment with Eligibility – Work with Enrollment with Eligibility window.
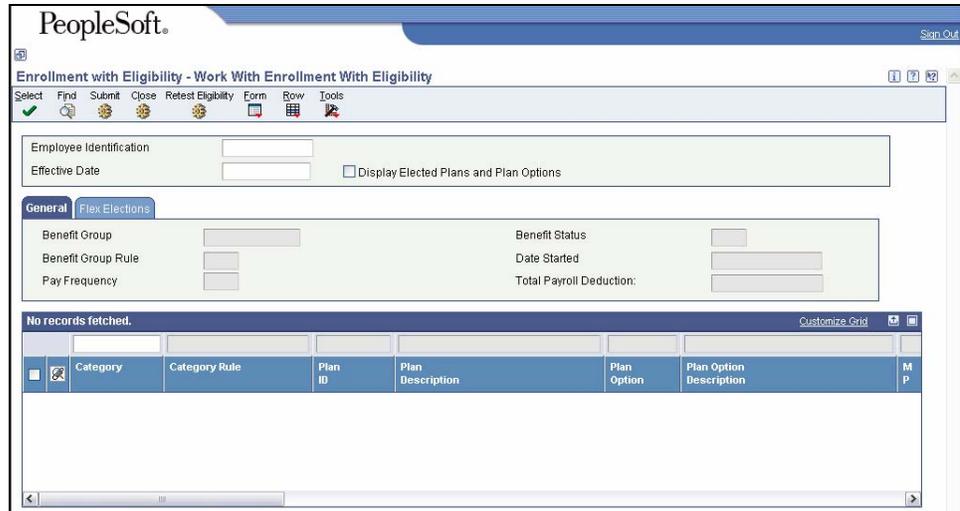
1. Complete the following field:

    - Employee Identification

    - Effective Date - enter the same date entered in the Enrollment Effective Date on the Employee Master.

2. Click **Find**.

✎ To limit your search, type the Category of the Benefit Group in the QBE (query-by-example) line directly above the Category column in the grid to search.

✎ To limit the records that appear to *elected plans* with end dates blank or greater than or equal to the effective date, click the **Display Elected Plans and Plan Options** option.
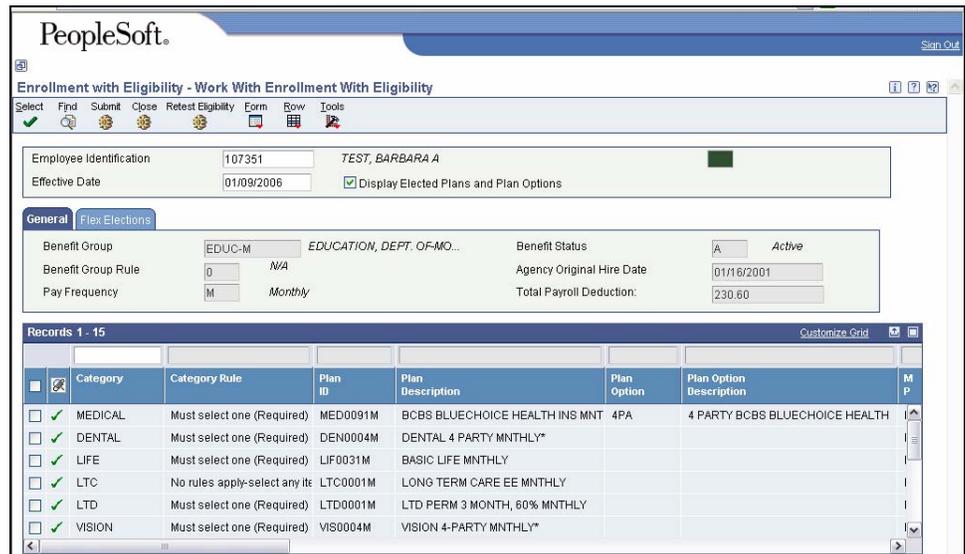
3. To end enrollment in a plan, choose the plan; click **Row**, **Stop – Ovrd Dt/Sts**. The Enrollment With Eligibility – Stop – Override Date and Status window appears.

4. On the Enrollment With Eligibility – Stop – Override Date and Status window, complete the following fields:

   - Enrollment End Date

   - Enrollment End Status

5. Click **OK**. The Enrollment with Eligibility - Work with Enrollment with Eligibility window appears.

6. On Enrollment with Eligibility, the system displays a circle with a line through it in the row header of the record for which you ended enrollment.

7. To cancel the change, double-click the row header for the plan.

8. To complete the change, click **Form**, **Submit**. The Enrollment with Eligibility - Work with Enrollment with Eligibility window appears.

   🖊 If a plan was not selected in a category that requires an election (ex. Medical), the Retest Eligibility window appears. Read the directions and click **OK** to return to the Work with Enrollment with Eligibility screen.

🖉 After you submit the change, the circle with a line through it disappears.

9.   Click **Close**.