

**Life Event during Open Enrollment Overview**

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take when adding a Life Event during Open Enrollment (OE). These actions will ensure that the life event changes are reflected in the OE elections and are transmitted to the vendors.

**Table of Contents**

Entering a Life Event during Open Enrollment (OE) .....2

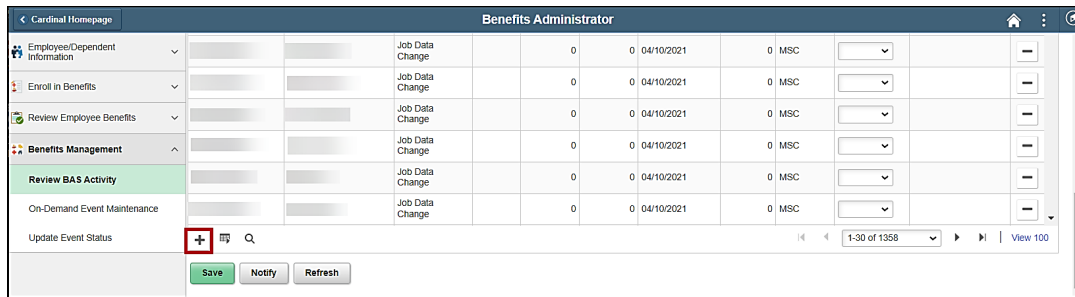
**BN361 Open Enrollment Life Event**
**Entering a Life Event during Open Enrollment (OE)**

Prior to entering a Life Event you must review the employee's OE selections and document any changes made during OE for both Health and FSA (Medical and Dependent Care).

1. Navigate to the **Review BAS Activity** page using the following path:

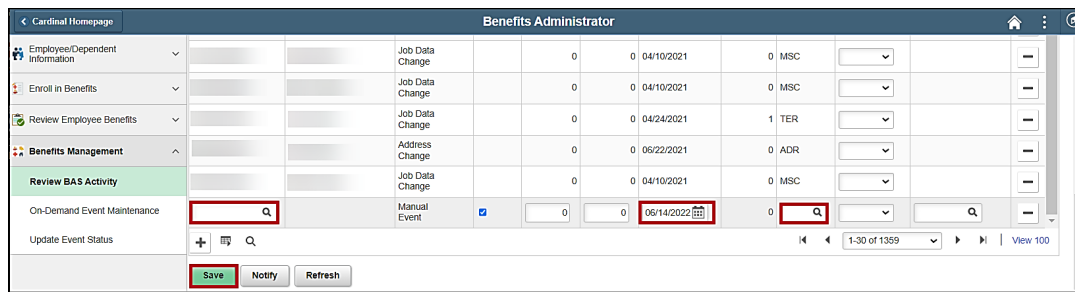
**Benefit Administrator Tile > Benefits Management > Review BAS Activity**

The **Review BAS Activity** page displays.



Activity	Job Data Change	MSC	Date
Employee/Dependent Information	Job Data Change	0	04/10/2021
Enroll in Benefits	Job Data Change	0	04/10/2021
Review Employee Benefits	Job Data Change	0	04/10/2021
Benefits Management	Job Data Change	0	04/10/2021
Review BAS Activity	Job Data Change	0	04/10/2021
On-Demand Event Maintenance	Job Data Change	0	04/10/2021

2. Click the **Add a Row (+)** icon at the bottom of the page.



Activity	Job Data Change	MSC	Date
Employee/Dependent Information	Job Data Change	0	04/10/2021
Enroll in Benefits	Job Data Change	0	04/10/2021
Review Employee Benefits	Job Data Change	0	04/24/2021
Benefits Management	Address Change	0	06/22/2021
Review BAS Activity	Job Data Change	0	04/10/2021
On-Demand Event Maintenance	Manual Event	0	06/14/2022

3. Enter the **Empl ID**, **Event Date**, and **BAS Action** on the **Review BAS Activity** page.

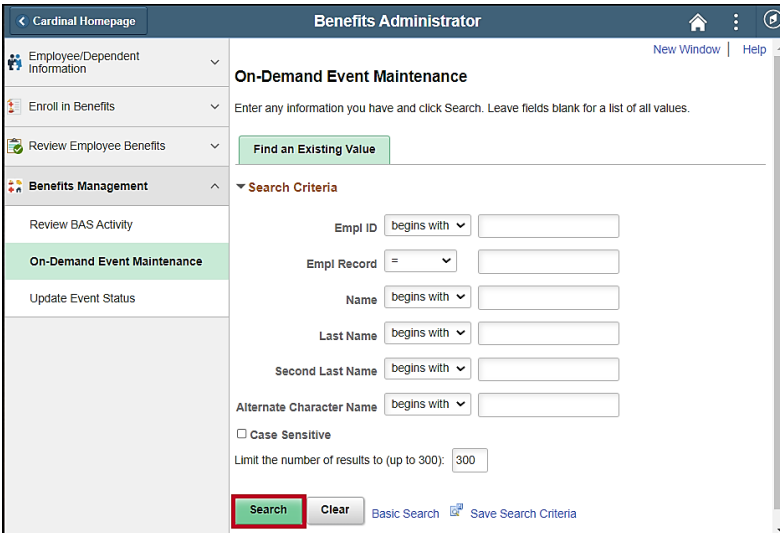
4. Click the **Save** button.

5. Navigate to the **On-Demand Maintenance** page using the following path:

**Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance**

**BN361 Open Enrollment Life Event**

The **On-Demand Event Maintenance** search page displays.



The screenshot shows the 'On-Demand Event Maintenance' search page. The search criteria section includes the following fields:

- Empl ID: begins with [ ]
- Empl Record: = [ ]
- Name: begins with [ ]
- Last Name: begins with [ ]
- Second Last Name: begins with [ ]
- Alternate Character Name: begins with [ ]

Additional options include:
 

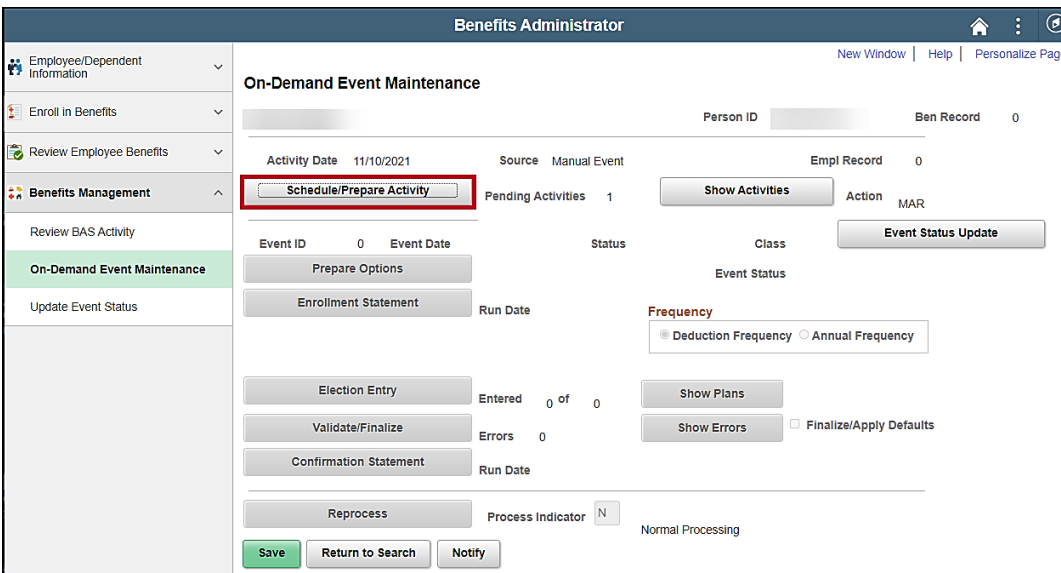
- Case Sensitive
- Limit the number of results to (up to 300): [ 300 ]

 The 'Search' button is highlighted with a red box.

6. Enter the **Search Criteria**.

7. Click the **Search** button.

The **On-Demand Event Maintenance** page displays.



The screenshot shows the 'On-Demand Event Maintenance' page after a search. The table displays the following information:

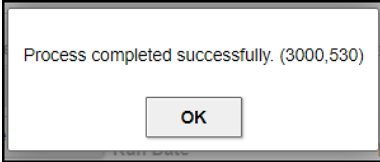
Activity Date	Source	Pending Activities	Action
11/10/2021	Manual Event	1	MAR

The 'Schedule/Prepare Activity' button is highlighted with a red box. Other buttons visible include 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', and 'Notify'.

8. Click the **Schedule/Prepare Activity** button.

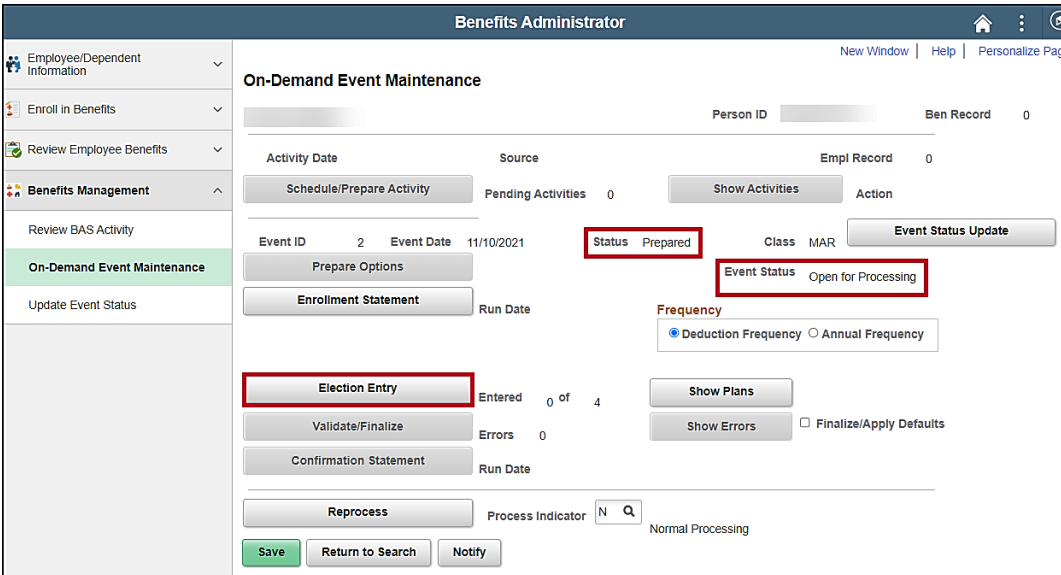
If the **Schedule/Prepare Activity** button is disabled, the BenAdmin Batch Process has already prepared the activity and you can proceed to the next step.

A pop-up message displays.



9. Click the **OK** button.

The **On-Demand Event Maintenance** page displays.

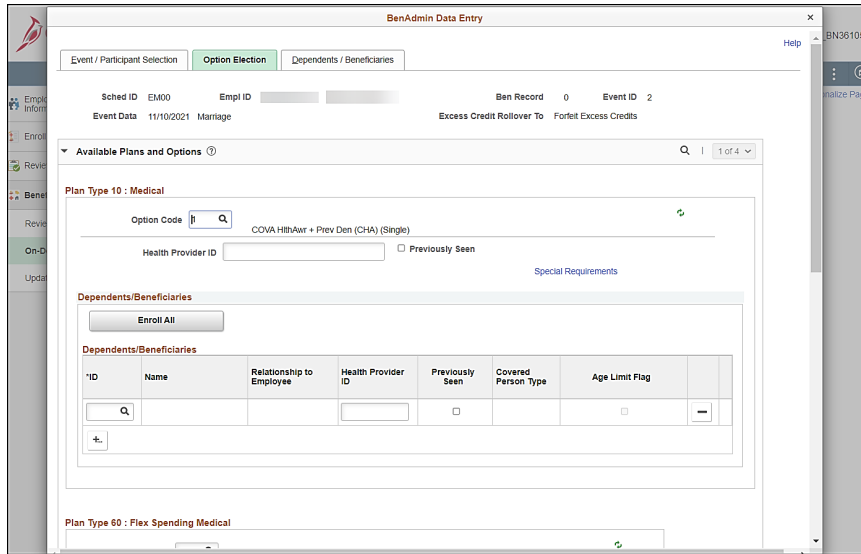


10. Notice the **Status** is now “Prepared” and the **Event Status** is “Open for Processing”.

11. Click the **Election Entry** button.

**BN361 Open Enrollment Life Event**

The **BenAdmin Data Entry** page displays in a pop-up window.

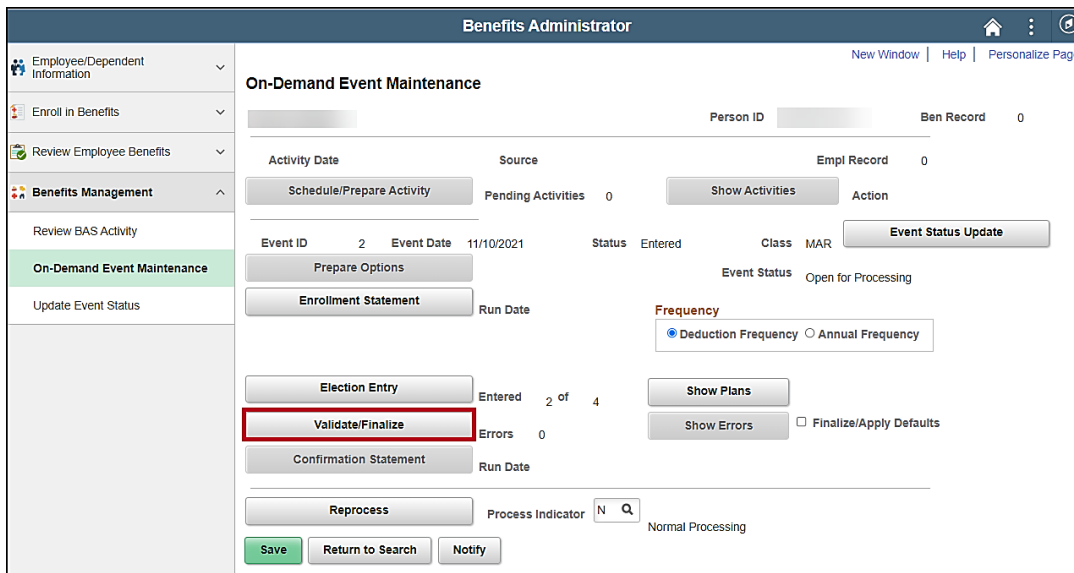


12. Update the employee's benefit elections.

**Note:** If a dependent on the policy is 26 years old, you will receive a warning message. This is a soft warning, and you can click the **OK** button.

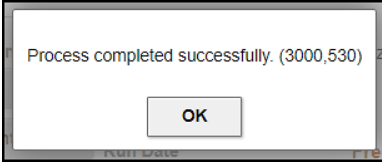
13. Click the **Save** button, after updating the employee's benefit elections.

The **On-Demand Event Maintenance** page displays



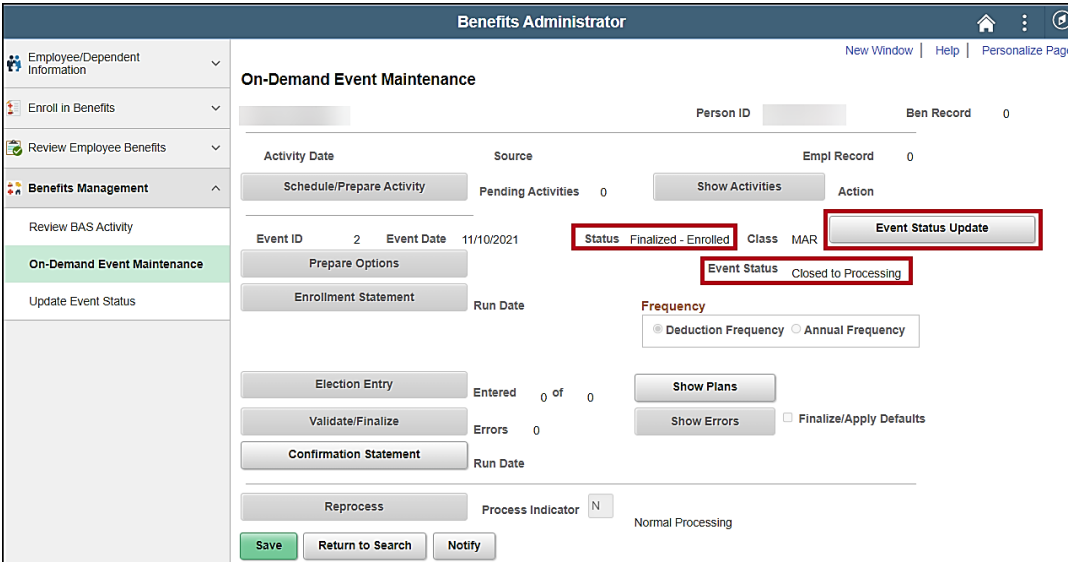
14. Click the **Validate/Finalize** button.

A pop-up message displays.



15. Click the **OK** button.

The **On-Demand Event Maintenance** page displays.

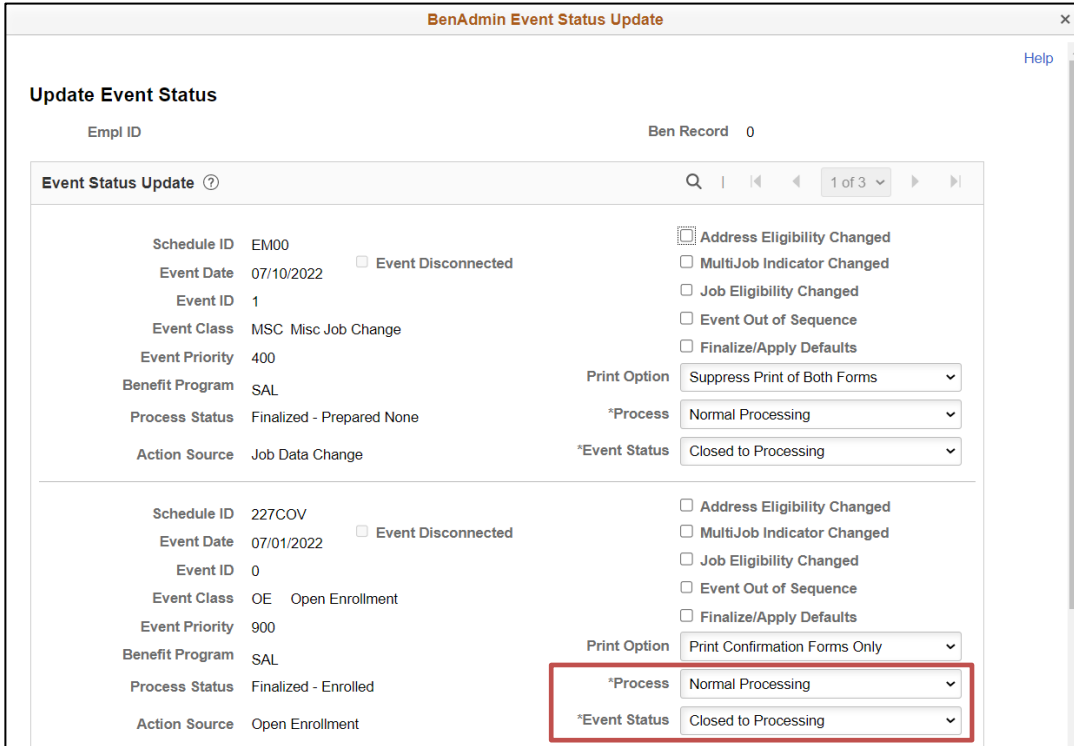


16. Notice the **Status** is “Finalized – Enrolled” and the **Event Status** is “Closed to Processing”.

17. Click the **Event Status Update** button and review the Employee’s Events.

**BN361 Open Enrollment Life Event**

The **BenAdmin Event Status Update** page displays in a pop-up window.



**Update Event Status**

Empl ID \_\_\_\_\_ Ben Record 0

**Event Status Update** ②

Schedule ID	EM00	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	07/10/2022		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	1		<input type="checkbox"/> Job Eligibility Changed
Event Class	MSC Misc Job Change		<input type="checkbox"/> Event Out of Sequence
Event Priority	400		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	SAL	Print Option	Suppress Print of Both Forms
Process Status	Finalized - Prepared None	*Process	Normal Processing
Action Source	Job Data Change	*Event Status	Closed to Processing

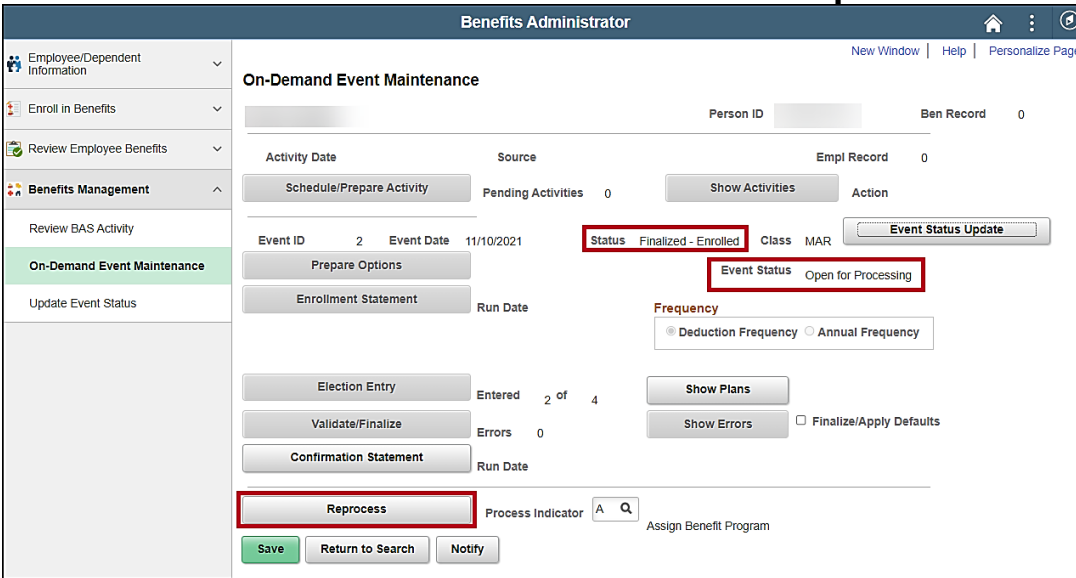
  

Schedule ID	227COV	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	07/01/2022		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	0		<input type="checkbox"/> Job Eligibility Changed
Event Class	OE Open Enrollment		<input type="checkbox"/> Event Out of Sequence
Event Priority	900		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	SAL	Print Option	Print Confirmation Forms Only
Process Status	Finalized - Enrolled	*Process	Normal Processing
Action Source	Open Enrollment	*Event Status	Closed to Processing

18. Select **Assign Benefit Program** from the **Process** drop-down list.
19. Select **Open for Processing** from the **Event Status** drop-down list.
20. Click the **OK** button.

**Note:** This will wipe away the enrollments the employee made to OE prior to the Life Event. Ensure you have noted the employee's elections. This is an important step because it allows you to pull in the changes that were made in the Life Event into the OE Enrollment.

The **On-Demand Event Maintenance** page displays.

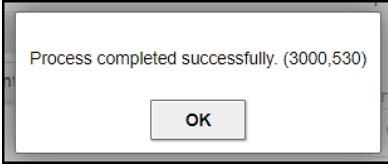


The screenshot shows the 'Benefits Administrator' interface for 'On-Demand Event Maintenance'. The left sidebar contains navigation options: Employee/Dependent Information, Enroll in Benefits, Review Employee Benefits, Benefits Management (expanded), Review BAS Activity, On-Demand Event Maintenance (highlighted), and Update Event Status. The main content area displays event details for Event ID 2, dated 11/10/2021, with a status of 'Finalized - Enrolled' and a class of 'MAR'. The event status is 'Open for Processing'. A 'Reprocess' button is highlighted with a red box. Other buttons include 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Save', 'Return to Search', and 'Notify'. The 'Reprocess' button is located at the bottom left of the main content area.

21. Notice the Status is still Finalized – Enrolled and the Event Status is now Open for Processing.
22. Click the **Reprocess** button.



A message displays in a pop-up window.



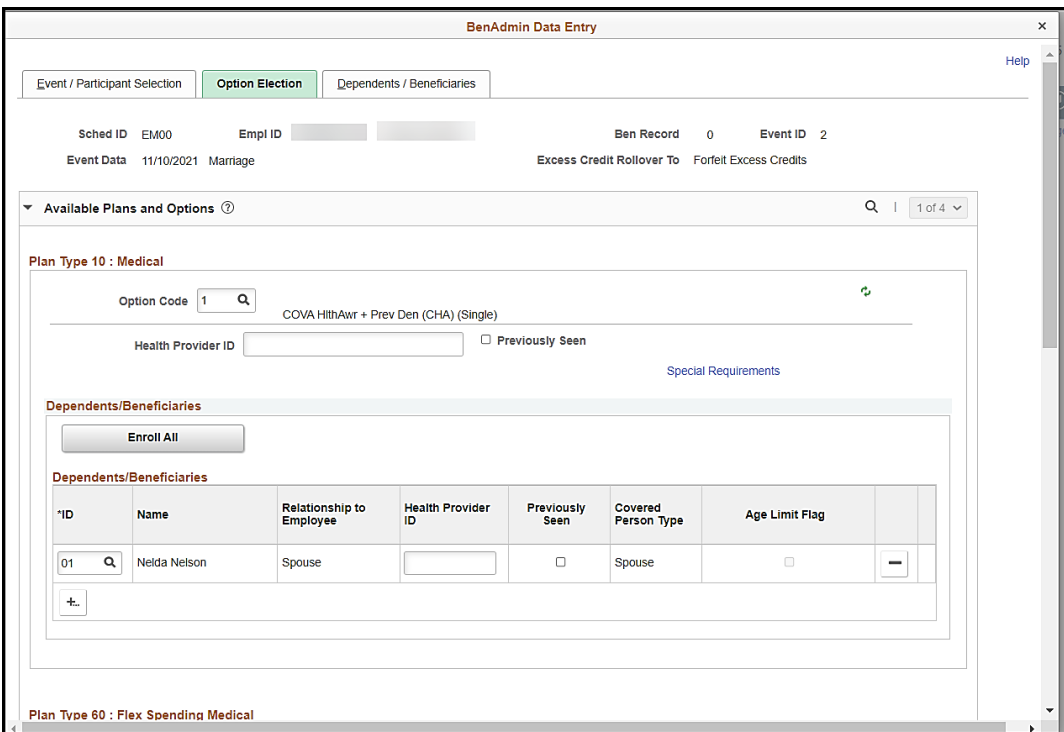
23. Click the **OK** button.

The **On-Demand Event Maintenance** page displays.

24. Notice the Status is Prepared and the Event Status is Open for Processing.

25. Click the **Election Entry** button.

The **BenAdmin Data Entry** page displays in a pop-up window.



The screenshot shows the 'BenAdmin Data Entry' window with the following details:

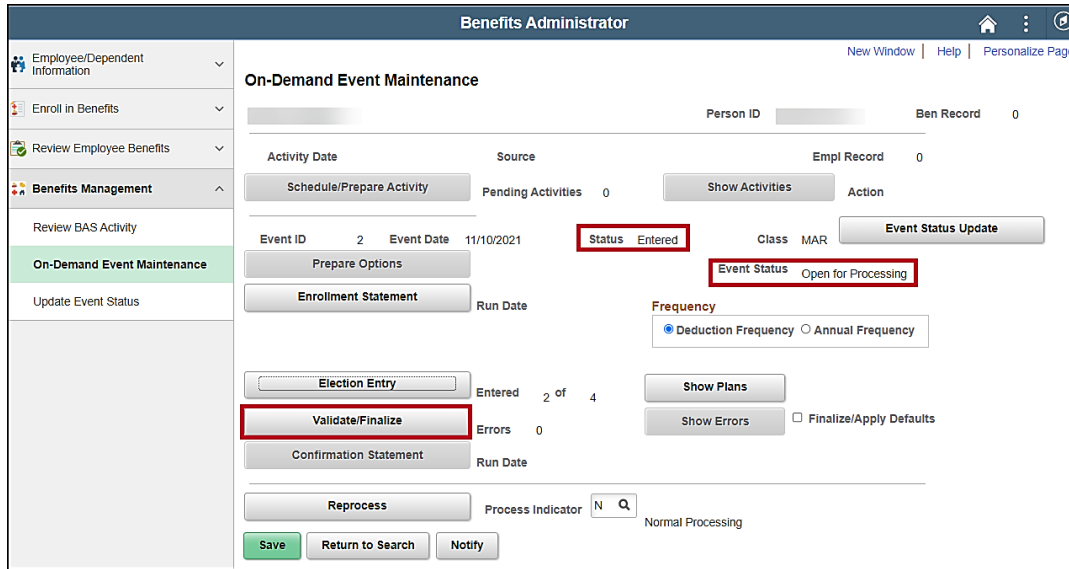
- Event / Participant Selection** (Active tab)
- Option Election** (Selected tab)
- Dependents / Beneficiaries** (Available tab)
- Sched ID: EM00, Empl ID: [Redacted], Ben Record: 0, Event ID: 2
- Event Data: 11/10/2021, Marriage, Excess Credit Rollover To: Forfeit Excess Credits
- Available Plans and Options**: Plan Type 10: Medical
- Option Code: 1, COVA HlthAwr + Prev Den (CHA) (Single)
- Health Provider ID: [Redacted],  Previously Seen
- Dependents/Beneficiaries**: Enroll All button
- Table of Dependents/Beneficiaries:
 

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Nelda Nelson	Spouse	[Redacted]	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
- Plan Type 60: Flex Spending Medical (Visible at the bottom)

26. Update the employee's enrollment elections for OE.

27. Click the **OK** button at the bottom of the page after all elections have been updated.

The **On-Demand Event Maintenance** page displays.



**Benefits Administrator**

Employee/Dependent Information | Enroll in Benefits | Review Employee Benefits | **Benefits Management** | Review BAS Activity | **On-Demand Event Maintenance** | Update Event Status

**On-Demand Event Maintenance**

Person ID: [ ] Ben Record: 0

Activity Date: [ ] Source: [ ] Empl Record: 0

Schedule/Prepare Activity | Pending Activities: 0 | Show Activities | Action

Event ID: 2 | Event Date: 11/10/2021 | **Status: Entered** | Class: MAR | Event Status Update

Prepare Options | **Event Status: Open for Processing**

Enrollment Statement | Run Date

Frequency:  Deduction Frequency  Annual Frequency

Election Entry | Entered: 2 of 4 | Show Plans

**Validate/Finalize** | Errors: 0 | Show Errors |  Finalize/Apply Defaults

Confirmation Statement | Run Date

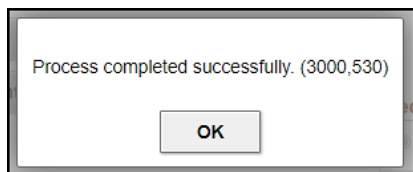
Reprocess | Process Indicator: N | Normal Processing

Save | Return to Search | Notify

28. Notice the Status is Entered and the Event Status is Open for Processing.

29. Click the **Validate/Finalize** button.

A message displays in a pop-up window.

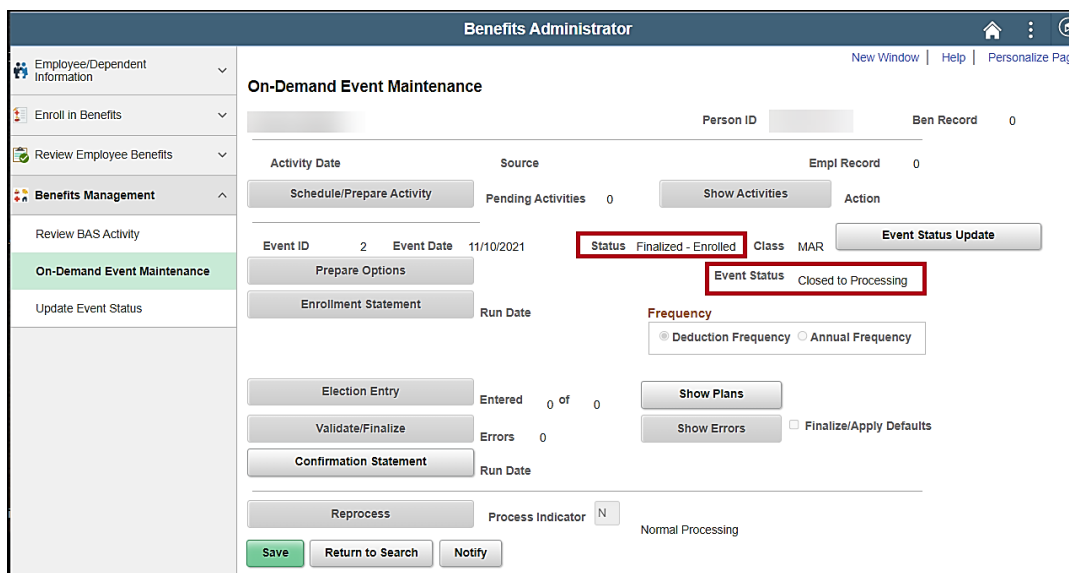


Process completed successfully. (3000,530)

OK

30. Click the **OK** button.

The **On-Demand Event Maintenance** page displays.



**Benefits Administrator**

Employee/Dependent Information | Enroll in Benefits | Review Employee Benefits | **Benefits Management** | Review BAS Activity | **On-Demand Event Maintenance** | Update Event Status

**On-Demand Event Maintenance**

Person ID: [ ] Ben Record: 0

Activity Date: [ ] Source: [ ] Empl Record: 0

Schedule/Prepare Activity | Pending Activities: 0 | Show Activities | Action

Event ID: 2 | Event Date: 11/10/2021 | **Status: Finalized - Enrolled** | Class: MAR | Event Status Update

Prepare Options | **Event Status: Closed to Processing**

Enrollment Statement | Run Date

Frequency:  Deduction Frequency  Annual Frequency

Election Entry | Entered: 0 of 0 | Show Plans

Validate/Finalize | Errors: 0 | Show Errors |  Finalize/Apply Defaults

Confirmation Statement | Run Date

Reprocess | Process Indicator: N | Normal Processing

Save | Return to Search | Notify

31. Confirm the Status is Finalized – Enrolled and the Event Status is Closed to Processing.