

Unlocking an Enrollment Window

To allow your employees to make new elections or qualified changes to their enrollments, you will first need to Unlock an Enrollment Window. To unlock all employees for Open Enrollment, please refer to the Open Enrollment Quick Start Guide.

1. From the Employees tab, 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 window, a summary of benefit elections if they have previously enrolled, and a button to Unlock an enrollment window.

The screenshot shows the 'Benefits' tab for an employee named Melissa McMurry. The interface includes a sidebar with navigation icons, a top header with a 'Back to Employees' link and a 'View as Employee' button. The main content area is divided into three sections: 'Enrollment Window', 'Benefits Summary', and a 'Total Per Pay Cost' summary.

Enrollment Window

Open Enrollment / Enrollment Status: **Not Started**
Window Closes in 4 Days

Elected Benefits ^

Product	Carrier	Plan	Coverage Level	Enrolled Members	Effective Date	Cost Per Pay
						TOTAL PER PAY COST: \$0

Unlock Enrollment Window
Unlock an enrollment window for current year plans, such as a new hire, newly benefit eligible (due to employment changes), and employee qualified life event.

[Unlock Enrollment](#)

Benefits Summary

Active | Prior | Waived

Product	Carrier	Plan	Coverage Level	Enrolled Members	Effective Date	Pay Per Cost	View
							Total Per Pay Cost
							\$0

4. 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 Type*

Qualified Life Event ▼

Qualified Life Event Reason*

Select ▼

Event Effective Date*

MM/DD/YYYY !

Additional details

Once employees complete enrollment, elections will pend for 3 days to allow for any election changes. After 3 days, the system will automatically close the enrollment window and approve all elections.

For employees who do not log in or complete enrollment, they will not be enrolled in any benefits and the enrollment window will automatically close after 30 days.

Cancel

Unlock

- a. 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.
- b. 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.
- c. 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.