

Administration Process Checklist

Use this checklist to ensure that you have satisfied your compliance and employer responsibilities for benefits administration.

NEW HIRES

Make sure employees have received all enrollment materials, including:

- Plan-specific changes and rates
- Plan-specific summaries
- Enrollment booklet and forms
- Deadline for enrollment (when they must submit completed forms)
- Resource contact information

CHANGES

Have your employee complete the following for any life change:

- Employee change request/form for medical, dental, life, vision, etc.
- Plan-specific changes and rates
- Plan-specific summaries
- Deadline for enrollment (within 30 days of life event)
- Resource contact information

TERMINATIONS

Make sure to process the following immediately following a termination:

- Carrier subscriber termination request for all lines of coverage
- COBRA notification (if applicable)

POST ENROLLMENT

Did you...

- Check enrollment forms for any missing information?
- Check enrollment forms for any information that was incorrectly filled out?
- [Submit](#) all enrollment forms to EMF Insurance Agency?
- Follow up and make sure all employees are clear about their benefits and don't have any outstanding questions?

IMPORTANT

Don't forget to complete forms if any of the following apply...

these forms can be accessed through your client portal provided by EMF

- | | |
|---------------------------------|-----------------|
| FMLA (Family Medical Leave Act) | ERISA |
| COBRA | CHIPRA |
| HSA (Health Savings Account) | Medicare Part D |

