# Benefit Enrollment Dashboard –

Pending EOI Requests

If you have benefit plans that allow the employee to choose their coverage amount (Voluntary Life, LTD Buy Up, etc.), iSolved makes it easy to handle your Evidence of Insurability (EOI) requests. Benefit Administrators will need to monitor the pending EOIs to ensure deduction and election amounts are correct. This document will review the process of navigating the Pending EOI Requests screen within iSolved.

Step 1: Access the Benefit Enrollment Dashboard

➢ Navigate to Employee Management > Employee Management Tools > Benefit Enrollment Dashboard

Step 2: Review 'Pending EOI Requests' Tab

➢ This tab will show all employees currently requesting enrollment in an applicable plan who have requested *over* the Guaranteed Issue.
➢ The left-side of the screen will show 'Filter Options.'
➢ Note: If you have multiple Enrollment Wizards built in iSolved, all wizards will appear for selection under 'Enrollment Period.' You will then need to select the checkbox of the Enrollment Wizard you wish to review.
➢ You can also decide if you would like to look at eligibility based on a specific 'Enrollment Status.' Once all filter options are selected, click 'Filter.'
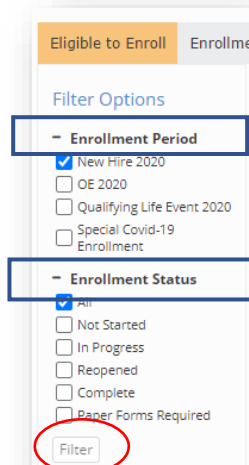
➤ Once you select 'Filter,' iSolved will populate the following information:

  ○ Employee Number and Name
  ○ Benefit Plan and Coverage
  ○ Start Date of the benefit
  ○ Actual Amount (amount currently given to the employee. This number is what the deduction will be calculated by)
  ○ Requested Amount (amount the employee has requested)
  ○ Approved/Rejected Date

	⇕ Name	⇕ EE Number	⇕ Benefit Plan ...	⇕ Benefit Plan	⇕ Coverage	⇕ Start Date	⇕ Actual Amou...	⇕ Requested A...	⇕ Status	⇕ Approved/Re... Date
☐	Arnold, Hazel D	1229	Vol Life EE	Vol Life/AD&D - ...	EE ONLY	7/1/2019	100000	120,000.00 ⌄	Pending ⌄	

Step 3: Starting the EOI Process

➤ Once an employee appears in the EOI dashboard, the carrier will require an EOI (Evidence of Insurability) form to be completed before an approval for the full amount can be granted.

➤ How do employees received the form?
  ○ Some carriers will send the EOI form directly to the employee
  ○ Most forms are given to employees from Human Resources.
  ○ Please check with your broker or carrier to determine which party is responsible for distributing the forms.

➤ Once you have received notice from your carrier that an employee is approved:
  ○ Check the box next to the employee's name
  ○ Change the status to Approved
  ○ Select the date the approval was given.

➤ Once this is filled out for all approvals you have received, select the 'Process Selected Transactions' in the upper left corner and hit Process.

➢ Once you hit 'Process' the rows you selected will dissapear from the 'Pending EOI Requests' and move to the employee's Benefit Plan screen. The approval will update the deduction amount to calculate from the approved amount from this payroll moving forward.

Frequently Asked Questions:

➢ My employee's status is 'Pending Late Entrant', what does that mean?
  ○ This occurs when an employee has requested coverage outside of their initial 30 days of employment. These types of requests will give the employee $0 in coverage until approved.
➢ What if my employee is approved for a different amount than what was requested?
  ○ You would change the requested amount to what was approved and follow the process for an approval.
➢ What do I do if an employee is rejected?
  ○ If an employee requested above the Guaranteed Issue, but the provider approved the employee for the Guaranteed Issue amount only, you will change their status to 'Rejected'. They will continue to be deducted for the Guaranteed Issue, not the requested amount.
➢ Note: You can make the status change on the Benefit Enrollment Dashboard, as shown previously, or on the employees actual election under Employee Management > Employee Benefits > Benefit Plans, as shown below.

⇕ Start Date	⇕ Benefit	⇕ Benefit Plan	⇕ Override Plan Limit
7/1/2019	Vol Life CH	Coverage Waived	
7/1/2019	Vol Life EE	Vol Life/AD&D - Employee	
7/1/2019	Vol Life SP	Vol Life/AD&D - Spouse	

＋Add New   ☑ Edit   🗑 Delete   ⟳ Refresh   💾 Save   ↺ Cancel

Benefit Plan

* Plan: Vol Life/AD&D - Employee - Vol Life/AD&D - Employee
* Start Date: 7/1/2019
* Coverage: EE ONLY - EE ONLY
Stop Date:
Benefit End Reason:
Plan Stop Date: 12/31/2099
Enrollment Submission Date: 5/22/2019
Plan Enrollment Date:
Eligibility Date: 1/1/2019
Participant Id:

Guaranteed Issue/EOI

Plan GI Amount: 100,000.00
Requested Coverage Amount: 120000.00
Status: Rejected
Approved/Rejected Date: 9/8/2020

Employee Notes

Notes:

Coverage Options

Actual Coverage Amount: 100000.00
Per Pay Amount: 11.75