

User Guide

User Guide – Creating an Open Enrollment



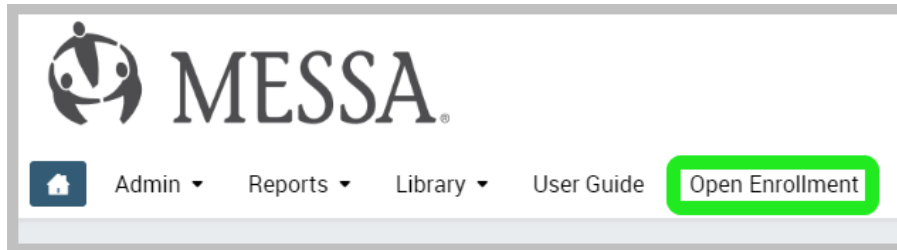
Creating an Open Enrollment

The employer is responsible for creating the Open Enrollment for all groups within their company that have MESSA benefits. Creating an Open Enrollment will present an enrollment window for employees to make changes to their benefits during their open enrollment period.

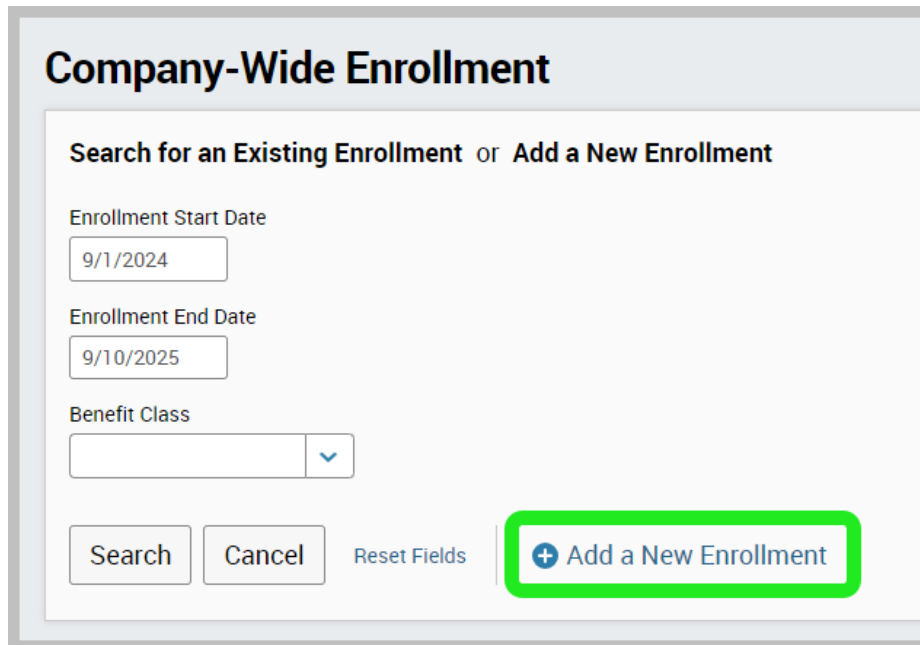
Open Enrollment periods will need to be **created, updated and maintained on an annual basis by the employer.**

To create an Open Enrollment for your employees:

- Click on the “**Open Enrollment**” tab.



- Click on “**Add a New Enrollment**”.

A screenshot of the "Company-Wide Enrollment" form. The title "Company-Wide Enrollment" is at the top in a bold, sans-serif font. Below the title is a section header: "Search for an Existing Enrollment or Add a New Enrollment". There are three input fields: "Enrollment Start Date" with the value "9/1/2024", "Enrollment End Date" with the value "9/10/2025", and "Benefit Class" which is a dropdown menu currently showing an empty field with a downward arrow. At the bottom of the form are four buttons: "Search", "Cancel", "Reset Fields", and "+ Add a New Enrollment". The "+ Add a New Enrollment" button is highlighted with a green rectangular border.

1. Select Benefit Classes

- Click on the Benefit Class that you would like to set up. Select one benefit class at a time. “Select All” will not give you the correct benefit plans.
- Click on the “**Get Plan Types**”. This will populate all of the benefits that this Benefit Class is eligible for.

1. Select Benefit Classes

123B - Teachers

123C - BUS DRIVER D/V Only

123D

123E - Municipal - Med, No BTL

123F - Municipal Med,Dent,Vis

123G - Municipal Med with BTL

123H - Med/Vis

123I - Test Balance+

366 Demo

COBRA

Principal with Med Only

Get Plan Types

**During the set-up process the site refers to Open Enrollment as Company Wide Enrollment, but when this is presented to the employees, the site refers to it as Open Enrollment.*

2. Select Benefit Plans Types

- You **MUST** click the “**Select All**” button so that all of the benefits are available during the Open Enrollment period. Leave the drop-down box set to “Passive”.

2. Select Benefit Plans Types

Basic Term Life Passive

Dental Passive

Long Term Disability Passive

Medical Passive

Negotiated AD&D Passive

Negotiated Life Passive

- **Ongoing Enrollment Options** – leave as “Ongoing Enrollment”.
- **Open Enrollment Extension Window Options** – Leave as “Extend Enrollment Window”.

A screenshot of a web interface showing two dropdown menus. The first menu is titled "Ongoing Enrollment Options" and has "Ongoing Enrollment" selected. The second menu is titled "Open Enrollment Extension Window Options" and has "Extend Enrollment Window" selected.

- **Select Users** –Uncheck “Not Active” and “Retiree”. Only check “Retiree” if you have a group(s) with MESSA retiree benefits.

A screenshot of a "Select Users" form. It contains four checkboxes: "Active" (checked), "Not Active" (unchecked), "COBRA" (checked), and "Retiree" (unchecked).

3. Select Effective Date Rules

- **“Effective Date”** – leave at **“Specified Date”** and enter the **effective date of your Open Enrollment Changes**.
- **“Enrollment Begin Date”** – enter the first day of the employee’s open enrollment period.
- **“Enrollment End Date”** – enter the last day of the employee’s open enrollment period.

A screenshot of the "3. Select Effective Date Rules" form. The "Effective Date" dropdown is set to "Specified Date". Below it, there are three input fields: "Enrollment Begin Date", "Enrollment End Date", and a field highlighted with a green box. A red arrow points from this green box to another green box containing the text: "The date open enrollment changes are effective."

By entering these dates, the Open Enrollment window will automatically open on the “Enrollment Begin Date” and close on the “Enrollment End Date” for your employees. Any changes they make during this time frame will have the effective date that is entered in the “Effective Date” field.

- **“Pend enrollment until approval of HR Manager”** – check this box so that all benefit changes that are entered by an employee will be pending until reviewed and accepted by the Benefits Administrator.
- Click **“Save”**.

Pend Enrollments

Pend enrollment until approval of HR Manager

Extending an Existing Open Enrollment Period

To extend your Open Enrollment sign-up period:

- Click on the **“Open Enrollment”** tab.

MESSA

[Admin](#) [Reports](#) [Library](#) [User Guide](#) **Open Enrollment**

- Enter the original **“Enrollment Start Date”** and the **“Enrollment End Date”** for the Open Enrollment you wish to extend.
- Click **“Search”**.

Company-Wide Enrollment

Search for an Existing Enrollment or Add a New Enrollment

Enrollment Start Date
9/1/2024

Enrollment End Date
9/10/2025

Benefit Class
[Dropdown menu]

[Reset Fields](#) | [+ Add a New Enrollment](#)

- Select the “**Benefit Class**” that you would like to extend.

Benefit Class	Benefit Plan Type	Effective Date	Enrollment Start Date	Enrollment End Date	Pending	Ongoing	Allowable Changes	Enrollment Extension Available
<input type="checkbox"/> 123B - Teachers	Dental - Passive Vision - Passive Negotiated AD&D - Passive Basic Term Life - Passive Negotiated Life - Passive Long Term Disability - Passive Optional Short Term Disability - Passive Optional Accident - Passive Optional Survivor Income Insurance - Passive Medical - Passive Optional Long Term Disability - Passive Optional Supplemental Term Life - Passive Optional Dependent Life - Passive Optional Basic Term Life - Passive Optional Bundled Protection (Accident, Critical Illness, Hospital Indemnity) - Passive Optional Hospital Indemnity - Passive Optional Critical Illness - Passive	Specified Date: 01/01/2025	9/1/2024	9/30/2024	Y	N		N

- Scroll to the bottom of page to “**3. Select Effect Date Rules**” and change the “**Enrollment End Date**” to the date you would like to extend the Open Enrollment sign-up period to. This will extend the Open Enrollment period for all employees in that Benefit Class.
- Click “**Save**”.

3. Select Effective Date Rules

Effective Date Specified Date

1/1/2025

Enrollment Begin Date 9/1/2024

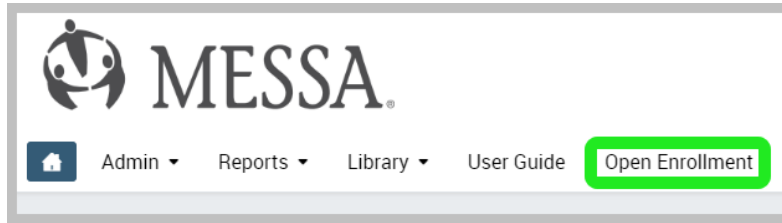
Enrollment End Date 9/30/2024

Pend Enrollments

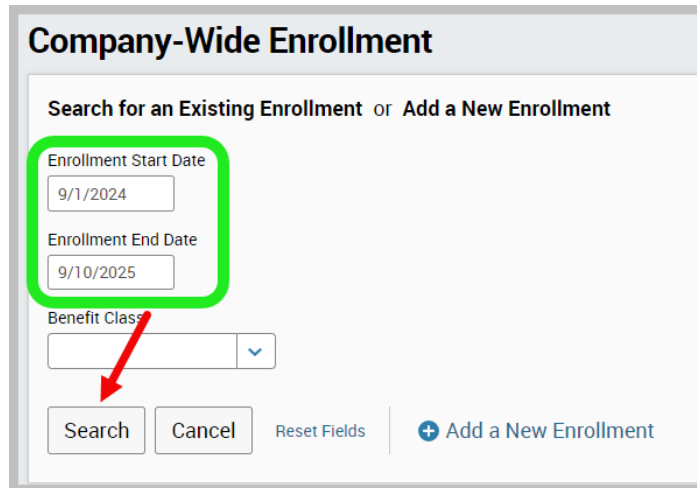
Pend enrollment until approval of HR Manager

Search for an Existing Open Enrollment

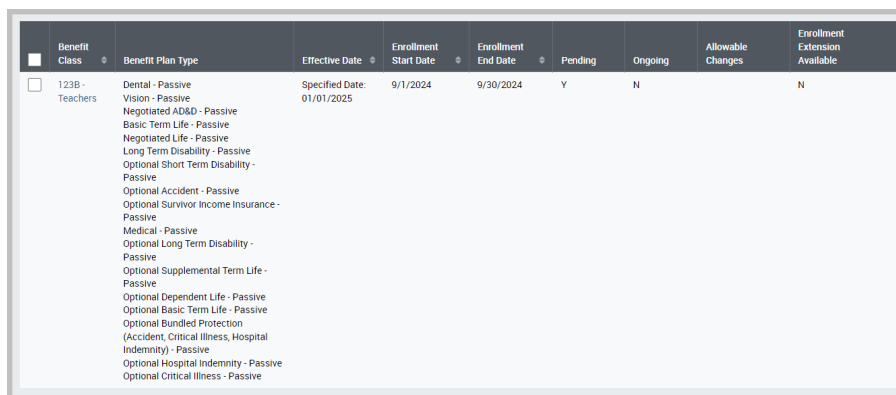
- Click on the “**Open Enrollment**” tab.



- The “Enrollment Start Date” automatically defaults to today’s date and the “Enrollment End Date” automatically defaults to one year from today’s date.
- Change the “**Enrollment Start Date**” to 1/1/XXXX (current year) and the “**Enrollment End Date**” to 12/31/XXXX (current year).

The image shows a search form titled 'Company-Wide Enrollment'. At the top, it says 'Search for an Existing Enrollment or Add a New Enrollment'. Below this are two date input fields: 'Enrollment Start Date' with the value '9/1/2024' and 'Enrollment End Date' with the value '9/10/2025'. These two fields are enclosed in a green rectangular highlight. Below the date fields is a 'Benefit Class' dropdown menu. At the bottom of the form are four buttons: 'Search', 'Cancel', 'Reset Fields', and '+ Add a New Enrollment'. A red arrow points from the 'Search' button towards the 'Benefit Class' dropdown.

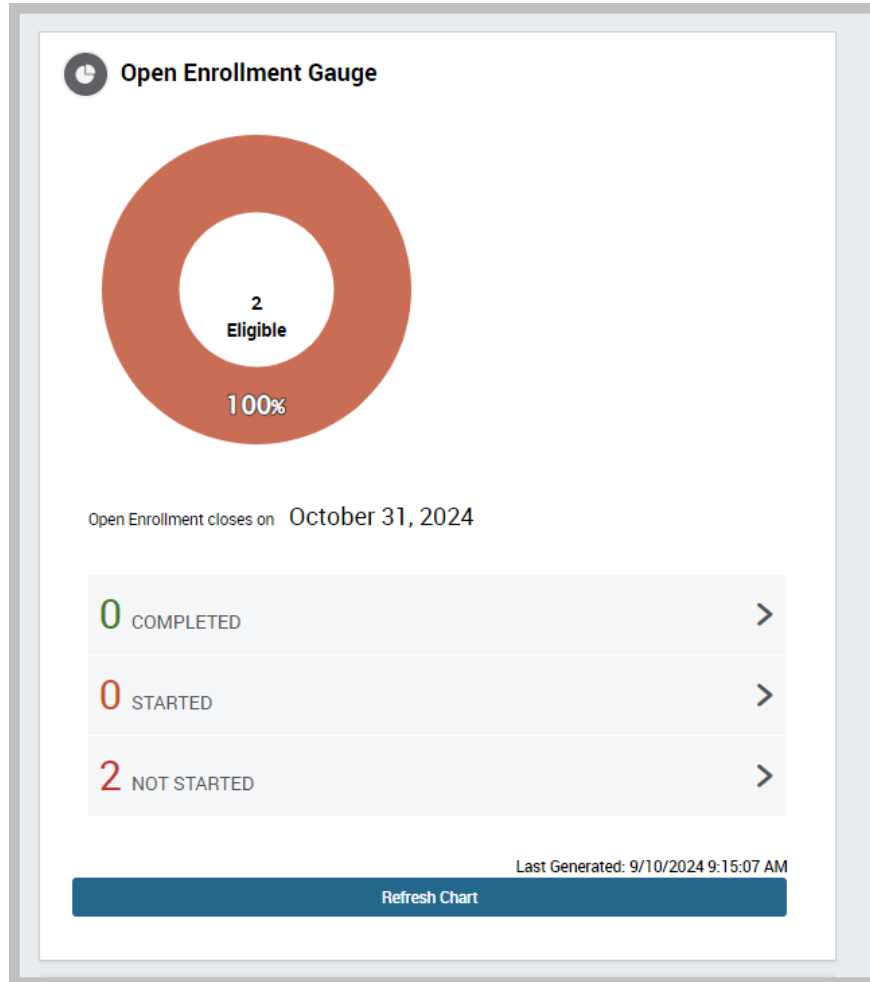
- Click “**Search**”. This will display all existing open enrollments that have an “Enrollment Start Date” during the current year.

The image shows a table of search results. The table has the following columns: 'Benefit Class', 'Benefit Plan Type', 'Effective Date', 'Enrollment Start Date', 'Enrollment End Date', 'Pending', 'Ongoing', 'Allowable Changes', and 'Enrollment Extension Available'. The first row shows a checkbox, the benefit class '123B Teachers', a list of benefit plan types including 'Dental - Passive', 'Vision - Passive', 'Negotiated AD&D - Passive', 'Basic Term Life - Passive', 'Negotiated Life - Passive', 'Long Term Disability - Passive', 'Optional Short Term Disability - Passive', 'Optional Accident - Passive', 'Optional Survivor Income Insurance - Passive', 'Medical - Passive', 'Optional Long Term Disability - Passive', 'Optional Supplemental Term Life - Passive', 'Optional Dependent Life - Passive', 'Optional Basic Term Life - Passive', 'Optional Bundled Protection (Accident, Critical Illness, Hospital Indemnity) - Passive', and 'Optional Hospital Indemnity - Passive'. The 'Effective Date' is 'Specified Date: 01/01/2025', 'Enrollment Start Date' is '9/1/2024', and 'Enrollment End Date' is '9/30/2024'. The 'Pending' status is 'Y' and 'Ongoing' is 'N'. The 'Allowable Changes' and 'Enrollment Extension Available' columns are empty.

- Review the Benefit Class, Effective Date, Enrollment Start Date and the Enrollment End Date (highlighted above) for the open enrollment you’re searching for.

Monitoring an Existing Open Enrollment

- During your Open Enrollment period there will be an “**Open Enrollment Gauge**” available on your home page.

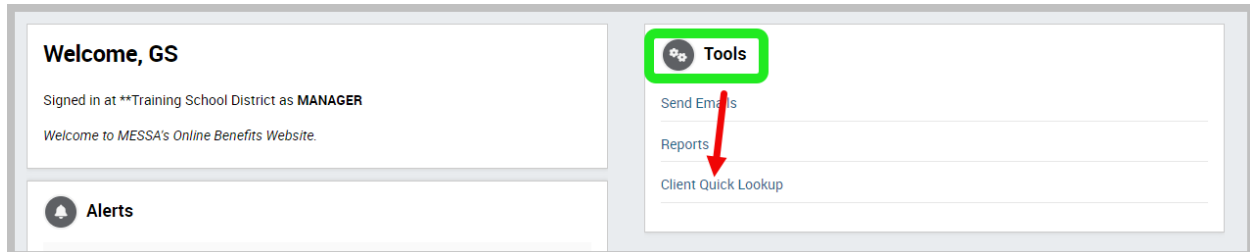


- The top portion shows you how many employees are eligible for Open Enrollment and the percentages of the employees who have completed, started and not started their Open Enrollment.
- It will also remind you when the Open Enrollment period closes.
- To get detailed information on each category, click on the category and it will open a separate tab with the individual employee information for that category.

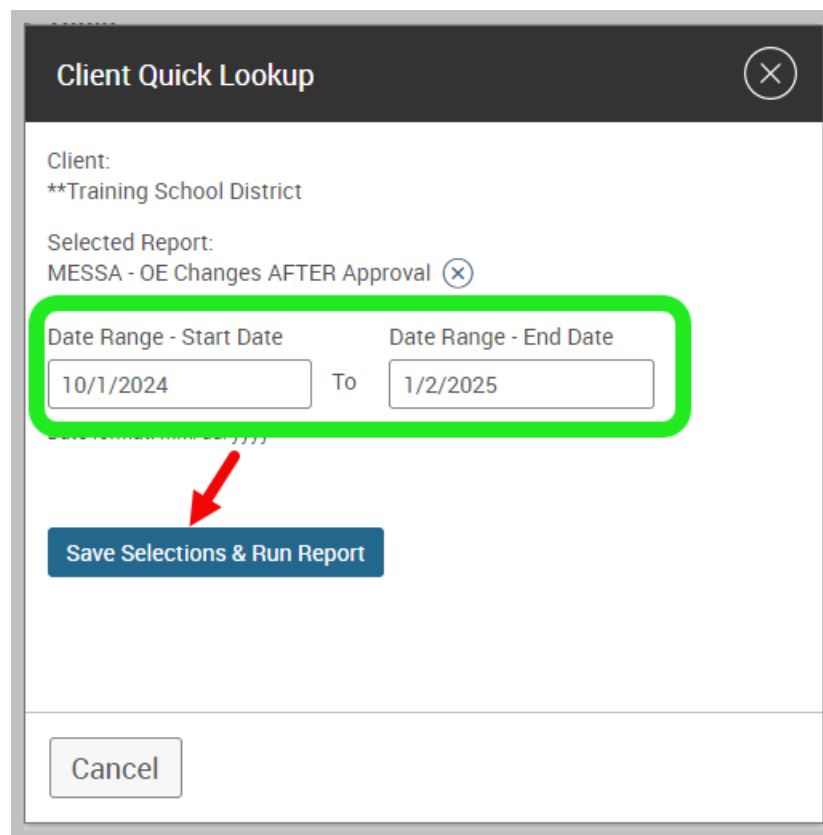
OE Changes AFTER Approval Report

This report lists approved changes made to any employee during Open Enrollment.

- To locate this report, click Client Quick Lookup under the Tools section of your online enrollment home page.



- Click on the report titled MESSA – OE Changes AFTER Approval
- Enter the start date of your open enrollment and enter the day after your effective date.
 - i.e. If your open enrollment effective date is 1/1/2021, enter 1/2/2021 for your end date.
- Click Save Selections & Run Report.

A screenshot of the "Client Quick Lookup" dialog box. The dialog box has a dark header with the title "Client Quick Lookup" and a close button (X). Below the header, the "Client:" field is set to "**Training School District". The "Selected Report:" field is set to "MESSA - OE Changes AFTER Approval" with a close button (X). Below this, there are two date input fields: "Date Range - Start Date" and "Date Range - End Date". The start date is "10/1/2024" and the end date is "1/2/2025". A red arrow points to the "Save Selections & Run Report" button. At the bottom of the dialog box, there is a "Cancel" button.