


➤ *How to cancel a specific line of coverage
(Employee is actively employed)*

➤ *Please be advised, if you are retro or future terming MORE than 30 days, most carriers will “reject” this change and may not reflect accurately on your invoicing. To ensure the carrier does not reject these changes that are outside a 30-day window, you may need to manually update as well in the carrier portal.*

Step	Action										
1	Search for employee from Home Screen as described above.										
2	Click on Edit										
3	<p>Click on the “Coverage” Tab</p>  <p>The screenshot shows a navigation menu with the following items: Recent, Applications, Beneficiaries, Contact, Coverage (highlighted), Custom, Reports, Deliveries, and Notes. Below the menu is a checkbox labeled 'Show Coverage History'. At the bottom is a table of current benefits:</p> <table border="1" data-bbox="337 1094 1320 1255"> <thead> <tr> <th>Plan</th> <th>Cvg</th> <th>EE Cost</th> <th>EE Add Cost</th> <th>ER Cost</th> </tr> </thead> <tbody> <tr> <td>▶ Health - Accident Expense</td> <td>EO</td> <td>4.62</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>	Plan	Cvg	EE Cost	EE Add Cost	ER Cost	▶ Health - Accident Expense	EO	4.62	0.00	0.00
Plan	Cvg	EE Cost	EE Add Cost	ER Cost							
▶ Health - Accident Expense	EO	4.62	0.00	0.00							
4	You’ll see all the current benefits the employee is enrolled in.										
5	If you’d like to see the prior coverages (history) – click on the “Show Coverage History” check box – this will display previously cancelled/terminated benefits.										

Recent Applications Beneficiaries Contact

Coverage Custom Reports Deliveries Notes

Show Coverage History

Plan	Cvg	EE Cost	EE Add Cost	ER Cost
Health - Accident Expense	EO	4.62	0.00	0.00

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Click on the pencil to the far right of the coverage you're wanting to cancel/terminate.

Recent Applications Beneficiaries Contact

Coverage Custom Reports Deliveries Notes Demographics Forms Employment EDI Events History Life Events Sessions Work History Pay History

Show Coverage History Filter

Plan	Cvg	EE Cost	EE Add Cost	ER Cost	Option Code	Pretax	Lump Sum Amount	Amount	Effective Date	Term Date	Deduction Date	End Deduction Date	Cycle	Policy Date	Policy #	Event
Health - Accident Expense	EO	4.62	0.00	0.00	N			0.00	5/1/2017		5/1/2017		26			A

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From the "info" tab (default view) – scroll down to "Termination Date" field and "End Deduction Date" field – enter the date you want the coverage cancelled/terminated.



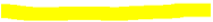
Termination Date:

End Deduction Date:

Policy Number:

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Scroll down to "reason type" at the bottom of the screen – choose the reason for the termination. The "Notes" field is required, therefore you must add a note to the reason why you are processing a termination, before the termination is complete (be specific)

	<p>Event Date: 10/03/2017 </p> <p>Reason Type: <Choose reason> </p> <p></p> <p>Update Terminate Cancel Lock</p>
10	Click "terminate" button
NOTE	<i>This will not trigger a new (updated) Benefit Confirmation form – if you want the benefit confirmation to be updated, use the "life events" instructions below</i>