EMPLOYEE ONBOARDING TOOL (FOR HR USE)

Employee name: _____

Full time hire date: _____ Part time hire date (if applicable): _____

Date the employee meets or exceeds the hour requirement (usually the same as the DOH): _____

Benefit probation period: ☐ Date of hire (DOH)
☐ First of the month following the DOH
☐ First of the month following 30 days from the DOH
☐ First of the month following 60 days from the DOH
☐ 90th day from the DOH (ACA maximum)

Effective date of benefits (once probation is met): _____

Step 1
One month prior to the effective date, distribute benefit material.

Step 2
By the 15th of the month prior to effective date, collect enrollment forms.

Step 3

EMPLOYEE IS ENROLLING	EMPLOYEE IS WAIVING
⌄	⌄
Add the employee through the carrier's web portal for employers	The next opportunity to enroll will be during your company's open enrollment period. If waiving your plan because of other qualified group insurance, the employee can enroll in your plan on the first of the month following the loss of other qualified group insurance.
OR	⌄
Send completed forms to WMF (contact your WMF representative)	Collect waiver form
⌄	⌄
⌄	END (do not continue to step 4)

Step 4
Notify the employee that carrier welcome material and ID cards will arrive in the mail within 10 business days. Most carrier smartphone applications can be used as a mobile ID, and they also have tools to help manage care and benefits.

Step 5
Verify the next billing statement reflects the new enrollment.