

BENEFITS ENROLLMENT CHECKLIST

Utilize this Benefits Enrollment Checklist to seamlessly guide you through the enrollment process. The checklist ensures you do not overlook important tasks and adhere to NMPSIA's rules of enrollment.

1. Pre-Enrollment Tasks

- Evaluate current insurance needs
- Identify an enrollment opportunity (Have you experienced a qualifying event or is it currently the Annual Open/Switch Enrollment window?)
- Research available providers on the NMPSIA website
- Ask HR to meet to discuss any uncertainties you might have up to this point

2. During Enrollment

- Attend benefits orientation (if one is not offered, HR may request NMPSIA support) and ask questions to clarify uncertainties
- Choose the appropriate plan options
- Submit your request to add or change coverage via the MyBenefits Portal
- Submit enrollment request and all required supportive documentation before deadline
- Check with HR to ensure the supportive documents meet the criteria to support the request

3. Post-Enrollment Follow-Up

- Ensure receipt of Confirmation Notice, confirming all paperwork has been processed
- Keep a copy of forms and confirmation for your records
- Verify enrollment with insurance carrier(s) prior to any upcoming appointments

4. Mid-Year Updates and Changes (if needed)

- Understand how life changes will impact your benefits
- Check for updates from NMPSIA regarding new providers or plans offered
- Review current plan and assess any need for changes
- Modify or cancel benefits during Annual Open Enrollment period or with a qualifying event
- Ensure receipt of Confirmation Notice, confirming all paperwork has been processed