


<p>Office of Employee Benefits</p> <p>Administrative Manual</p> 	RETROACTIVE ELIGIBILITY ADJUSTMENTS	707
	EFFECTIVE DATE: SEPTEMBER 1, 2003	
	REVISION DATE:	
	PURPOSE: To set a general 90-day period for processing eligibility changes and to set a procedure for approving requests for retroactive eligibility adjustments outside the 90-day window	
	SCOPE: All retroactive eligibility adjustments made by a U.T. System Institution Benefits Office	
STATUTORY AND ADMINISTRATIVE REFERENCES: Texas Insurance Code, Chapter 1601		

1.0 THE 90-DAY RETROACTIVE ADJUSTMENT WINDOW FOR ELIGIBILITY INFORMATION

It is the policy of the U.T. System Office of Employee Benefits (OEB) to permit a component institution, at its own initiative, to make retroactive eligibility adjustments to eligibility information that has been captured by the component about a plan participant for a period of three months immediately preceding the current coverage month. This period is referred to as the 90-day retroactive adjustment window.

All related premiums for the coverage periods affected will be restated based on the adjusted information. All vendor contracts with OEB include a clause allowing for fee adjustment only during the 90-day window.

2.0 AUTHORIZATION FOR RETROACTIVE ELIGIBILITY ADJUSTMENT OUTSIDE 90-DAY WINDOW

Any request from a component institution for a retroactive eligibility adjustment that occurs outside of the 90-day retroactive adjustment window must be approved by OEB to ensure that the proposed change does not present a risk of financial exposure to OEB.

3.0 PROCESS FOR APPROVAL/DENIAL OF RETROACTIVE ELIGIBILITY ADJUSTMENT REQUEST

- a. The request must be made to OEB in writing by the component benefit staff requesting the change, and must include:
 - 1) the basis for the request;
 - 2) any available evaluation of eligibility as reported to OEB on SGELIG;

- 3) any available evaluation of premium remittance to OEB as documented on IFIS; and
 - 4) any available information accumulating from the Member Issue Data Base maintained by EGL.
- b. All available facts will be considered in determining whether to approve or deny the request.
 - c. The approval or denial of the request will be communicated by OEB to each of the following parties, as applicable:
 - 1) U.T. component institution representative;
 - 2) OEB Financial Analyst;
 - 3) OEB I/S for SGELIG modification; and
 - 4) OEB Benefit Coordinator.

4.0 ADDITIONAL DOCUMENTATION SUGGESTED

- a. All correspondence or e-mails distributed to any parties detailing the action plan (could include communication piece to the Plan administrator)
- b. Premium Billing Adjustment (if warranted)
- c. Vendor Self Bill Adjustment (if warranted)

5.0 DISTRIBUTION OF DOCUMENTATION

- a. Attach e-mail/VSB Adjustment to the monthly Vendor Self Bill document