Renew Accredited Employer Programme (AEP) Policy v20.0

Summary

Objective

To create and send contract renewal documents to Accredited Employers.

Owner Name withh

Expert Name withheld

Procedure

1.0 Renew AEP Policy
Accredited Employer Team Financial Analyst

a Request a Contract Details Run report from Business Systems and sort by Policy Expiration Date to identify renewing policies from mid-January.

> **NOTE** **What if the Audit Completion Date and Audit Result are blank?**
> Check if there are any relevant notes recorded and proceed as per the notes. If there are no notes check with the Employer Compliance Advisor or escalate to an appropriate manager if required.

> **NOTE** **#Workaround (WKA-107) You know there's a WPS attached to this AEP master - why isn't it showing in the roll up?**
> Rolling up WPS with no shareholders (e.g. renewals) to an AEP policy does not roll up to the AEP master. Users will not see the full roll up until Shareholders are added.

b Check the Plan Date in the Contract Details Run report to see what documentation must be sent to the customer.

> **NOTE** **What if the customer has a multi-year policy?**
> They don't need to be sent a contract variation for each policy term, unless they want to make a change to their contract options. Only Stop Loss Election and Stop Loss Declaration forms should be sent.

📄 AEP Workarounds

> **NOTE** **What does a policy renewal pack include?**
> • AEP Renewal Cover letter
> • AEP Contract Extension (2 copies)
> • Stop Loss Election (2 copies)
> • Stop Loss Declaration form (1 copy)
> • ACC5047 Application for change of contract options (1 copy)
> • AEP Contract Renewal Fact Sheet (1 copy).

📄 AEP Renewal Cover Letter

📄 AEP Contract Extension

📄 Stop Loss Election

📄 Stop Loss Declaration Form

📄 ACC5047 Accredited Employer Programme Application for Change of Contract Options

c Prepare and send the policy renewal pack to the customer.

d Create a Tracker workbook within the Contact Detail spread sheet, with the date the renewal pack is sent.

e Advise the relevant relationship managers that the pack has been sent so they can follow up.

f Request Business Systems Business Analyst to complete a bulk Note upload in Juno_CRM to advise that the documentation has been sent to customers.

2.0 Upload Policy Renewal Pack
Business Systems Business Analyst

a Complete a bulk Note upload to Juno_CRM to advise that the documentation has been sent to customers.

📄 Create Interaction on Customers Account

> **NOTE** **Can notes be added in bulk?**
> Notes can be added in bulk to Juno_CRM for all policies that have been sent a renewal pack.

3.0 Receive Policy Renewal Pack
Accredited Employer Team Financial Analyst

a Receive the completed Policy Renewal pack from the Accredited Employer.

> **NOTE** **What if you don't receive the Policy Renewal pack by 1st March?**
> Go to Lapse Accredited Employer Programme (AEP) Policy Offer process.
> ▸ **PROCESS** Lapse Accredited Employer Programme (AEP) Policy Offer

b Update the Tracker workbook with the date received and any relevant information.

c Add an Interaction in Juno_CRM to advise the documentation has been received.

▸ **PROCESS** **Accept Accredited Employers Programme (AEP) Policy Offer**
Accredited Employer Team Financial Analyst, Accredited Employer Team Operations Coordinator, Accredited Employer Team Operations Manager, Manager - Business Customer Operations