

## BENEFIT RESOURCE (BRI)

# EDI Enrollment Tips

It is preferred that we receive OE files 30 days in advance of the start of the plan year to allow for the greatest chance that new participants will receive their cards before the plan year begins. When possible, all OE files should be sent with the naming convention `YYYYMMDD_HHMMSS_OpenEnrollment_companycode.csv` for files coming from the third-party enrollment software. That will identify those open enrollment records from the existing continuous feed and will draw attention that your open enrollment participant information has been received by BRI.

**Make sure the participant data being sent by the third-party feed is accurate**, starting with the participant's Member ID. Check to ensure that the Member IDs being sent are the same that are currently being used by plan participants, whether that is SSN or an alternate Member ID. Sending the incorrect Member IDs at open enrollment can result in complex data issues and can result in card issuance problems too.

**To further ensure accuracy, participant demographic information, plan types and election amounts should all be checked within the third-party enrollment software, before it is transmitted to BRI.** All election effective dates on the file should be for the start of the new plan year and the file should not contain any termination records. Prior plan year elections, which are not to be included on the OE file, automatically do not extend into the new plan year and should not be sent to BRI as closed or terminated.

Some third-party file feeds require the employer to notify BRI when the open enrollment period has closed. This is referred to as a 'soft close' date. **If the employer does not notify BRI that the 'soft close' date has passed and to pull the open enrollment information, the data will remain within the third-party enrollment software and will not be transmitted to BRI until the 'hard close' date**, which is usually during the first week after the new plan year has already started. This will result in participant account set up and new participant card issuance to be received late, after the start of the new plan year. Check with your third-party file vendor to see if 'soft or hard close' dates are applicable.