

Multiyear Setup How-to Guide

- Selerix Support recommends the following as a “best practice” when working with multi-plan year cases:
To set up a case using multi-plan years:

1. Select **New Case** from the **Case Setup** menu.
The **Create New Case** screen displays options

Create New Case

EXAMPLE

Step 1

Please choose from the following options to create your new case.

Which option should I choose?

BenefitAgent Interview
 duplicate of: 2014 National Health II (TRAINING)
 from file
 from scratch

When creating a case as a duplicate of another case, you can choose to create the case as an exact copy, make the copy be marked as "Training", or even change the enrollment period, plan year, effective date, and other advanced options.

Case Name Copy of 2014 National Health II (TRAINING)

Create as Training Copy of case
 Change Enrollment Period, Plan Year, and Effective Date for all Plans/Rate Groups
 Advanced Options

2. Select **duplicate of** and the **case name**. This should be pre-filled with your current case name.
3. Click the option **Change Enrollment Period, Plan Year, and Effective Date for all Plans/Rate Groups**. This allows you to set the designated plan year for the benefit plans.
4. Set the effective date for the designated plan year.
5. Click **Finish**. The case copy is created with the designated plan year.
6. In the new case, update benefit plans as needed, including rates, eligibility, enrollment rules, dates and more, as applicable for the designated plan year.
7. Select **Case Info** from the **Case Setup** menu, and then click the **Plan Year** tab.
8. Import the next plan year case into the newly created case (for example, import the 09/01/2021 case into the 09/01/2020 case).