

# Change Active Employee to Retiree

## 1. Bring up Employee in enrollment management

The screenshot shows the OEBB Enrollment Management interface. On the left is a navigation menu with options like System Codes, Address Setup, Contact Setup, Security Setup, Plan Management, Contact Management, Enrollment Management, Enrollment Requests, and Member Management. The main area is titled 'Enrollments' and contains a 'Quick Search' bar with fields for ID, Last Name, and First Name. Below the search bar are buttons for 'Reset', 'Active', 'History', 'History Detail', and 'OE History'. A row of buttons includes 'E-Benefit Summary', 'Benefit Summary', 'Member IDs', 'Member Info', 'Dependents', 'Case Notes', 'Other Group Cov.', and 'Employment', with the 'Employment' button circled in red. Below this is a 'Summary for employee of Salem-Keizer SD 24J (Current)' table.

Plan Type/Plan Name	Coverage Tier	Enr Type	Cov. Eff. Date	End Date	Dependents
<b>Medical</b> Kaiser Medical Plan 2 - Composite	Employee & Spouse	Q	02/01/2015		Joe ✓
<b>Vision</b> Kaiser Vision Plan 5 - Composite	Employee & Spouse	Q	02/01/2015		✓
<b>Dental</b> Kaiser Dental Plan 8/Ortho - Composite	Employee & Spouse	Q	02/01/2015		✓

## 2. Click on Employment button as shown above.

The screenshot shows the OEBB Employment interface for member Jane Doe. It features a table with columns: Institution Number, Employment Type, Member Type, Transaction, Emp Type/Mem Type Termination Reason Type, and Termination. The 'Institution Number' column has the value '2142' circled in red. Below the table are 'Add' and 'Back to Enrollments' buttons.

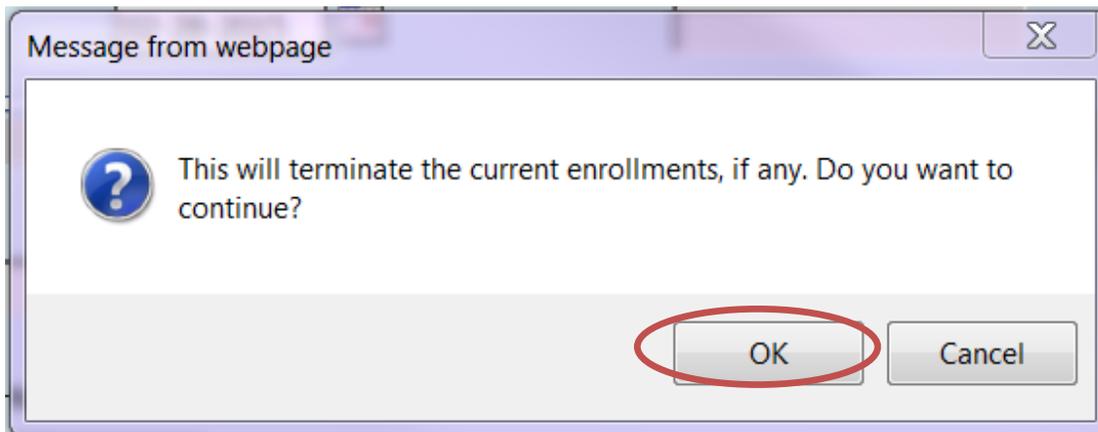
Institution Number	Employment Type	Member Type	Transaction	Emp Type/Mem Type Termination Reason Type	Termination
2142	Administrator Licensed-Full Time	Non Represented - Salem-Keizer	09-08-2014		

## 3. Click on the Institution Number as shown above.

The screenshot shows the OEBB Employment details interface for member Jane Doe. It includes sections for 'Educational Entity' (Name: Salem-Keizer SD 24J, Institution Number: 2142), 'Types' (Member: Non Represented - Salem-Keizer, Employment: Administrator Licensed-Full Time), and 'Dates' (Original Hire: 09-08-2014, Emp/Mem Type Change: 09-08-2014, Termination, Benefits Paid Through). At the bottom, there are buttons for 'Save', 'Delete', 'Search', 'Reset', 'Back to Enrollments', 'Change Employment' (circled in red), and 'Salary'.

## 4. Click on the Change Employment button as shown above.

5. Change the Member Type and the Employment type as shown above. Click on Emp Type/Mem type Change Date (this is the date “Active “employment is changed). Enter the date you want the active benefits to end in the “Coverage End Date for Previous Employment” Box. Click Save



6. Verify the Coverage End Date is the date that you want the “Active” benefits to end. If correct, click OK. This will take you back to the Employment Page. Click “Back to Enrollments”.

7. Benefits will end and a QSC is already created as shown above. Click on Medical.

8. Select the plan and check the dependents that are to be covered. Click Accept & Continue then click the Back button. Continue this for remaining plans and any of the optional benefits links to make the enrollment selections.

**OEBCB**  
BENEFIT BOARD

**Enrollments**  
Record Saved Successfully

**Quick Search**  
ID: E00272329    Last Name: Doe    First Name: Jane

Reset    Active    History    History Detail    OE History

E-Benefit Summary    Benefit Summary    Member IDs    Member Info    Dependents    Case Notes    Other Group Cov.    Employment

QSC Events    Reinstate All    Term All    Beneficiaries    Healthy Futures    Basic Flag - Dental    Basic Flag - Vision

**Summary for employee of Salem-Keizer SD 24J (Current)**

Plan Type/Plan Name	Coverage Tier	Enr Type	Cov. Eff. Date	End Date	Dependents
<b>Medical</b> Kaiser Medical Plan 2 - Tiered/Retiree	Retiree & Spouse	Q	03/01/2015		Joe ✓
<b>Vision</b> Kaiser Vision Plan 5 - Tiered/Retiree	Retiree & Spouse	Q	03/01/2015		Joe ✓
<b>Dental</b> Kaiser Dental Plan 8/Ortho - Tiered/Retiree	Retiree & Spouse	Q	03/01/2015		Joe ✓
<b>Optional Employee Life</b> <b>Declined</b>			<b>10/01/2014</b>		
<b>Optional Spouse/Partner Life</b> <b>Declined</b>			<b>10/01/2014</b>		
<b>Optional Employee Accidental</b>					

9. Click Save once you have completed the enrollments. You will see “Record Saved Successfully”.

10. You are now done.