

CHECKLIST · FILLABLE

Multi-Carrier Data Reconciliation Checklist

Get your data right across every carrier before you open the window.

For administrators

Complete this for each carrier on your plan before re-enrollment opens. The goal is simple: every carrier should agree with your records, and with each other, on who is covered and for what.

Plan: _____ Prepared by: _____ Date: _____

Carriers on this plan: _____

MEMBERSHIP

- ☐ Active member list matches your records (headcount and names)
- ☐ New hires from the past year are all enrolled
- ☐ Terminations from the past year are all removed
- ☐ Members on leave are correctly flagged and coded
- ☐ Retirees or other special-status members are handled correctly

DEPENDENTS

- ☐ Dependent lists match your records
- ☐ Overage dependents have current student or disability confirmation on file
- ☐ Dependents added or removed during the year are reflected

COVERAGE

- ☐ Each member's benefit selections match your records
- ☐ Coverage amounts are correct (including salary-based amounts)
- ☐ Any coverage above the non-evidence maximum is flagged, with EOI status noted
- ☐ Class or division assignments are correct

CROSS-CARRIER CONSISTENCY

- ☐ The same member's status agrees across all carriers
- ☐ The same dependent information agrees across all carriers
- ☐ A change made during the year reached every carrier it should have

Discrepancy log

Record anything that does not match, and resolve before the window opens.

Member / item	Carrier	Discrepancy	Action	Resolved
				Y / N
				Y / N
				Y / N

☐ Data reconciled across all carriers

By: _____ Date: _____