

# Employer Renewal Date Change and Plan Year Verification Form

(For transitional relief states and plans ONLY)

This form is to be used by a UnitedHealthcare fully insured group policyholder to request a change in their policy renewal date and to verify Plan Year \*.

## Part I: Customer Request to Change Renewal Date

This form provides notice to UnitedHealthcare of group health plan's intent to renew its existing group coverage prior to the normal renewal date.

UnitedHealthcare and the group health plan will have all the same rights and obligations on the early renewal date noted below as with any other renewal.

I understand that if the subscriber or family deductibles under my coverage accumulate on a non-calendar basis, that any such amounts will be forfeited on the date of policy year/renewal date change, absent an express carry-forward provision in the policy. **This does not apply to calendar year plans (deductibles that run January 1<sup>st</sup> – December 31<sup>st</sup>).**

Yes, I want to change my renewal anniversary date to: \_\_\_\_\_

## Part II: Verification of Plan Year

ERISA group health plans may select any twelve (12) month period of time as their plan year. If the plan year anniversary date differs from your renewal anniversary date this must be set forth in your group's plan documents.

Many health care reform provisions apply to group health plans as of the first day of a plan year. If your policy year and plan are not aligned, changes may be required mid-policy year to comply with applicable laws.

In order to ensure that we will be administering your Plan appropriately after renewal date change, we need you to verify your ERISA plan year for the period after renewal date change requested in Part I.

Is your current ERISA plan year changing? \*\* Yes [ ] No [ ]

Signature of group policy holder \_\_\_\_\_ Date \_\_\_\_\_

Group health plan name \_\_\_\_\_ Customer # \_\_\_\_\_



\*Plan Year is the twelve consecutive month period of time under which the Plan is maintained and is determined by reference to your plan document.

\*\*For employer groups with 50 or more full-time employees, including full-time equivalents (IRC counting methodology for the relevant counting period) a change to Plan Year to a later calendar date may not comply with all IRS requirements for employer shared responsibility "transitional relief" and 'safe harbor' requirements, which may result employer shared responsibility provisions applying on an accelerated basis. Employer groups should consult their legal counsel or tax advisor for more information on impact of any changes.