



2025

Eligibility Management Checklist

KeenlyBenefits.com

Stay in
compliance,
reduce risk.



01. Review plan documents for eligibility rules (including dependents and QLEs)
02. Train HR and managers on eligibility timelines and reporting requirements
03. Educate employees on their responsibility to report Qualifying Life Events (QLEs)
04. Establish a documented process for QLE notifications and changes
05. Audit current enrollment to confirm all dependents meet eligibility criteria
06. Set reminders for dependent age-offs (e.g., children turning 26)
07. Review divorce decrees against plan eligibility rules
08. Track employee classification changes (e.g., PT to FT) that impact eligibility
09. Verify term dates are accurately recorded for benefit terminations
10. Schedule regular dependent eligibility audits (quarterly or annually)
11. Review stop-loss contracts for language around eligibility and reimbursement
12. Establish a policy on retroactive additions/removals and document exceptions
13. Partner with your TPA or benefits advisor to confirm compliance and risk exposure
14. Communicate with employees during open enrollment about eligibility rules
15. Create a feedback loop to flag and correct issues as they arise