

# Client Configuration Change Request

This form should be used for any client plan configuration changes made outside of plan implementation or renewal. All client configuration changes must be approved by Mercer Marketplace. The processing time of these changes may vary based on the types of request and integration elements involved.

Some plan configuration changes may cause potential downstream impact. To ensure a successful client configuration change, acknowledgement of the change and its potential impact is required via either client signature or conference call for changes found in Section I. A client signature is not required for Section 2 changes. Please review the Downstream Impact section of this form to review potential risks.

Please complete and return the Request Form, including any necessary signatures/conference call dates.

\*=Required Fields

### \*Step 1: Company Information

\*Company Name

\*Tax ID Number or Company Code

### \*Step 2: Change Request Type (Refer to second page for required documents and request specific instructions):

| Plan/Rate Change                | Division                      | Product ID Change | Other |
|---------------------------------|-------------------------------|-------------------|-------|
| COBRA Rate Change               | COBRA Category Code Change    |                   |       |
| COBRA Plan Name Change          | Benefits Category Code Change |                   |       |
| Benefits Grace Period Change    |                               |                   |       |
| Benefits Run-out Period Change  |                               |                   |       |
| Benefits \$550 Carryover Change |                               |                   |       |

\*Change Details (Please indicate what change needs to be done in below field. )

### \*Step 3: Signatures (A signature from the Authorized Approver List is required.)

I understand the requested changes are considered final by Mercer Marketplace and consent that these changes have gone through the appropriate approval and validation steps. Additionally, downstream impact and potential risk is understood and acknowledged by the client.

Mercer Marketplace Authorized Approver Signature

Date

Employer Signature

Date

Client Call (Check here if the client call with WEX has been held.)

Date of Call

# Client Configuration Change Request (continued)

## Downstream Impact/Potential Risk

### Section 1: Client Signature or Client Conference Call Required

#### COBRA Rate Change/ COBRA Plan Name Change

(Please attach Mercer Marketplace COBRA rate spreadsheet to this form.)

**Downstream impact:** Once the update is complete, notices and coupons will generate to affected members. For retroactive rate changes, in order for ACH auto-payments to resume, manual payment is required to pay current. Failure to do so may result in coverage termination.

#### Benefits Grace Period Change / Benefits Run-out Period Change / Benefits \$550 Carryover Change

(Please attach updated Benefits Design Guide to this form for grace period or run-out changes.)

**Downstream impact:** Any grace period/run-out change may impact participants' ability to submit claims or future eligibility in an HSA. Plan documents need to be updated and distributed to the members by the client. There's a potential risk of member confusion based on historical call center education.

#### COBRA Category Code Change/ Benefits Category Code Change

(Please attach updated Mercer Marketplace Plan Requirement Document to this form.)

**Downstream impact:** Category codes must align between WEX and enrollment system in order to avoid potential file errors or incorrect category assignment. Misaligned categories or timing delays between systems may lead to risk of incorrect funding and reporting.

#### Other Change

(Please provide any supporting documents for this change.)

**Downstream impact:** WEX will review each request on a case-by-case basis and provide any necessary downstream impact with the client for the unique request.

### Section 2: No Client Signature Required

#### Product ID Change

**Downstream impact:** Product IDs must align between WEX and the enrollment system to avoid potential file errors. Misaligned product IDs or timing delays between systems may lead to a lack of COBRA coverage at carrier and member escalation.