

Sharing information about open enrollment and available benefits in advance helps employees compare the value of their current perks and benefits with the idea of seeking a new job.

Giving employees more time to understand their benefits is crucial to employee retention and contentment.

Open enrollment doesn't have to be a stressful administrative task. When planned well in advance, it becomes a valuable opportunity to review and enhance your benefits offerings, demonstrating your commitment to your team's physical, mental, and financial well-being. A well-executed open enrollment can boost employee morale, improve retention, and ensure your workforce is supported.

Use this checklist to guide your organization through a successful open enrollment period, from the initial planning stages to the final follow-up.

Phase 1: Plan and Prepare Early (8-12 Weeks Before)

- **Leverage Technology:** Consider a benefits portal where employees can easily access health plan documents such as benefit summaries, plan flyers, and contributions charts.
- **Gather Employee Feedback:** Solicit and record employee questions, concerns, and suggestions from the previous year. Consider conducting a survey to understand what benefits or improvements your workforce desires for the upcoming year.
- **Evaluate and Enhance Offerings:** Identify new or updated enrollment options.
- **Develop Core Resources:** Begin preparing your benefits guide and consider implementing or updating online enrollment tools and software.
- **Create Educational Content:** Produce digital educational materials like FAQs and videos.

Phase 2: Communication Kick-Off (4 Weeks Before)

- **Launch Communication Campaign:** Start sharing enrollment information across all selected online platforms (e.g., intranet, company newsletter, email).
- **Equip Management:** Develop a resource kit for your management team, including talking points and FAQs, to ensure they can confidently discuss open enrollment with their teams.
- **Integrate Reminders:** Add open enrollment reminders and key dates to the email signatures of your management team.

Phase 3: The Final Countdown (1-2 Weeks Before)

- **Host Informational Sessions:** Schedule and host virtual benefits meetings, webinars, and one-on-one sessions as needed to answer specific questions.
- **Distribute Physical Materials:** Provide informational pamphlets and mailers to employees.
- **Prepare for Questions:** Have answers ready for FAQs to ensure a smooth process.

Phase 4: During Open Enrollment

- **Ensure Full Distribution:** Make sure every employee receives the following information:



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- **Ensure Full Distribution:** Make sure every employee receives the following information:
 - The open enrollment timeline and deadlines
 - A statement of their current coverage
 - Information on plan-specific changes and rates
 - Summaries of available plans
 - The open enrollment booklet and any necessary forms
 - Contact details for all plan carriers
- **Promote Discussion:** Remind managers to actively discuss benefit options with their teams.
- **Provide Support:** Offer ample time for enrollment and send frequent reminders throughout the period.
- **Last-Minute Reminder:** Schedule a company-wide reminder for the day before the enrollment deadline to prevent employees from missing the window.

Phase 5: Post-Enrollment Actions (1-2 Weeks After)

- **Audit and Submit:** Review all enrollment forms for missing or incorrect information.
- **Ensure Compliance:** Confirm that all relevant health care reform requirements have been met.
- **Follow Up:** Collect feedback from employees on their open enrollment experience.

We are here to help; reach out to us with any open enrollment questions or needs you may have!