

# Annual Open Enrollment Checklist

Consider the following to help you prepare for a successful open enrollment season.

## Pre-enrollment Period

### Plan ahead:

- Be ready to answer employee questions regarding health care reform legislation. Understand how the legislation affects your benefits offerings and be prepared to share this knowledge with employees
- Streamline open enrollment with Workforce Ready's HRIS Solution. Set up, configure, modify, and manage multiple benefit plan types and gain on-demand visibility into eligibility, enrollment status, and costs across the employee base.
- Maintain records of employee questions, comments and concerns, preferred communication methods, trends in employees' selections and other information that will help you better serve employees during open enrollment.
- Make necessary changes to your benefits offerings before the open enrollment period to avoid rushing at the last minute.
- Survey employees on what they are seeking in terms of benefits offerings and any improvements they would like to see. Customize your offerings to your employee population after analyzing survey results.
- Consider offering new benefits, even if they are 100 percent voluntary.

### Spread the knowledge:

- Hold meetings with employees to review coverage options and changes. Offer information regarding benefits in various formats to your employees such as one-on-one meetings, benefit fairs, mailers or intranet tools.
- If pamphlets or brochures are provided by your carrier or third-party administrator, make them available to your employees.
- Communicate helpful phone numbers and websites to employees looking for additional resources.

### Know your audience:

- Create a FAQ sheet with answers to distribute, post or email to employees.

## Enrollment Period

### Make sure employees have received all of the following materials, including:

- Open enrollment schedule
- Statement of current coverage
- Plan-specific changes and rates
- Plan-specific summaries
- Open enrollment booklet and forms
- Deadline for open enrollment
- Resource contact information

### Guide your employees through this period:

- Provide employees with materials and give them time to review them.
- Offer generous deadlines, with frequent reminders.
- Send a reminder the day before the enrollment deadline
- Remain available through various mediums for employees to contact with questions and clarification.
- Make sure employees understand that you are available to answer any questions, and that no question is too simple or complex.

### Post-enrollment Period

#### Did you...

- Remain available through various mediums for employees to contact with questions and clarification.
- Check enrollment forms for any information that was incorrectly filled out.
- Submit all enrollment forms to carrier?
- Ensure that you are in compliance with any health care reform provisions that affect your plan and
- Follow up to ensure all employees received their ID cards?
- Make sure all employees are clear about their benefits and don't have any out standing questions?

### Throughout the Year

- Consider offering ongoing employee education throughout the year. Doing so will allow employees a chance to gain a deeper understanding of their benefits options outside of the hectic open enrollment season, so they're better prepared next year.