

# Checklist for Success

## OPEN ENROLLMENT

- Notify employees about the open enrollment period well in advance.
- Prepare and distribute written communications about open enrollment, including deadlines, plan changes, and available options.
- Update and distribute any plan documents or summaries.
- Provide employees with clear information about each plan option, including costs, benefits, and network providers.
- Offer decision-making tools, such as online calculators or comparison charts, to help employees evaluate plan options.
- Host informational sessions or webinars to provide employees with more detailed information about plan options.
- Ensure that employees have access to a broker or plan administrator who can answer any questions or concerns.
- Verify that all eligible employees have been offered coverage and provided with enrollment materials.
- Ensure that all employee contributions, premiums, and deductions are accurately reflected in payroll records.
- Verify that the employer contribution is accurately reflected in the plan's billing records.
- Confirm that all employee data, including names, addresses, and dependents, are accurate and up-to-date.
- Confirm that all plan documents and disclosures have been distributed to employees as required.
- Monitor enrollment activity and follow up with any employees who have not enrolled.
- Remind employees about any additional benefits, such as wellness programs or employee assistance programs, that are available to them.
- Evaluate the success of the open enrollment process and make any necessary adjustments for the next enrollment period.