

Open Enrollment Tasks Checklist

Before Open Enrollment

- Gather Your Information
 - Next Year's Pricing from Insurance Partner
 - Employee Data and Demographics
 - Budget Decided on by Company Leader
 - Last Year's Retrospective
- Negotiate With Your Current Provider, Or...
- Get Bids from Other Providers, if Necessary
- Choose Active Enrollment or Passive Enrollment
- Prepare Resources to Answer Employees' Questions
- Test Enrollment Systems Well Before Rollout
- Hold Company Meetings

During Open Enrollment

- Communicate, Communicate, Communicate
- Open Your Door
- Roll Out Other New Benefits
- Prioritize Your Own Wellness

After Open Enrollment

- Double Check Every Detail & Correct Those Errors
- Survey Your Workforce
- Craft a New Retrospective
- Continue Employee Engagement Efforts

During the Off-Season

- Communicate to Educate
- Continue Learning
 - Research Laws, Regulations in the Pipeline
 - Discover New Technology Aids
- Take Your Vacation Days
- Research Wellness Programs and Other Lifestyle Benefits
- Clear Your Plate