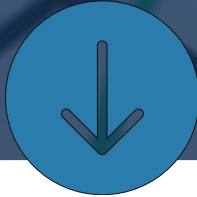


It's About That Time: Your 2023 Open Enrollment Checklist



Summer is officially over, and for benefits teams across the country, this means open enrollment is right around the corner. **Use this checklist to help you gather the essential items you'll need to make sure open enrollment goes off without a hitch.**

- Review survey results from last year's open enrollment** to ensure what you're doing aligns with your employee population's preferences and expectations.
- Have any updated Carrier information, such as rate changes or new carriers you're working with, available for third-party administrators and vendors** you work with for open enrollment.
- Review your Section 125 plan document** and make any updates regarding plan benefits, member eligibility, name changes, and new vendors. (If you're not sure what a plan document is or how to make it compliant, reach out to your broker for help understanding these nuances.)
- Update your Summary of Benefits and Coverage (SBC) & Summary Plan Description (SPD) documents** – a requirement by law.
- Prepare other compliance documents and notices for distribution**, such as HIPAA special enrollment rights, Medicare Part D notice of creditable/non-creditable status, patient protections notice, HIPAA privacy notice, and more.
- Make sure that the online systems you use for open enrollment are up to date** and that you're using the most effective tools for your employee population.
- Communicate enrollment information with brochures, posters, postcards, and fliers** distributed in common areas.

- Consider offering employees decision-making tools** that can help them choose the right benefits for them by comparing plans, estimating costs, and calculating tax benefits.
- Put together webinars and/or presentations for employees** explaining their benefit options, new plan information, and important deadlines.
- Prepare an FAQ resource** by anticipating common benefits questions and previous employee concerns.
- Schedule time for information sessions**, both online and in person, for people to ask questions about open enrollment.
- Have training materials ready for temporary help** during open enrollment and keep employment agreements on file.
- Prepare a post open enrollment survey** to help you get concrete feedback about what worked and didn't work, so you can adjust for next year's open enrollment.

Open enrollment is comprised of many moving parts, and there are a lot of assets you'll need to keep track of as you communicate with employees, coordinate with carriers, and collaborate with vendors.

Our experienced benefits team is here to help you navigate the ins and outs of open enrollment. [Connect with us today](#) to learn more about how we can work together.

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