Open Enrollment Communication Checklist

For benefits brokers and account managers · Plan, prepare and send every enrollment message in the right order

1. BEFORE ENROLLMENT OPENS — CONFIRM & PREPARE

- [ ] Plan changes, contributions and enrollment dates confirmed with the employer
- [ ] Enrollment platform or link confirmed and tested
- [ ] List of materials agreed, with one approver for each piece
- [ ] Final carrier summaries, rates and contacts collected in one package
- [ ] Benefits guide built first; flyer, deck and emails reuse its content
- [ ] All numbers checked for the new plan year (no carried-over rates or limits)
- [ ] No personal or health information in the guide or design files

2. BENEFITS GUIDE — CORE SECTIONS

- [ ] Cover with employer name and plan year
- [ ] Welcome and “what’s new” page
- [ ] Eligibility and enrollment steps
- [ ] Qualifying life events
- [ ] Medical plan comparison (same rows, same order)
- [ ] Employee cost per paycheck by tier
- [ ] HSA / FSA / HRA details for this year
- [ ] Dental and vision in the medical layout
- [ ] Life, disability and voluntary benefits
- [ ] Where to go for care
- [ ] Contacts: carriers, group numbers, HR/broker
- [ ] Required notices, or where to find them

3. ANNOUNCEMENT — TELL EMPLOYEES WHAT IS COMING

- [ ] Announcement email: dates + the one or two changes that matter most
- [ ] Announcement flyer or poster: dates headline, what’s new, one action, one contact
- [ ] QR code to the guide or enrollment platform on printed pieces
- [ ] Meeting or webinar invitations (if the group holds them)

4. WHILE ENROLLMENT IS OPEN — SUPPORT DECISIONS

- [ ] Benefits guide shared on day one (PDF, plus print where needed)
- [ ] Enrollment presentation run live or recorded
- [ ] Mid-window reminder with a single clear action
- [ ] Final reminder in the last 2–3 days with the deadline
- [ ] Printed or in-person option for employees without regular email access

5. AFTER ENROLLMENT CLOSES — CONFIRM & LEARN

- [ ] Employees asked to review their confirmation of elections
- [ ] Most common HR questions noted for next year’s guide
- [ ] Final editable source files saved for next year’s update

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