

# CHECKLIST | POST-OPEN ENROLLMENT



**An organization’s post-open enrollment activities can be just as important as the tasks that must be completed leading up to and during open enrollment.** After wrapping up open enrollment, there are many benefits-related responsibilities employers must address before the start of the new year, and there are others that can be completed after the year’s end but before the beginning of next year’s open enrollment season. **The post-open enrollment period can allow employers to gather valuable information, including feedback and analyses, that can be used to improve next year’s open enrollment process.** This checklist can assist organizations in developing effective post-enrollment practices and ensure the post-open enrollment period is fully utilized.

Tasks to Complete After Open Enrollment	Completed	N/A
Verify employees have completed their enrollment forms.	<input type="checkbox"/>	<input type="checkbox"/>
Review employee enrollment forms and information for errors.	<input type="checkbox"/>	<input type="checkbox"/>
Submit enrollment forms and information to insurance carriers, where applicable.	<input type="checkbox"/>	<input type="checkbox"/>
Confirm that the organization and/or carriers have copied and transferred all employee enrollment and election information correctly.	<input type="checkbox"/>	<input type="checkbox"/>
Update payroll to reflect any changes to employees’ deductions based on employee benefits changes, such as new plans or premiums.	<input type="checkbox"/>	<input type="checkbox"/>
Provide employees with steps for accessing their benefits.	<input type="checkbox"/>	<input type="checkbox"/>
Ensure employees understand the details of their health care coverage and benefits.	<input type="checkbox"/>	<input type="checkbox"/>
Provide employees with opportunities to ask questions about their health care coverage and benefits.	<input type="checkbox"/>	<input type="checkbox"/>
Confirm employees received their new ID cards.	<input type="checkbox"/>	<input type="checkbox"/>
Make certain all proper notices, such as Summary Plan Descriptions and Summaries of Benefits and Coverage, have been or will be distributed	<input type="checkbox"/>	<input type="checkbox"/>
Ensure compliance with any new laws, regulations or provisions affecting employee benefits plan and/or employees.	<input type="checkbox"/>	<input type="checkbox"/>
Audit billing invoices for insurance carriers and payroll deductions for accuracy and correct any errors, if necessary.	<input type="checkbox"/>	<input type="checkbox"/>

*This checklist is merely a guideline. It is neither meant to be exhaustive nor meant to be construed as legal advice. It does not address all potential compliance issues with federal, state or local standards. Consult your licensed representative at BenePro or legal counsel to address possible compliance requirements. © 2022 Zywave, Inc. All rights reserved.*

Tasks to Prepare for Next Year	Completed	N/A
Conduct employee surveys and collect feedback regarding employees' open enrollment experience.	<input type="checkbox"/>	<input type="checkbox"/>
Review employee engagement with open enrollment communications and materials, such as emails, guides and meetings.	<input type="checkbox"/>	<input type="checkbox"/>
Analyze all open enrollment data and employee feedback.	<input type="checkbox"/>	<input type="checkbox"/>
Identify any changes or areas of improvement for next year's open enrollment.	<input type="checkbox"/>	<input type="checkbox"/>
Schedule a meeting with the organization's employee benefits broker to review the recently completed open enrollment process and discuss any changes or areas for improvement.	<input type="checkbox"/>	<input type="checkbox"/>
Establish quarterly meetings with the organization's benefits broker to stay apprised of employee benefits trends and utilization.	<input type="checkbox"/>	<input type="checkbox"/>
Create a plan for implementing any changes or improvements to next year's open enrollment.	<input type="checkbox"/>	<input type="checkbox"/>
Develop an employee benefits administration plan for the year to address any changes that may occur during the year, such as new enrollments, qualifying life events and employee terminations.	<input type="checkbox"/>	<input type="checkbox"/>
Implement an employee benefits communications plan that provides employees with year-round information and education regarding employee benefits to aid employees in making better care decisions and improve employee engagement.	<input type="checkbox"/>	<input type="checkbox"/>
Identify benefits trends and determine whether to make any changes to the organization's employee benefit plan options and offerings for next year's open enrollment.	<input type="checkbox"/>	<input type="checkbox"/>
Examine and stay informed of any health care regulations and reforms that may impact the organization's employee benefits plan to ensure compliance.	<input type="checkbox"/>	<input type="checkbox"/>

The post-open enrollment period is a critical time for organizations to review their open enrollment process and identify areas for improvement. It also gives employers an opportunity to develop and establish employee benefits strategies for next year. **By establishing post-open enrollment processes, employers can ensure they are prepared for next year's open enrollment season and help employees get the most out of their benefits.**

For more open enrollment resources, contact [BenePro](#) today.