

Open enrollment checklist

An employer worksheet | Plan year: _____ | Owner: _____

01 / PREPARE

- ☐ Confirm final rates, plan documents, eligibility rules and effective dates.
- ☐ Set opening, closing and correction dates around carrier processing deadlines.
- ☐ Reconcile the census, dependent information and payroll contributions.
- ☐ Approve a side-by-side explanation of plan choices and changes.

02 / ENROLL

- ☐ Share the enrollment link, deadlines and cost per paycheck with employees.
- ☐ Identify a contact for plan, provider and eligibility questions.
- ☐ Track incomplete elections and follow up before the deadline.
- ☐ Record corrections for both the carrier and payroll team.

03 / RECONCILE

- ☐ Match final elections to carrier acknowledgments and payroll deductions.
- ☐ Spot-check effective dates, dependents and employee-only/family tiers.
- ☐ Keep a dated list of discrepancies and the owner resolving each one.

04 / FIRST DAY OF COVERAGE

- ☐ Confirm a contact for urgent coverage access and missing ID cards.
- ☐ Track first-fill pharmacy and provider eligibility issues until resolved.
- ☐ Save the final communication and reconciliation records for next year.