ADAPTING YOUR OPEN ENROLLMENT TO TODAY'S WORKFORCE

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TODAY

AGENDA:

- Schedule and Prep
- Configuration
- Communication and Reports
- Testing and Practicing

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Q&A

Feel free to ask questions during the session or use the Q&A icon in the bottom of your screen to submit them

Slides and webinar recording will be shared following our session today.

PART 1:
SCHEDULE & PREP

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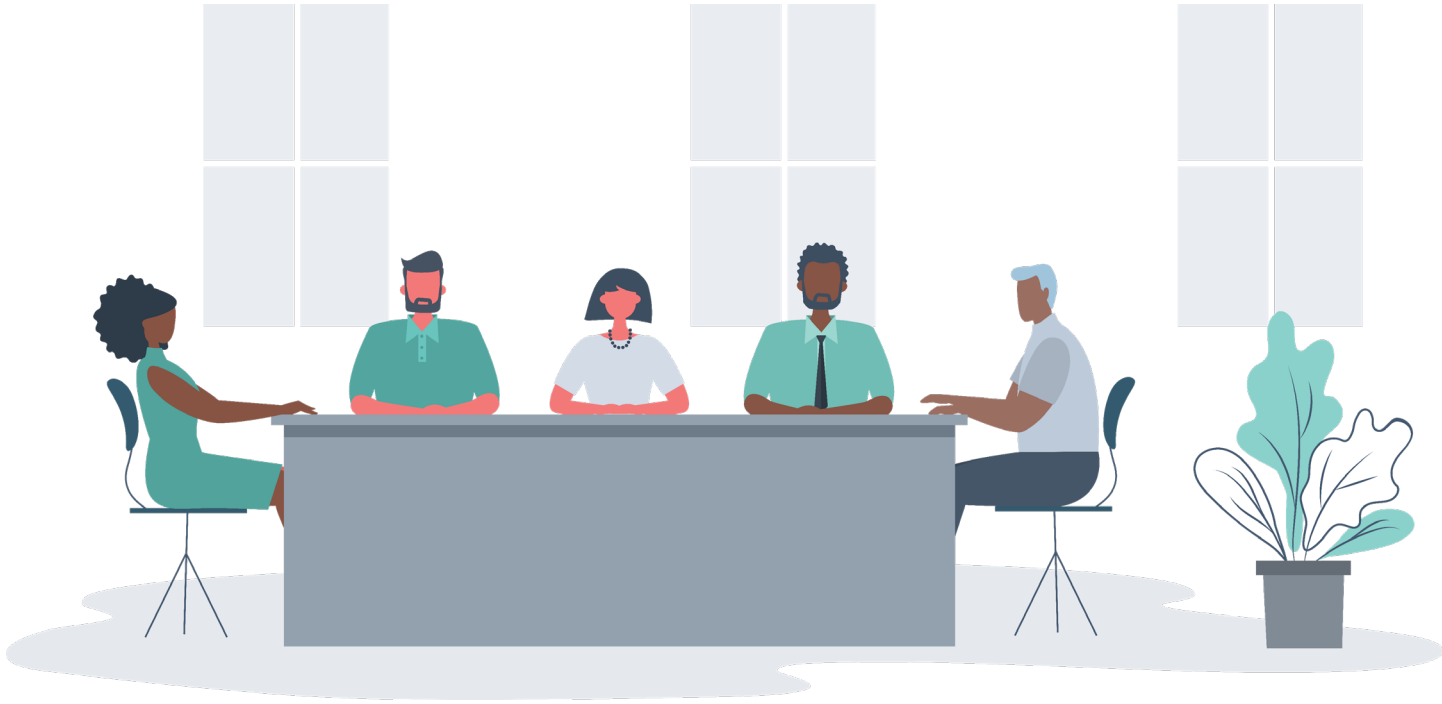
TEAM & SCHEDULE

Team Should Include:

- System Admin
- Benefits Admin
- Payroll Admin
- Testers
- Presenter(s)
- Expert



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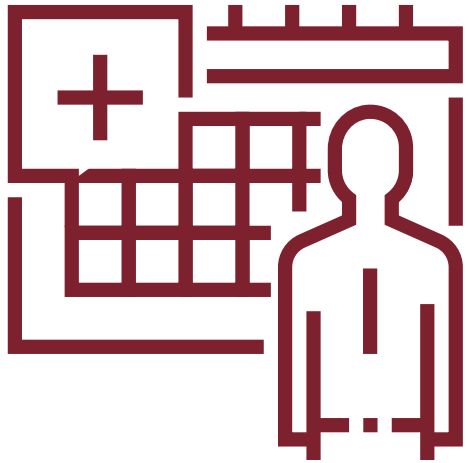
SCHEDULE

Consider:

- Vendor File Feeds
- Team Schedule
- Off Cycle Open Enrollment



Also Consider:

- Multiple Presentations
- Get on Calendars Early
- Video Conferencing Tools

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TOOLKIT

Open Enrollment Rollout Toolkit:

- Open Enrollment Timeline
- Open Enrollment Checklist
- Top Tips
- Using Effective Data Worksheet

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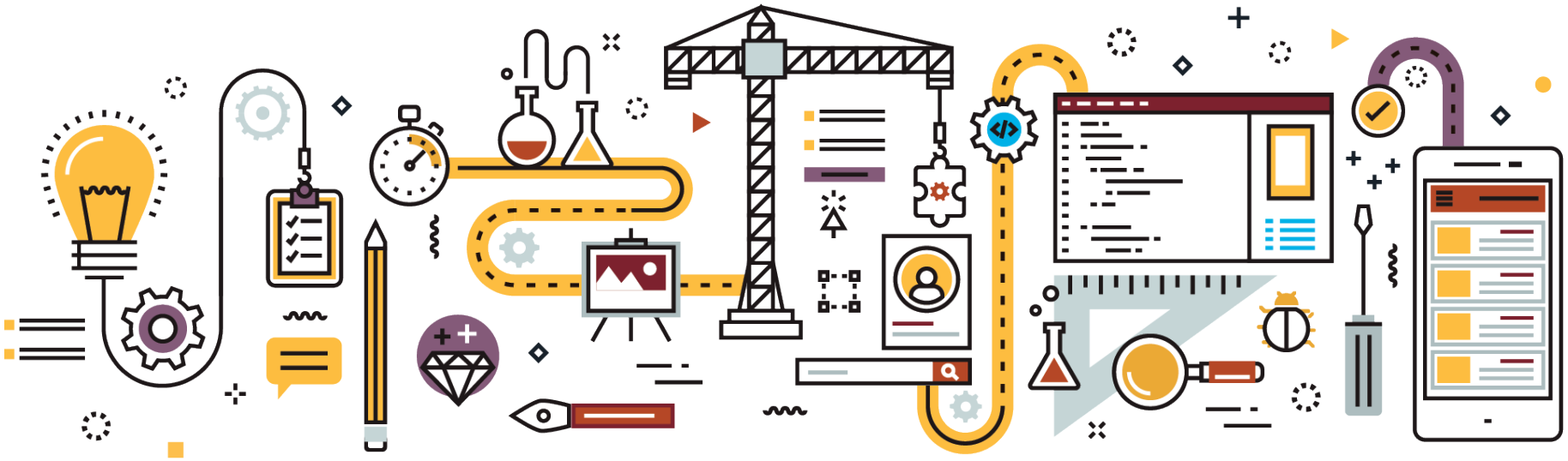
PART 2: CONFIGURATION



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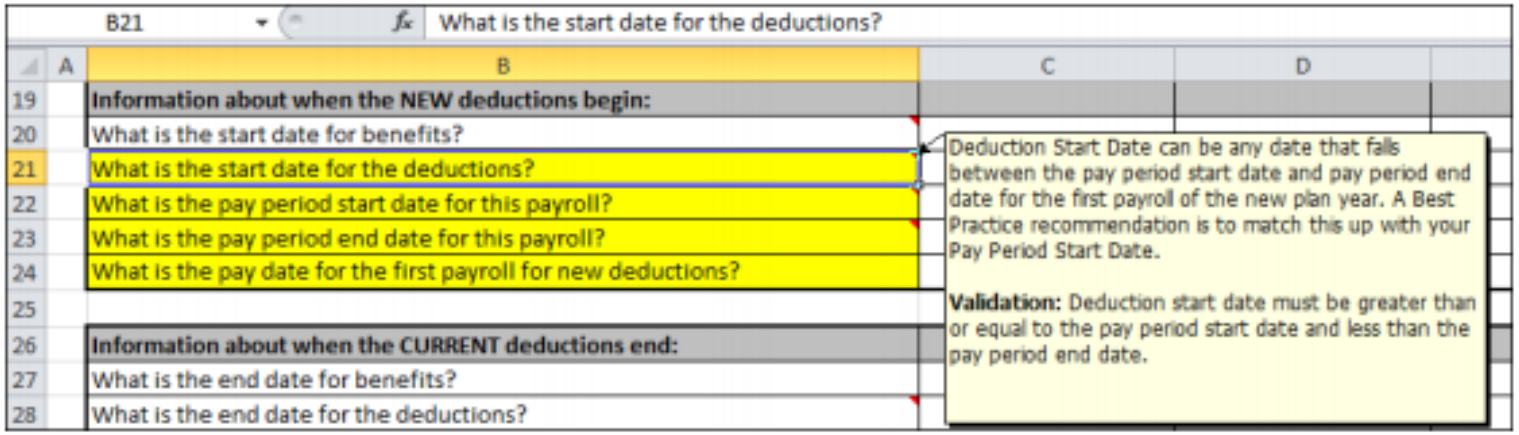
CONFIGURATION

Business Rules that affect Open Enrollment:

- Deduction/Benefit Groups
- Deductions/Benefit Type
- Deduction/Benefit Plans
- Benefit Options
- Relationships
- Decline Reason
- Benefit Change Reason

Pending Effective Date Estimator:



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CONFIGURATION

Define Session

back next | save reset cancel | print help

Session Description

Code * 2021OE

Description * 2021 Open Enrollment

Plan Year * 2021

Status * Incomplete

Dates

Session Open * 11/01/2020

Session Close * 11/14/2020

Pending Effective Date * 01/01/2021

Make sure you have completed your Pending Effective Date Worksheet available on the Learning Center

Template

You can pre-populate content from previous sessions and make changes as needed.

1. Choose a Previous Session

OEADM - Open Enrollment (2015)

2. Choose Items to Copy

- [x] Messages
- [x] Administrator Options
- [x] Deduction/Benefit Groups

(includes: Types, Plans, and Qualifiers)

Copy

PART 3:
COMMUNICATION & REPORTS

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COMMUNICATION

Prepare:

- Invitation
- Reminders
- FAQ
- Benefits at a Glance
- Presentation and Recording
- Follow-up
- Office Hours

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REPORTS

Open Enrollment Reporting:

- Open Enrollment Reporting:
  - Standard & Business Intelligence
- New Requirements?

Standard Reports Include:

- Enrollment Status
- Dependents Beyond Qualifying Age
- Employees with Benefit Group Changes
- COBRA Dropped Dependents
- Summary of Elections

Side by Side Comparison (Current Benefits vs Open Enrollment)

Current	Employee Number	Employee Name	Employee Type	Pay Group Code	Deduction/Benefit Type	Deduction/Benefit Code	Deduction/Benefit (Long)	Benefit Status	Benefit Start Date	Benefit Option or Amount	Current EE Amount
	1234	Skellington, Jack	Full Time	NBC	Medical	MED	Medical	Active	01/01/2020	Employee	$ 50.00
	1234	Skellington, Jack	Full Time	NBC	Dental	DENT	Dental	Active	01/01/2017	Employee	$ 20.00
	1234	Skellington, Jack	Full Time	NBC	Vision	VIS	Vision	Active	01/01/2020	Employee	$ 5.00

Side by Side Comparison (Current Benefits vs Open Enrollment)

OE	Deduction/Benefit Code	Deduction/Benefit	Description	Election Status	Employee Declined Plan	Benefit Option or Amount	Elected EE Amount
	MED	Medical	2021 Open Enrollment	Completed	No	Employee	$ 60.00
	DENT	Dental	2021 Open Enrollment	Completed	Yes		
	VIS	Vision	2021 Open Enrollment	Completed	No	Emloyee + 1	$ 10.00

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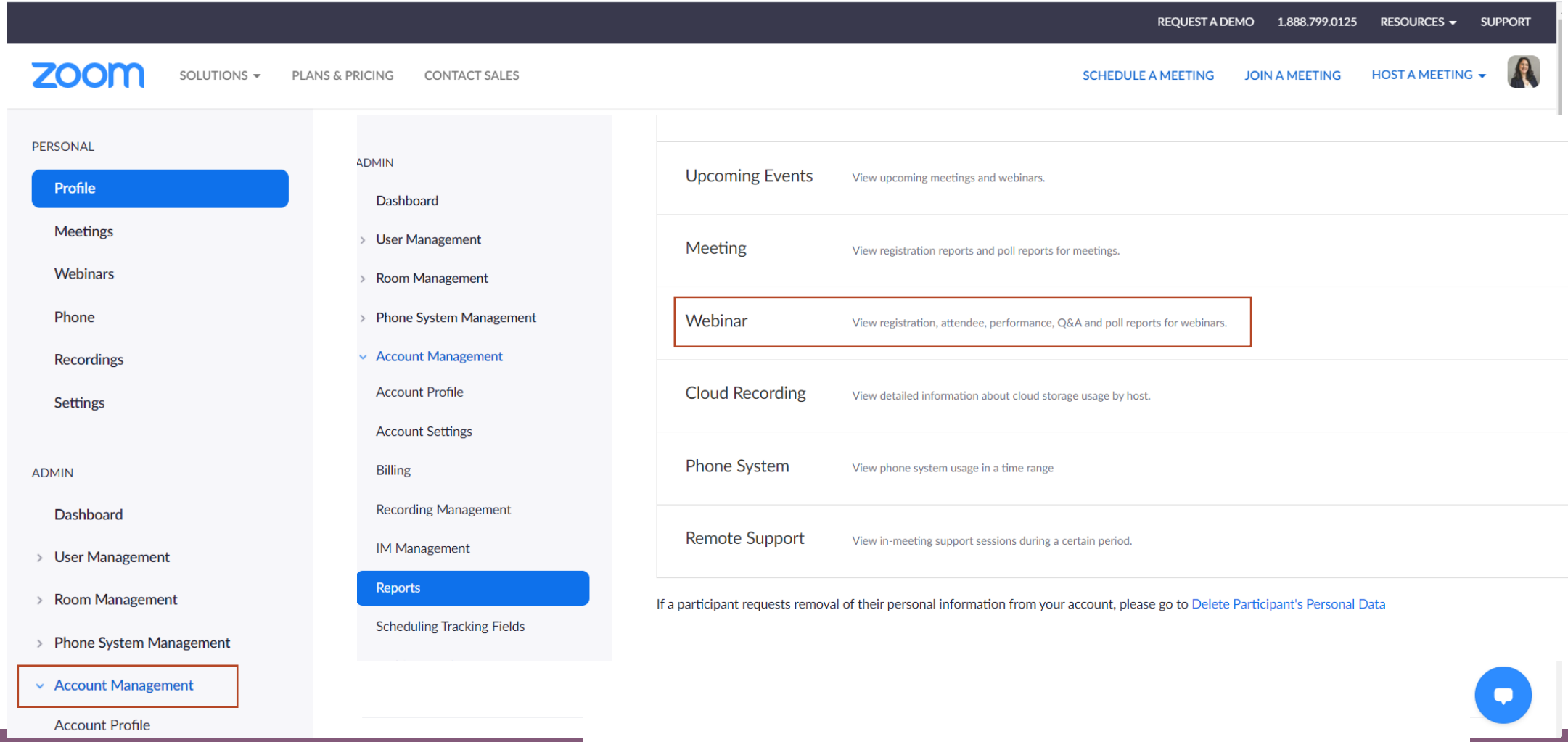
ZOOM REPORTS



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PART 4: TESTING & PRACTICE

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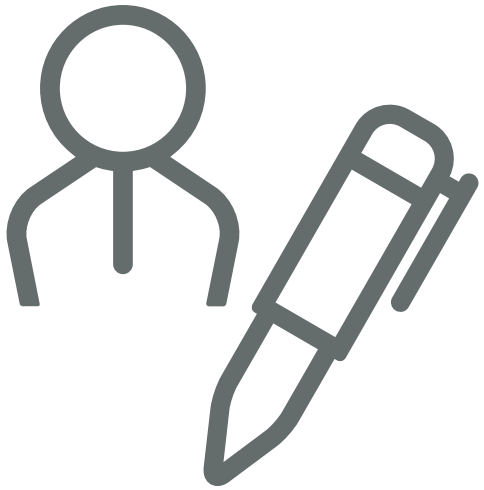
TESTING



TESTING, TESTING AND MORE TESTING

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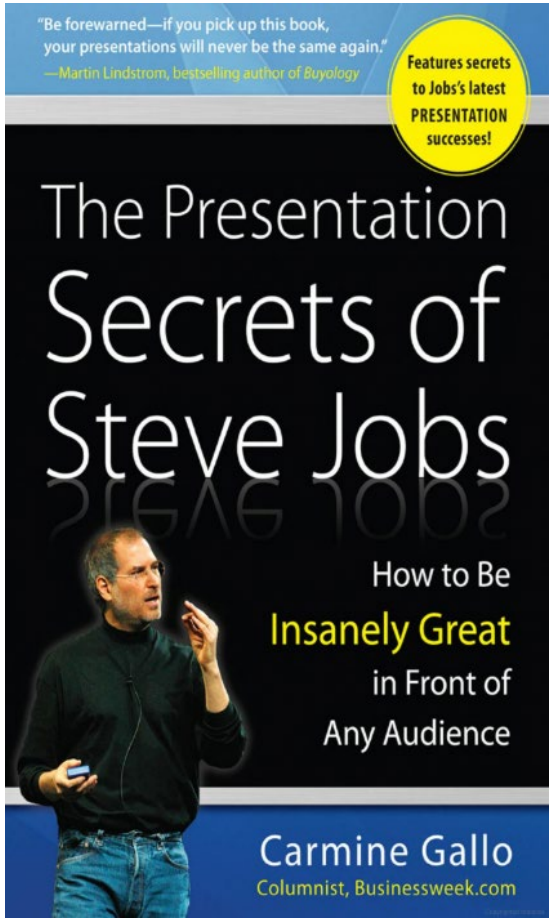
PRACTICE PRACTICE AND MORE PRACTICE



QUESTIONS?

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