Open Enrollment Checklist

Your Step-By-Step Guide to Conquering Open Enrollment

Open Enrollment Preparation

- [ ] Provide all benefit, plan, and rate change information.
- [ ] Provide open enrollment details: OE dates, active/passive enrollment, etc.
- [ ] Provide Payroll Calendar for new plan year and any payroll code changes.
- [ ] Review and make edits to the open enrollment site content documents.
- [ ] Update the Plan Comparisons directly in Bentek (if applicable).
- [ ] Update Plan Year and/or Calendar Year salaries in Bentek.
- [ ] Use Dependent Roster to review dependents aging out at end of plan year and communicate in advance with employees.
- [ ] Work with your Account Manager to check for age band changes on supplemental benefits.
- [ ] Draft open enrollment communications.

Open Enrollment Time

- [ ] Send out your expertly crafted communications.
- [ ] Arrange your Admin Dashboard to keep an eye on OE Stats, EBC submissions, new documents, unverified dependents, and dependents with Incorrect SSNs.
- [ ] Use Admin Assist to guide employees through enrollment.
- [ ] Remind new hires to enroll under the New Hire Orientation module, not the Open Enrollment module.

Open Enrollment Wrap-Up

- [ ] Verify dependents that were newly added, aged-out dependents were removed, and QDROS dependents are still enrolled.
- [ ] Make sure to enter COBRA event date and reason for dependents that aged out!
- [ ] Use reporting from Rosters or Widgets to analyze enrollment data.
- [ ] Use Benefit Changes report to capture all enrollment changes for OE.
- [ ] Use System Activity report to review dependent demographic changes.
- [ ] Transmit any completed EOI forms to carriers (if applicable).
- [ ] Work with your Account Manager to schedule your Open Enrollment carrier files.
- [ ] Coordinate FSA/HRA/HSA payroll funding amounts between payroll and vendor.
- [ ] Audit your carrier bills (list or self-billed) for accuracy of enrollment and rates.
- [ ] Work with your Account Manager to coordinate any special requests such as payroll export(s) or open enrollment deduction file(s).

Have Questions? ✉ support@mybentek.com 📞 877.523.6835