

The Ideal Open Enrollment Timeline

The most successful open enrollment campaigns start engaging employees months before enrollment begins. That means organizations should review their offerings sooner rather than later so there's ample time to develop and execute a successful campaign. Use this general timeline to help your organization prepare for a successful open enrollment period.

8-12 Weeks Before Open Enrollment



Begin developing or updating the benefits guide and highlighting new offerings, exciting changes or important information. If enrollment is virtual, it's helpful to provide links or interactive benefits tools to further guide employees through their decisions.



6 Weeks Before Open Enrollment

Consider online enrollment programs and software. This is also the time to dust off enrollment materials and update or develop educational materials based on employee usage and feedback.

4 Weeks Before Open Enrollment



Start publishing and promoting open enrollment content. It can also be beneficial to develop a toolkit for managers and leadership, complete with talking points and FAQs. Managers can relay open enrollment information to their direct reports and remind them of deadlines.



2 Weeks Before Open Enrollment

Distribute or mail any physical resources (e.g., pamphlets, brochures and mailers) to employees. As they receive more information, you can host benefits meetings to anticipate and answer questions.

During Open Enrollment



Remain available via various channels for employee questions and remind managers to talk with their teams. This is the critical time that employees receive all necessary materials, including but not limited to the enrollment schedule, deadlines, statement of current coverage, plan-specific changes, rates and summaries, open enrollment booklet and forms, and any other organization-specific information.



1-2 Weeks After Open Enrollment

Check enrollment forms for errors or missing information and submit them to the carrier. Also, follow up with employees to ensure they received their ID cards and do not have any outstanding questions.

2-4 Weeks After Open Enrollment



Relax — open enrollment season can be stressful and exhausting. However, while the current open enrollment process is still fresh in the team's mind, quickly debrief about the process, goals and results so that groundwork is already done for next year's open enrollment.



Don't worry about communicating too soon about enrollment. Research shows that repetitive messaging and reminders increase the odds of an employee seeing enrollment information and understanding upcoming benefit changes and how they work. Reach out to us for additional open enrollment information and resources.