



OPEN ENROLLMENT ROADMAP

A Professional Guide for Employers

Successful open enrollment begins with early planning.

This roadmap helps employers prepare, communicate, and implement benefit changes while ensuring employees have the information they need to make informed decisions.

90 DAYS BEFORE RENEWAL

✓	Review renewal projections and claims trends
✓	Evaluate current plan performance
✓	Establish benefit and budget objectives
✓	Develop renewal strategy

60 DAYS BEFORE RENEWAL

✓	Review plan designs and contribution strategies
✓	Finalize benefit offerings
✓	Prepare communication materials
✓	Schedule employee meetings

45 DAYS BEFORE RENEWAL

✓	Announce open enrollment dates
✓	Distribute benefit summaries
✓	Provide educational resources
✓	Launch employee communications

30 DAYS BEFORE RENEWAL

✓	Conduct enrollment meetings
✓	Review plan changes and costs
✓	Answer employee questions
✓	Provide enrollment assistance

OPEN ENROLLMENT

✓	Collect employee elections
✓	Verify dependent eligibility
✓	Review enrollment accuracy
✓	Submit carrier enrollment files

POST-ENROLLMENT

✓	Confirm implementation
✓	Resolve enrollment issues
✓	Distribute plan information
✓	Provide ongoing support

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Helping employers navigate employee benefits with confidence.