

Open Enrollment Worksheet

TASK	LABOR HOURS SPENT	HOURS SPENT WHEN ENROLLMENT IS AUTOMATED
BEGIN THE OPEN ENROLLMENT PROCESS		
Submit list of employees and eligible dependents to benefits administration company for open enrollment		1
Talk to carriers about upcoming changes to coverage		0
Put together enrollment packages		0
Compose and send email/text/written notifications about upcoming open enrollment		0
Notify employees of changes/additions/deletions to coverage(s)		0
Distribute/mail enrollment materials		0
REMINDERS		
Email, call/text reminders to employees to complete forms before deadline — weekly, biweekly, daily		0
VERIFY SUBMITTED FORMS		
Proofread every line of every returned form: verify each employee has returned all forms fully completed and signed		0
CORRECTING FORMS		
Employee misses a field/forgets to sign a form		0
Employee doesn't submit necessary documents (birth certificate, marriage/divorce decrees, court orders)		0
Return forms for correction with instructions on each of the error(s)		0
Maintain and update list of employee forms that need to be resubmitted. Separate their remaining paperwork to assemble together when outstanding forms are received		0

RESPOND TO QUESTIONS		
Respond to questions from employees about coverage, costs, or eligibility		0
Discuss coverage with family members to clarify or translate options, available plans, and costs		0
CHASE DOWN STRAGGLERS		
Track down employees who haven't turned in forms or corrected forms by phone, email, or text		0
Notification that non-submission will result in non-coverage or no change in coverage		0
FINALIZE ENROLLMENT		
Compile finished enrollment forms and submit to the appropriate carriers		0
RETURNED BY CARRIER		
Distribute any incomplete materials returned by the insurance carrier to the employee		0
Track down revised/completed forms and return to carrier		0
TOTAL HOURS INVESTED		