

Virtual open enrollment checklist for employers and HR professionals.



Congratulations on your efforts to launch or expand your virtual open enrollment strategy this year.

There are many benefits to taking your open enrollment fair online. Virtual events offer convenience for employers and employees alike, all while providing employees more time and resources to make important benefits decisions.

Whether it's your first time going virtual—or you've had a virtual strategy in place for a few years—this checklist can help you enhance your online open enrollment fair and achieve measurable results.

1

First, check in with employees.

Before you start planning for a successful open enrollment season, you'll want to understand what common benefits concerns and questions employees have had in the past to cater the information to their needs. A short survey (there are plenty of free options online) or a simple email looking for input can do the trick. Bonus points for efficiency and convenience if you're able to create an open enrollment FAQ page once you find out what those common questions are!

For example, some of the main points employees usually want to know include what the benefits program does, who qualifies for coverage, the value it provides, and how much money will come out of each paycheck.

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Did you know?

Educational open enrollment tools, resources, and employee virtual fairs are available to you through Optum Financial.

Visit openenrollment365.com for easy-to-understand materials and open enrollment season planning resources.

2

Establish a baseline for successful measurement.

It's important to understand what enrollment looked like from the prior year, so you can create a goalpost from which to measure this year's success. Virtual open enrollment fairs also allow for secondary tracking metrics that you can measure to ensure future open enrollment success, with data points on areas like content views, the types of content downloaded, average time spent in the virtual fair, and average time for one-on-one, personalized chats (if offered).

3

Choose a platform that works for your team and your budget.

There are a variety of options available, and pricing is typically based on the level of customization, the type of functionality offered, and duration of your event.

4

Create a comprehensive communications plan.

When it comes to launching a virtual open enrollment fair for employees, the seeds should be planted long before the weeks and days leading up to open enrollment. Review and update benefit plan materials at least 8 to 12 weeks before you send them out and define a roadmap for how they should be delivered. Reaching out to employees through multiple mediums (such as email, print, text, and social channels) can convey all pertinent information in a more digestible and visually appealing manner.

5

Leverage communications from your existing benefits partners.

Your benefits partners have likely already created a variety of communications about their account benefit offerings. Reach out to your partners' account representatives or surf their communications library to ensure you're using and making the most of those communications.

6

Establish the resources you're going to include in the fair.

When your employees enter the fair environment, you'll want to give them access to options that will educate them on their benefits. This may include live and on-demand webinars, short educational videos, downloadable PDFs, and one-on-one chats with HR or the benefits providers. It's best to use a variety of these options so employees can interact with the resources that best suit their learning styles.

7

Make sure the virtual open enrollment instructions are clear.

Employees will need to know how and when to attend the online open enrollment fair, as well as receive easy-to-follow directions on navigating the platform and accessing resources. Sending a checklist of materials or documents employees will need to complete enrollment will allow them to be prepared before entering the virtual open enrollment fair. Preparation is key to ensuring that all employees have access and a successful experience.

8

Provide real-life examples.

You may want to share employee testimonials in your learning materials to allow for a more personalized reading and learning experience. Anonymous testimonials are okay, too. If you're unable to receive testimonials, creating hypothetical examples and incorporating as many financial milestones as possible (such as having kids, saving for retirement, and paying down debts) allows for a more applicable context for employees.

9

Encourage leadership to participate.

When company leadership is featured in webinars, presentations, and other learning materials, it can help employees feel more connected to the organization— even at a distance. This also shows that company leadership genuinely cares about engaging with their employees and supports their well-being.

10

Send out post-enrollment surveys.

Distributing an open enrollment survey to your employees after the event will give you the opportunity to collect feedback surrounding the enrollment process. Then, your HR team can learn how to improve your employees' enrollment experiences for next time.



Don't forget:

Open enrollment may only happen once a year, but you can drive benefits education and enrollment year-round.

- To start, always keep a pulse on benefits trends, legislation, and news to stay up to date on the latest information (e-newsletters and trade publications are a great source for this!).
- You can also send supplementary emails throughout the year around certain events or deadlines, and hold educational webinars with Q&A sessions to answer participant questions (extra points if you can bring in a special guest who is an expert on the benefit topic).
- Most importantly, make sure it's communicated that your door is always open—virtually or otherwise—to answer employee questions about their benefits.



Optum Financial is here and ready to help you make the most of your open enrollment season.



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