

Whether you're kicking off open enrollment November 1, December 18, or anywhere in between, it's essential your employees are well-informed and prepared. Use the following planning tool to help determine essential dates and ensure a successful open enrollment. **All steps are suggestions.** Please refer to the second page for an example.

1. Enter your start and end date for open enrollment. Work backwards from the start date for all subsequent steps.

Open Enrollment Start Date

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Open Enrollment End Date

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2. Consider hosting a kick-off meeting approximately two weeks prior to open enrollment beginning. The meeting should give employees a top-level view of what to expect and how they can navigate open enrollment.

Kick-off Meeting

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3. Send a ReadyPay Online notification three days after hosting the kick-off meeting to gently remind employees that open enrollment is around the corner.

ReadyPay Online Notification

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4. Schedule two educational webinars. The first one can occur two days prior to open enrollment starting. The second can occur 3 - 5 days after. By hosting educational webinars, you allow your employees to hear from subject matter experts and ask questions.

Educational Webinar #1

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Educational Webinar #2

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5. Help your employees stay on track and meet deadlines with friendly reminders. Consider sending a reminder 1- 2 days before open enrollment ends.

Reminder

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Whether you're kicking off open enrollment November 1, December 18, or anywhere in between, it's essential your employees are well-informed and prepared. Use the following planning tool to help determine essential dates and ensure a successful open enrollment. **All steps are suggestions.** Please refer to the second page for an example.

1. Enter your start and end date for open enrollment. Work backwards from the start date for all subsequent steps.

### Open Enrollment Start Date

11/22/2023

### Open Enrollment End Date

12/06/2023

2. Consider hosting a kick-off meeting approximately two weeks prior to open enrollment beginning. The meeting should give employees a top-level view of what to expect and how they can navigate open enrollment.

### Kick-off Meeting

11/08/2023

3. Send a ReadyPay Online notification three days after hosting the kick-off meeting to gently remind employees that open enrollment is around the corner.

### ReadyPay Online Notification

11/13/2023

4. Schedule two educational webinars. The first one can occur two days prior to open enrollment starting. The second can occur 3 - 5 days after. By hosting educational webinars, you allow your employees to hear from subject matter experts and ask questions.

### Educational Webinar #1

11/20/2023

### Educational Webinar #2

11/28/2023

5. Help your employees stay on track and meet deadlines with friendly reminders. Consider sending a reminder 1- 2 days before open enrollment ends.

### Reminder

12/04/2023