Open Enrollment

The Insider Ins & Outs of Seamless OE

August 12, 2025

Housekeeping Items

Before We Get Started

A recording of this webinar will be sent to you after today's presentation.

Housekeeping Items

Before We Get Started

All attendees will be placed on mute.

Please place questions in the chat tab.

A survey will be sent out after the webinar.

Housekeeping Items

If you're having trouble with audio or viewing the webinar, please:

Try refreshing your browser.

Try a different browser.

Ask for assistance in the chat tab.

Meet Your Presenters

Amy Miller

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PNI•HCM & GovConPay

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Benefits Manager
PNI•HCM & GovConPay

Our Agenda

- Prepare for Open Enrollment
- Review Timelines
- Communicating with your Employees
- Open Enrollment Reporting
- Using isolved

PNI HCM GovConPay Focus Matters

Polling Question

How prepared do you feel for Open Enrollment?

*Polls will appear above the chat window.

Understanding the Open Enrollment Process

Overview of Open Enrollment & Its Significance

Key Timelines & Compliance Considerations

Enrollment Deadlines

Timely completion of enrollment windows is critical to ensure compliance and avoid penalties.

Legal Mandates Compliance

Adhering to legal mandates like ACA rules is vital for regulatory compliance and organizational integrity.

Consequences of Non-Compliance

Missing key deadlines impact can lead to penalties and negatively employee satisfaction.

Key Stakeholders Involved in Open Enrollment

HR

Payroll

Benefit Providers / Brokers / TPAs

Employees

Training Team, IT, Accounting, Executive Leadership, Legal, Regulatory Agencies

Planning Early for Open Enrollment Success

Documenting Processes & Reviewing Prior Year Outcomes

Importance of Documentation

Thorough documentation ensures a clear understanding of processes and facilitates effective review.

Analyzing Previous Outcomes

Reviewing past enrollments highlights bottlenecks and uncovers opportunities for process improvement.

Establishing an Open Enrollment Timeline

Detailed Timeline Creation

A detailed timeline with milestones helps keep all enrollment tasks organized and on track.

Early Planning Benefits

Early planning allows necessary adjustments and aligns stakeholders for smooth enrollment.

Key Dates for Open Enrollment

- OE Start Date: 11/1/2025
- OE End Date: 11/15/2025
- OE Effective Date: 1/1/2026
- Payroll Test – Preview Payroll: 12/1/2025
- Payroll Processing First Check Date w/OE Deductions: 1/2/2026
- OE File Delivery Date(s) – (carrier connections only): 12/1/2025

Open Enrollment Timeline

14-16 Weeks

- Contact Brokers / Carriers to negotiate rates / plans.

8-12 Weeks

- Carrier Reporting – confirm how you will be reporting your Open Enrollment Changes to your providers.
- Confirm Open Enrollment communication with your brokers.

4-6 Weeks

- Existing Carrier Connections – confirm date that carrier needs Open Enrollment file. (i.e. card deadlines)
- Coordinate with your assigned Benefits Consultant (OE Contact) regarding changes affecting your payroll (e.g., adding a new deduction code, special taxing, deduction frequency, etc.).
- Review and/or update benefit plans with Benefit Consultant. Provide Open Enrollment benefit changes (Plan information, rates, new SPD information)

Open Enrollment Timeline

2-4 Weeks

- Schedule OE Testing Call with your assigned Benefits Consultant.
- Review Self Service documentation provided on the isolved interface (OE Guide, SPDs).
- Confirm OE Rates are correct.
- Set up OE email alerts with the Benefits Consultant.

Day Before

- The Benefits Consultant will clear testing information for go-live.
- Send reminder or prepare a “Forgot Password” notification.

Best Practices for Open Enrollment Execution

Coordinating with Benefits Providers & Internal Teams

Timely Data Exchange

Coordination ensures prompt and accurate data sharing between benefits providers and internal teams to maintain system integrity.

Issue Resolution

Effective communication helps quickly identify and resolve problems related to benefits administration.

Accurate Benefits Reflection

Coordination ensures that benefit offerings are properly updated and represented in company systems for employee access.

Polling Question

Do you provide your employees training to prepare for Open Enrollment?

*Polls will appear above the chat window.

Communicating & Training Employees Effectively

Developing a Comprehensive Communication Plan

Messaging strategy, including communicating:

- Timelines & Scheduling
- Where to Locate Resources

Utilizing Multiple Channels for Engagement

Messages in isolved

Company Intranet

Training Sessions (in person)

Webinars

Email

Training & Reference Documents

Documentation

- Email Announcement (Kickoff)
- Reminder Emails
- How To Guides
- Benefits Handbook / SPDs
- Checklist (For You!)

Preparing Your HCM Solution for Open Enrollment

Configuring Benefit Plans & Enrollment Workflows

Accurate Benefit Plan Setup

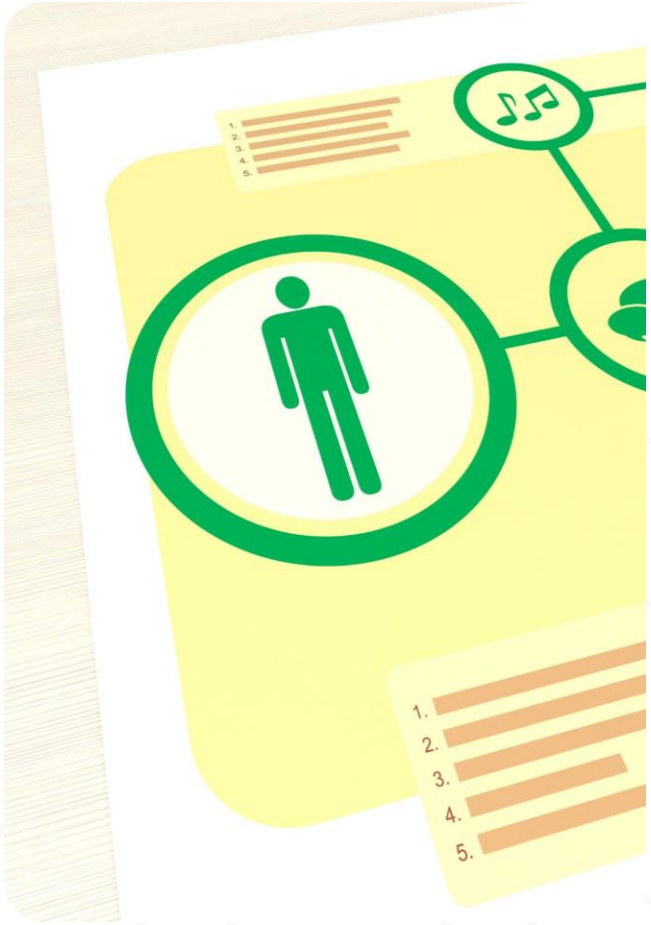
Ensure benefit plans / rates are configured precisely in the HCM system to match current company offerings.

Reflect Current Rules

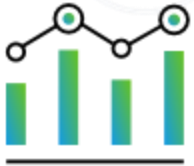
Benefit plans must comply with the latest rules and regulations for accurate employee coverage.

Enrollment Workflow Configuration

Design enrollment workflows in the system to streamline employee benefit selections and processing.



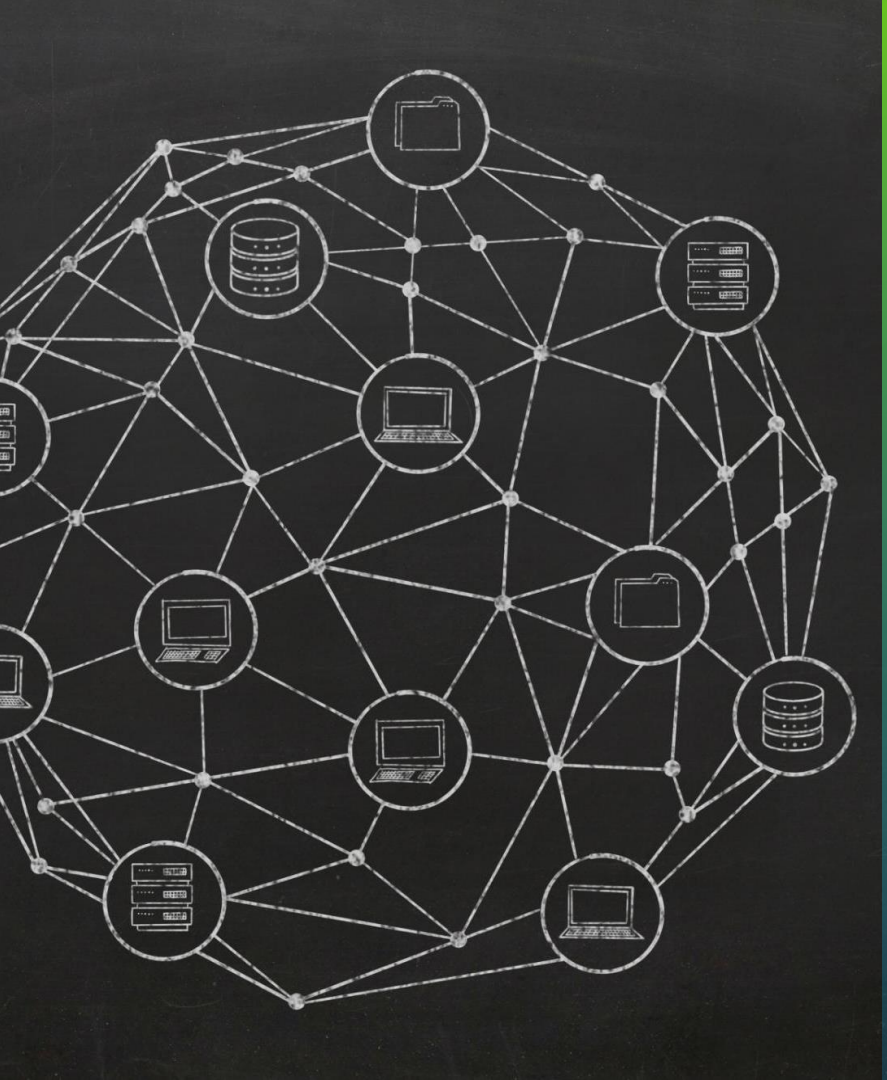
Testing System Functionality & User Experience



Evaluate User Experience

Resolve Issues Pre-launch

Test OE Functionality



Integrating Data with Payroll & Benefits Carriers

Smooth Data Flow

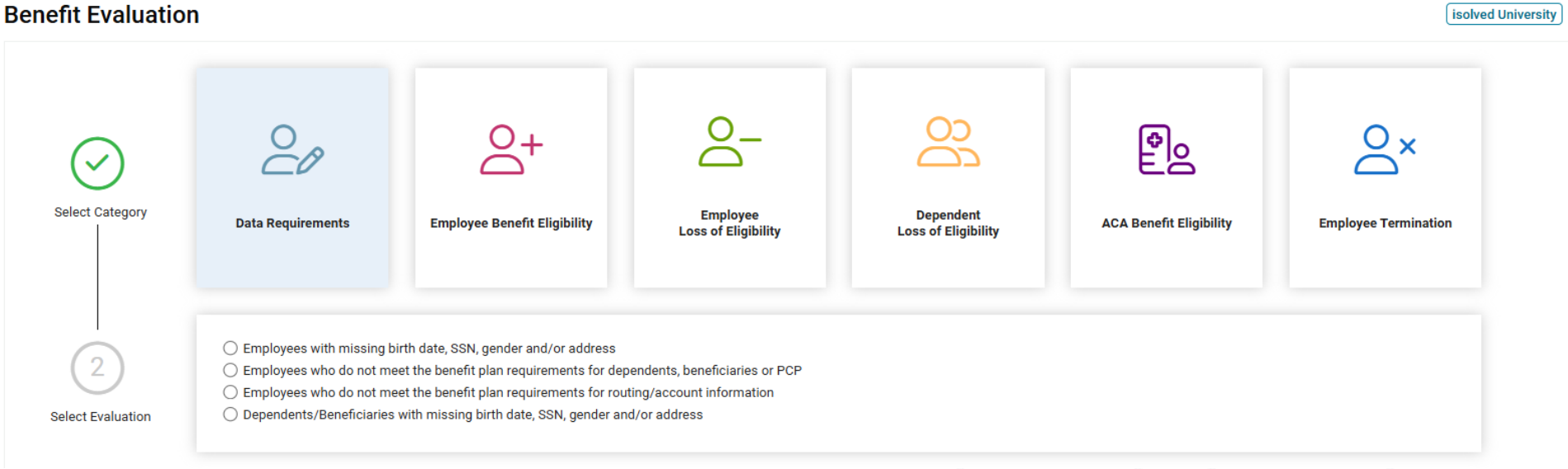
Seamless integration between payroll and benefits systems ensures accurate data exchange and reduces errors.

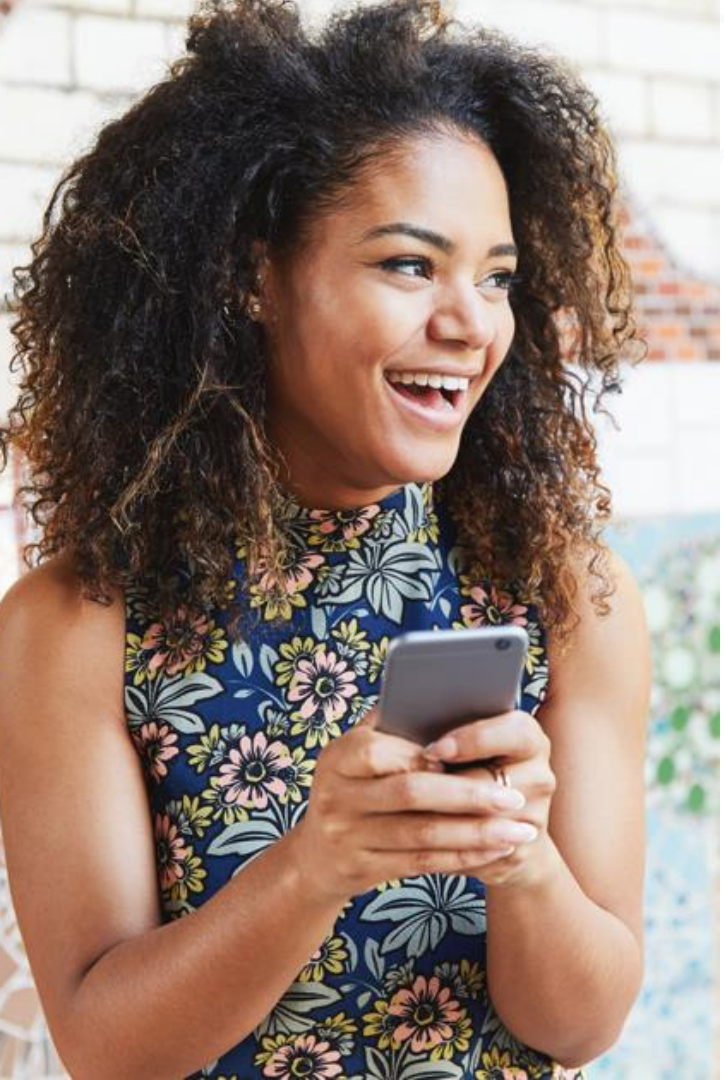
Error Prevention

Proper integration prevents mistakes in deductions and activates coverage correctly without delays.

Auditing Open Enrollment Election Information

Addressing Discrepancies Long Before Final Submission





Importance of Verifying Employee Elections

Ensuring Benefit Alignment

Verification confirms that employee benefits match their selected options accurately.

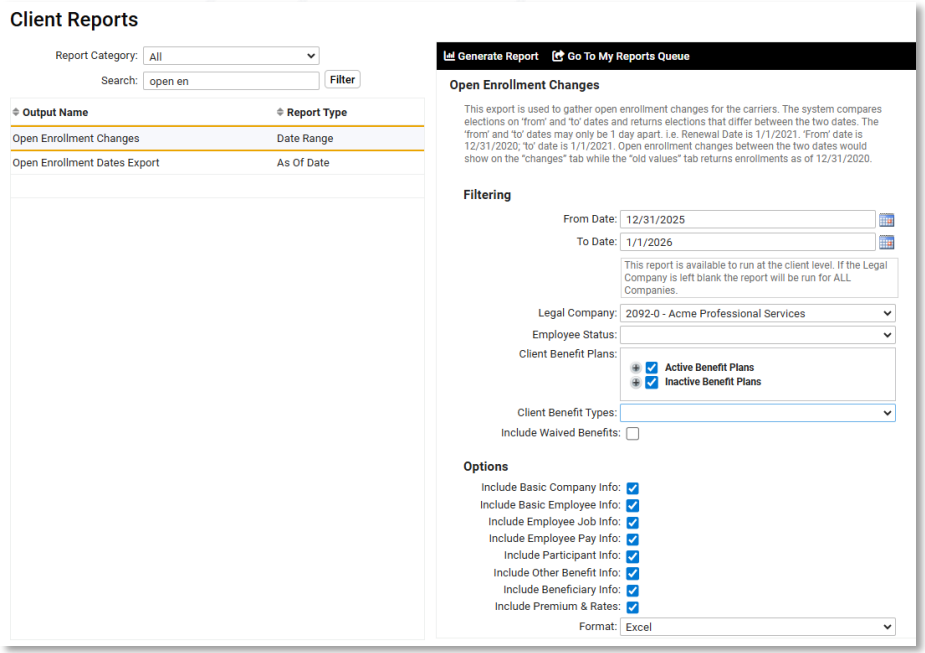
Meeting Compliance Requirements

Verification helps organizations comply with legal and regulatory standards, minimizing risks.

Risk Reduction

Proper verification reduces errors and potential legal or financial penalties.

Common Audit Procedures & Tools



Automated Reporting

Use automated reports to quickly analyze and identify discrepancies in enrollment data efficiently.

Reconciliation Tools

Apply reconciliation tools to cross-check and ensure consistency between multiple enrollment data sources.

Manual Review Process

Conduct manual reviews to validate data accuracy and catch errors not detected by automation.

Common Mistakes Companies Encounter During Open Enrollment

Overlooking Communication Gaps

Impact of Poor Communication

Ineffective communication leads to employee confusion, affecting overall productivity and clarity.

Consequences of Missed Deadlines

Missed enrollment deadlines can cause operational delays and dissatisfaction among employees.

Importance of Timely Compliance

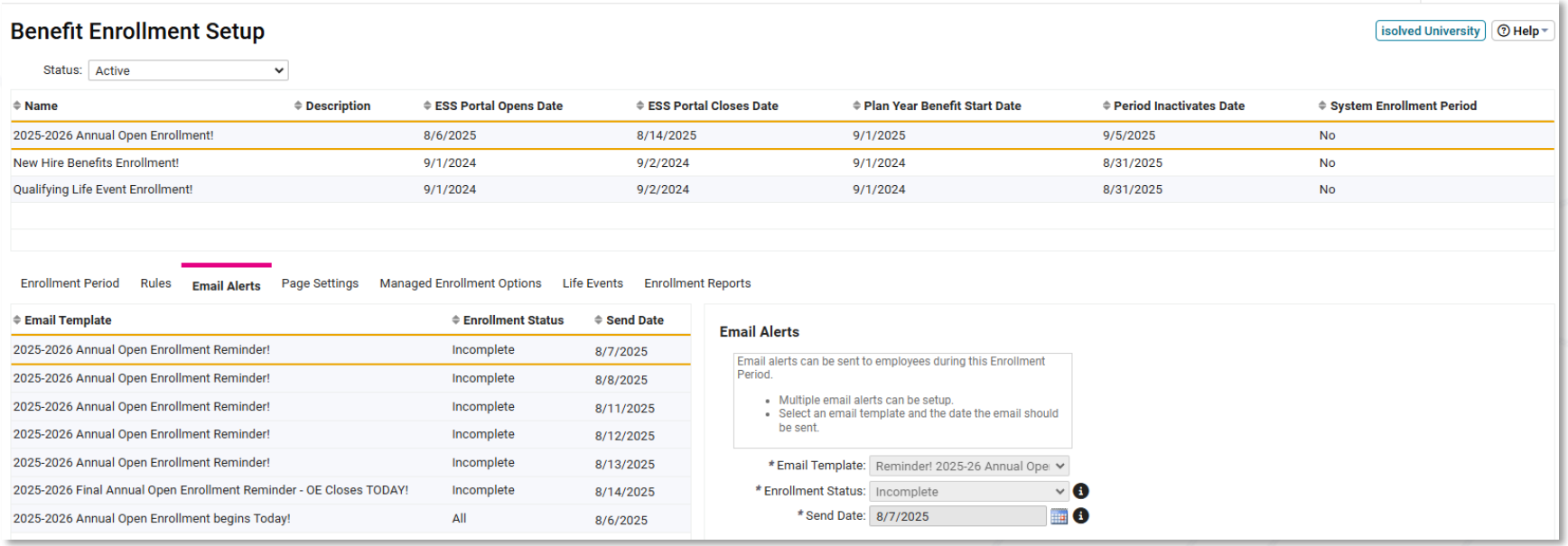
Meeting regulatory deadlines is crucial to avoid penalties and maintain legal compliance.

Polling Question

Do you have challenges with employees completing OE timely?

*Polls will appear above the chat window.

Benefit Reminders are Available



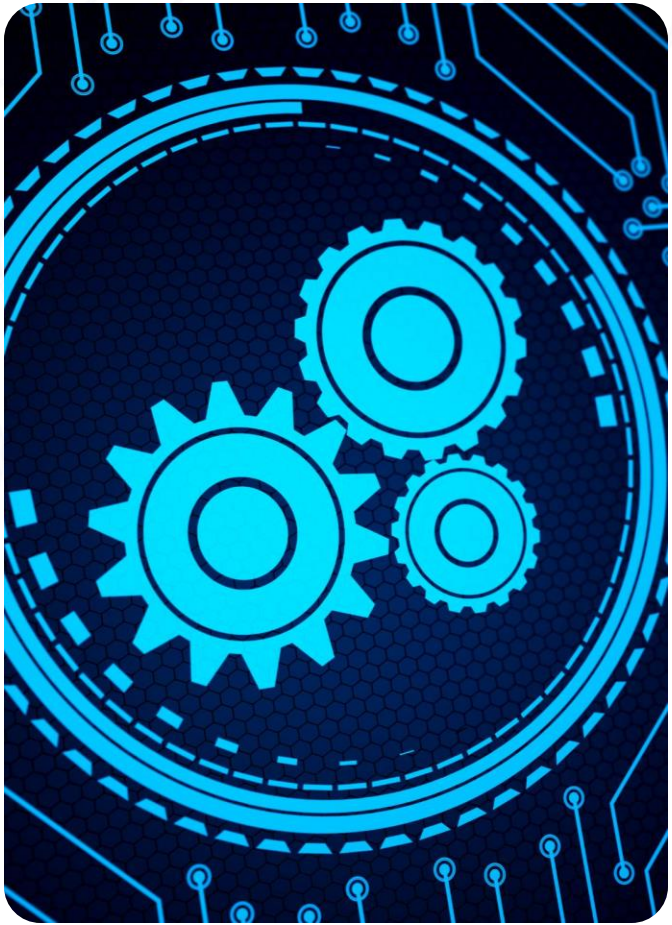
Tips for HR & Payroll Professionals to Ensure a Seamless Experience

Document Lessons Learned for Continuous Improvement

Success

Opportunities

Survey Your Employees



Leveraging Technology for Automation & Efficiency

Automation of Routine Tasks

Modern technology enables automation of repetitive tasks, saving time and enhancing productivity.

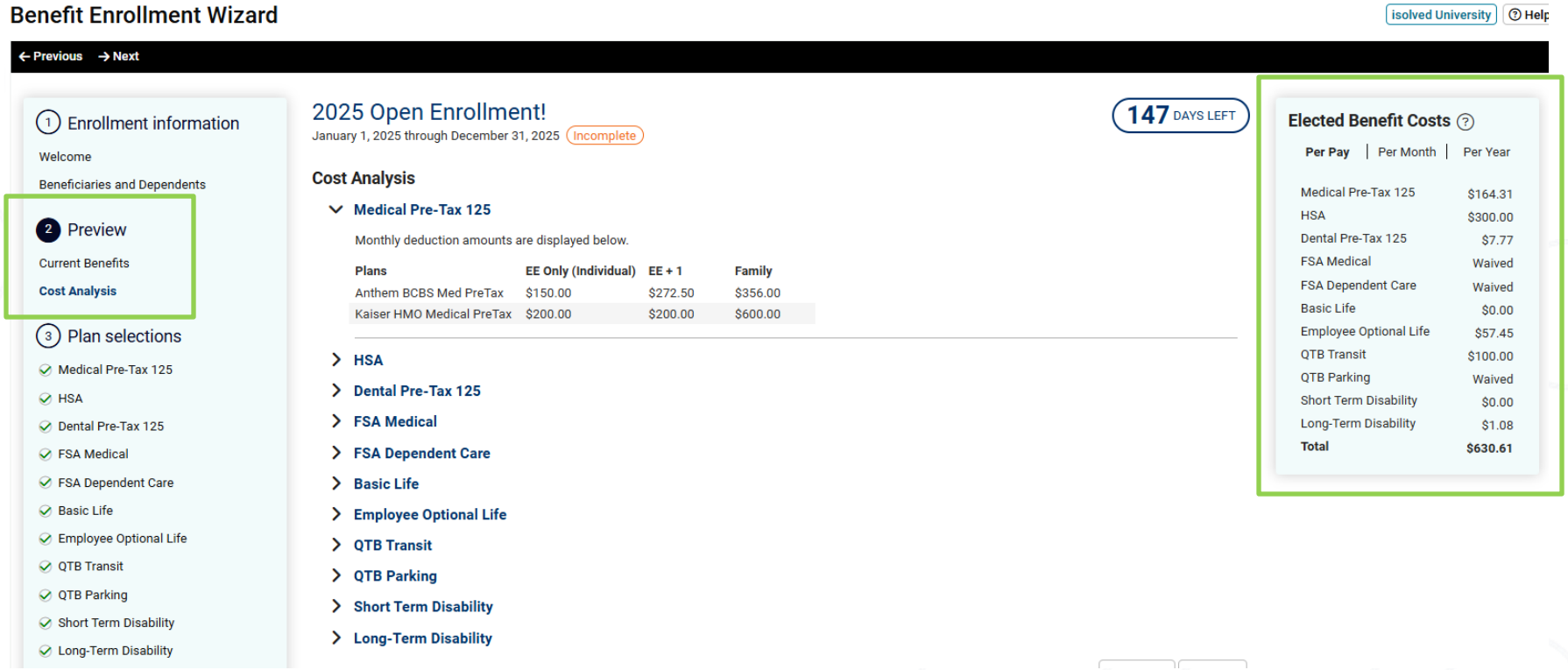
Error Reduction

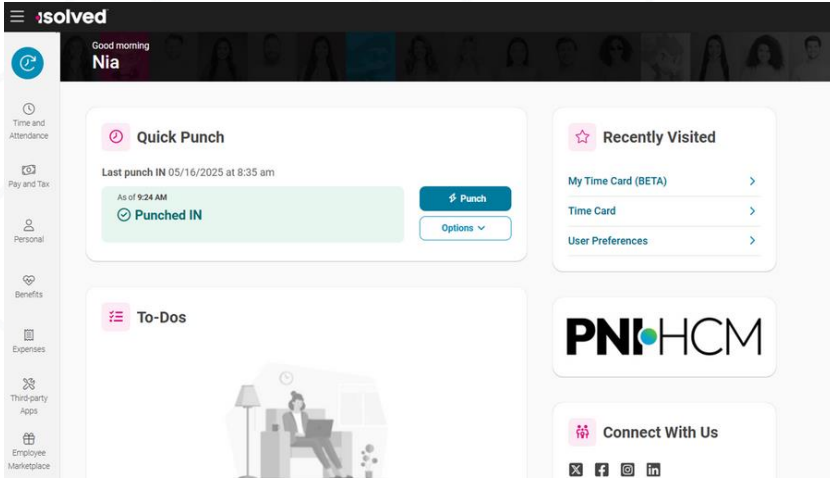
Automating processes minimizes human error, leading to more accurate and reliable outcomes.

Streamlined Enrollment & Payroll

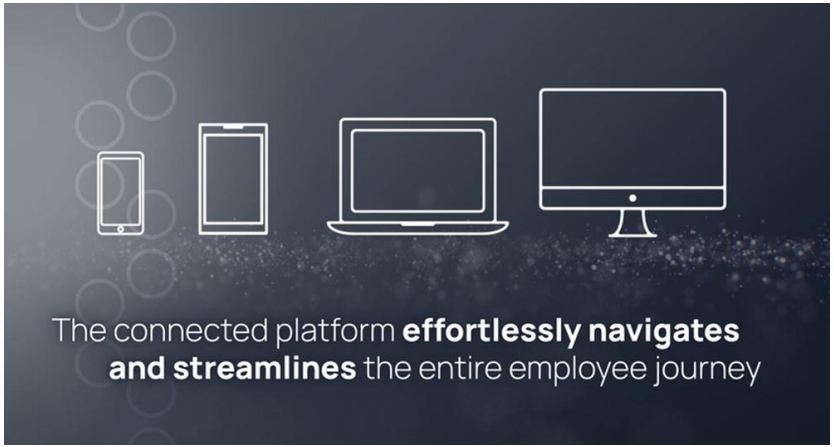
Technology integrates enrollment and payroll systems for seamless data processing and management.

Providing Clear Benefit Options & Decision Support





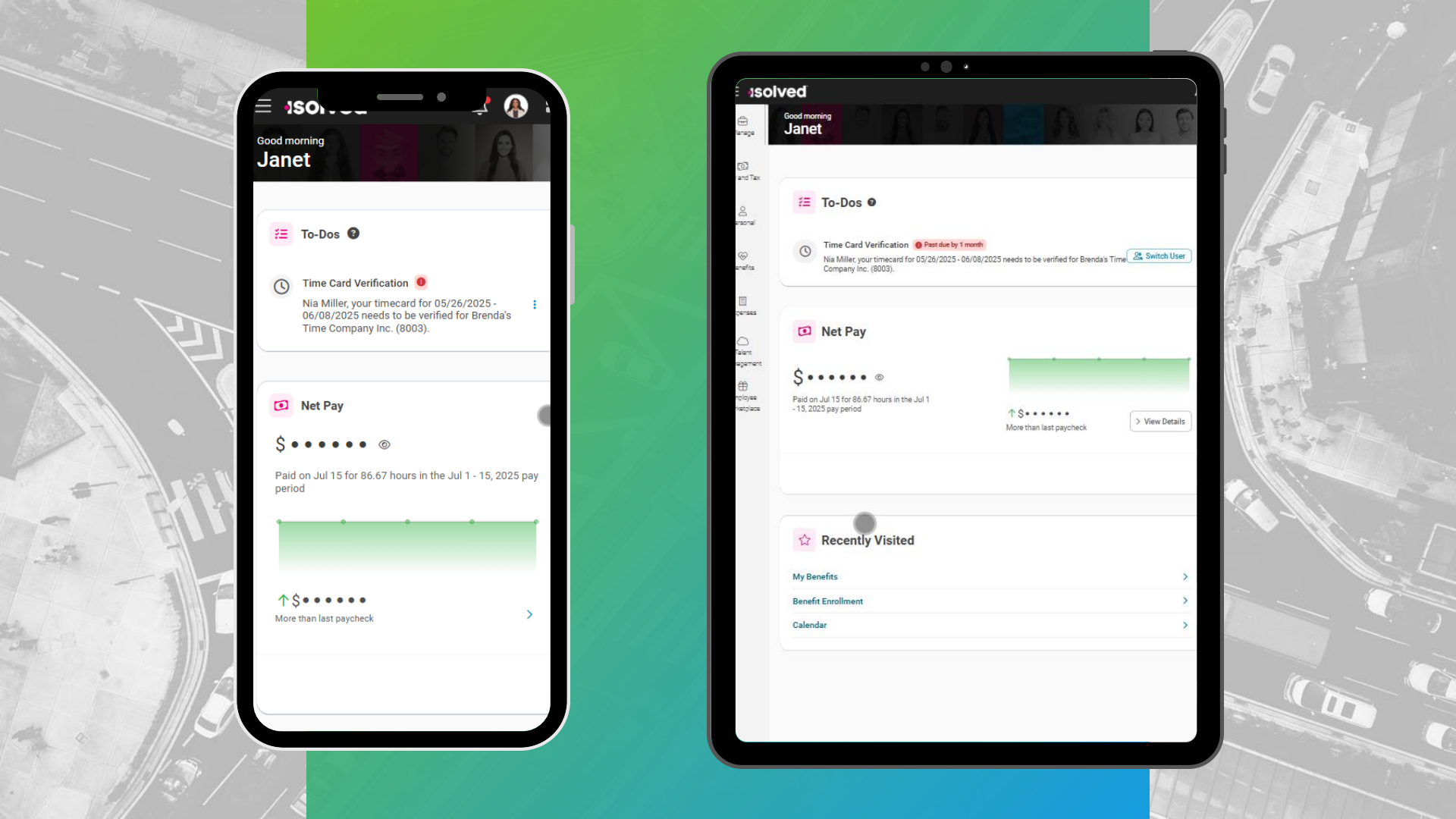
Employee self-service users can now access more tools on-the-go!



Performance-ready on any device with a browser. (Laptop, Tablet, Smart Phone)

Resources Available to You

- Open Enrollment Guide
- Open Enrollment Checklist
- FAQs (PPT)
- Year-End Website
- Open Enrollment Specialist


Good morning
Janet
To-Dos
Time Card Verification
Nia Miller, your timecard for 05/26/2025 - 06/08/2025 needs to be verified for Brenda's Time Company Inc. (8003).
Net Pay
$ • • • • • •
Paid on Jul 15 for 86.67 hours in the Jul 1 - 15, 2025 pay period
↑ $ • • • • • •
More than last paycheck
Good morning
Janet
To-Dos
Time Card Verification
Past due by 1 month
Nia Miller, your timecard for 05/26/2025 - 06/08/2025 needs to be verified for Brenda's Time Company Inc. (8003).
Switch User
Net Pay
$ • • • • • •
Paid on Jul 15 for 86.67 hours in the Jul 1 - 15, 2025 pay period
↑ $ • • • • • •
More than last paycheck
View Details
Recently Visited
My Benefits
Benefit Enrollment
Calendar

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Wednesday, September 17, 2025 at 1 pm