

Open Enrollment

PNI HCM

GovConPay  
Focus Matters

# The Insider Ins & Outs of Seamless OE

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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

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Try refreshing your browser.



Try a different browser.



Ask for assistance in the chat tab.

# Meet Your Presenters



Amy Miller

VP of Training  
PNI•HCM & GovConPay



Paula Grim

Benefits Manager  
PNI•HCM & GovConPay

# Our Agenda

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

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## 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

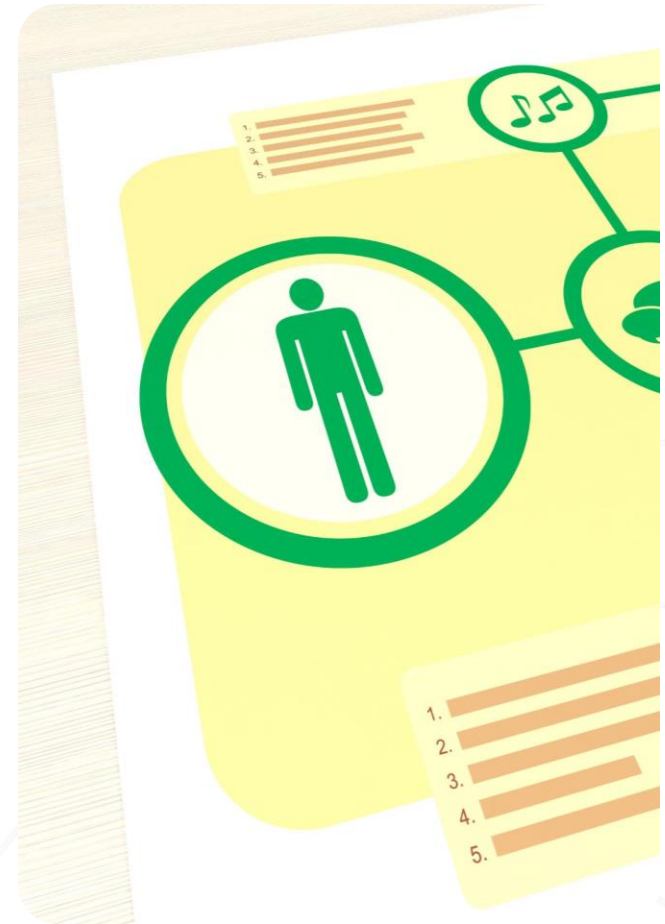
Ensure benefit plans / rates are configured precisely in the HCM system to match current company offerings.

## Reflect Current Rules

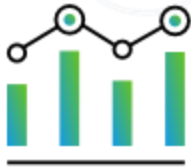
Benefit plans must comply with the latest rules and regulations for accurate employee coverage.

## Enrollment Workflow Configuration

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



# Testing System Functionality & User Experience



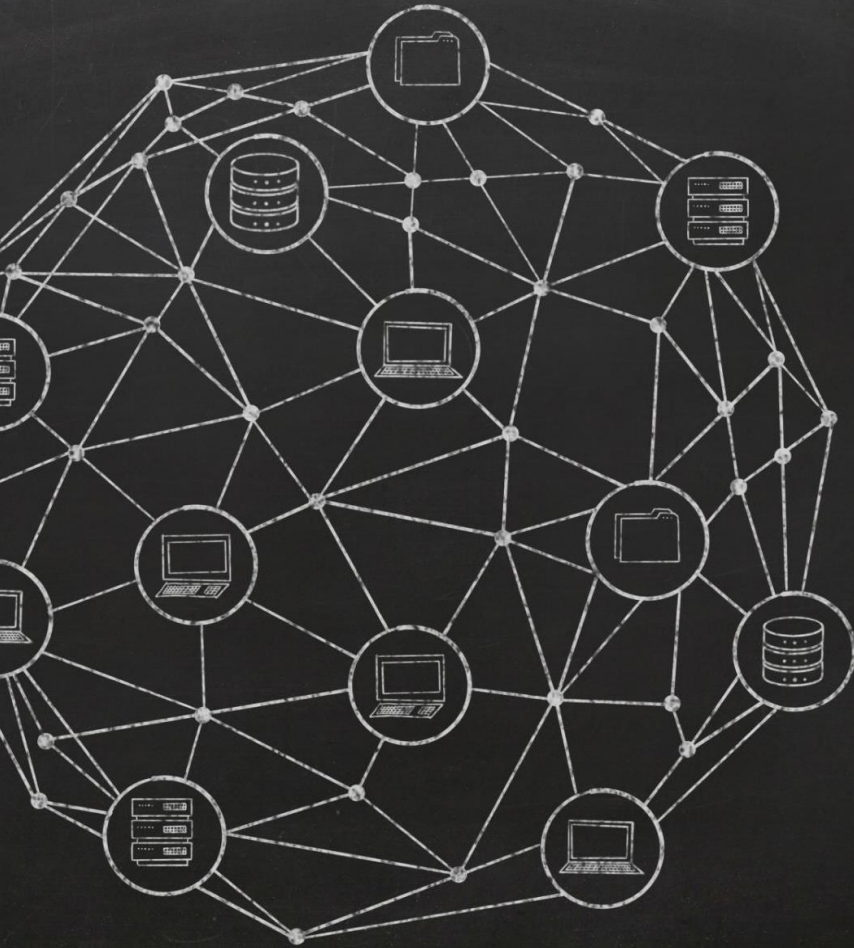
**Evaluate User  
Experience**



**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

## Benefit Evaluation

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Select Category



Select Evaluation



Data Requirements



Employee Benefit Eligibility



Employee  
Loss of Eligibility



Dependent  
Loss of Eligibility



ACA Benefit Eligibility



Employee Termination

- ☐ Employees with missing birth date, SSN, gender and/or address
- ☐ Employees who do not meet the benefit plan requirements for dependents, beneficiaries or PCP
- ☐ Employees who do not meet the benefit plan requirements for routing/account information
- ☐ Dependents/Beneficiaries with missing birth date, SSN, gender and/or address



# 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

### Client Reports

Report Category: All  
Search:  Filter

| Output Name                  | Report Type |
|------------------------------|-------------|
| Open Enrollment Changes      | Date Range  |
| Open Enrollment Dates Export | As Of Date  |

Generate Report Go To My Reports Queue

#### Open Enrollment Changes

This export is used to gather open enrollment changes for the carriers. The system compares elections on 'from' and 'to' dates and returns elections that differ between the two dates. The 'from' and 'to' dates may only be 1 day apart. I.e. Renewal Date is 1/1/2021. 'From' date is 12/31/2020, 'to' date is 1/1/2021. Open enrollment changes between the two dates would show on the "changes" tab while the "old values" tab returns enrollments as of 12/31/2020.

##### Filtering

From Date:   
To Date:

This report is available to run at the client level. If the Legal Company is left blank the report will be run for ALL Companies.

Legal Company: 2092-0 - Acme Professional Services  
Employee Status:   
Client Benefit Plans: 

☒ Active Benefit Plans  
☒ Inactive Benefit Plans

  
Client Benefit Types:   
Include Waived Benefits: ☐

##### Options

Include Basic Company Info: ☒  
Include Basic Employee Info: ☒  
Include Employee Job Info: ☒  
Include Employee Pay Info: ☒  
Include Participant Info: ☒  
Include Other Benefit Info: ☒  
Include Beneficiary Info: ☒  
Include Premium & Rates: ☒

Format: Excel

## 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

## Benefit Enrollment Setup

Isolved University [Help](#)

Status: Active

| Name                              | Description | ESS Portal Opens Date | ESS Portal Closes Date | Plan Year Benefit Start Date | Period Inactivates Date | System Enrollment Period |
|-----------------------------------|-------------|-----------------------|------------------------|------------------------------|-------------------------|--------------------------|
| 2025-2026 Annual Open Enrollment! |             | 8/6/2025              | 8/14/2025              | 9/1/2025                     | 9/5/2025                | No                       |
| New Hire Benefits Enrollment!     |             | 9/1/2024              | 9/2/2024               | 9/1/2024                     | 8/31/2025               | No                       |
| Qualifying Life Event Enrollment! |             | 9/1/2024              | 9/2/2024               | 9/1/2024                     | 8/31/2025               | No                       |
|                                   |             |                       |                        |                              |                         |                          |
|                                   |             |                       |                        |                              |                         |                          |

Enrollment Period Rules **Email Alerts** Page Settings Managed Enrollment Options Life Events Enrollment Reports

| Email Template   | Enrollment Status | Send Date |
|--|-------------------|-----------|
| 2025-2026 Annual Open Enrollment Reminder!                         | Incomplete        | 8/7/2025  |
| 2025-2026 Annual Open Enrollment Reminder!                         | Incomplete        | 8/8/2025  |
| 2025-2026 Annual Open Enrollment Reminder!                         | Incomplete        | 8/11/2025 |
| 2025-2026 Annual Open Enrollment Reminder!                         | Incomplete        | 8/12/2025 |
| 2025-2026 Annual Open Enrollment Reminder!                         | Incomplete        | 8/13/2025 |
| 2025-2026 Final Annual Open Enrollment Reminder - OE Closes TODAY! | Incomplete        | 8/14/2025 |
| 2025-2026 Annual Open Enrollment begins Today!                     | All               | 8/6/2025  |

### Email Alerts

Email alerts can be sent to employees during this Enrollment Period.

- Multiple email alerts can be setup.
- Select an email template and the date the email should be sent.

\* Email Template: Reminder! 2025-26 Annual Ope

\* Enrollment Status: Incomplete

\* Send Date: 8/7/2025



# **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

## Benefit Enrollment Wizard

Isolved University ⓘ Help

← Previous → Next

### 1 Enrollment information

Welcome

Beneficiaries and Dependents

### 2 Preview

Current Benefits

Cost Analysis

### 3 Plan selections

- ✓ Medical Pre-Tax 125
- ✓ HSA
- ✓ Dental Pre-Tax 125
- ✓ FSA Medical
- ✓ FSA Dependent Care
- ✓ Basic Life
- ✓ Employee Optional Life
- ✓ QTB Transit
- ✓ QTB Parking
- ✓ Short Term Disability
- ✓ Long-Term Disability

## 2025 Open Enrollment!

January 1, 2025 through December 31, 2025 Incomplete

147 DAYS LEFT

### Cost Analysis

#### Medical Pre-Tax 125

Monthly deduction amounts are displayed below.

| Plans                     | EE Only (Individual) | EE + 1   | Family   |
|---------------------------|----------------------|----------|----------|
| Anthem BCBS Med PreTax    | \$150.00             | \$272.50 | \$356.00 |
| Kaiser HMO Medical PreTax | \$200.00             | \$200.00 | \$600.00 |

#### > HSA

#### > Dental Pre-Tax 125

#### > FSA Medical

#### > FSA Dependent Care

#### > Basic Life

#### > Employee Optional Life

#### > QTB Transit

#### > QTB Parking

#### > Short Term Disability

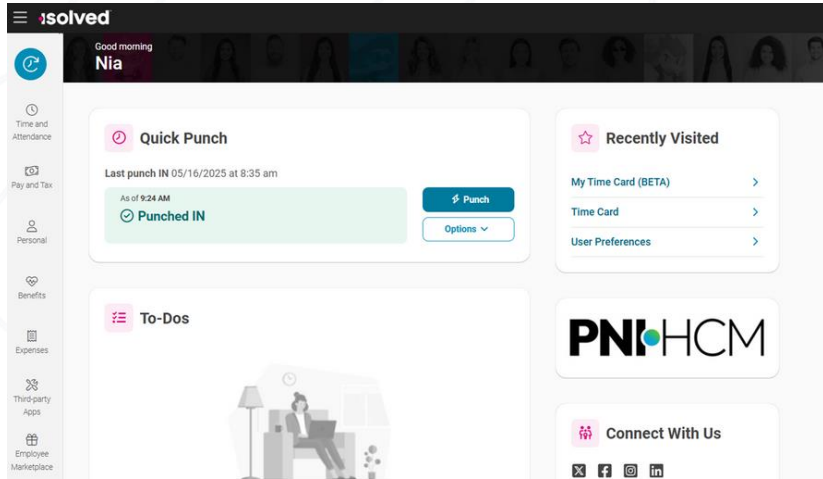
#### > Long-Term Disability

### Elected Benefit Costs ⓘ

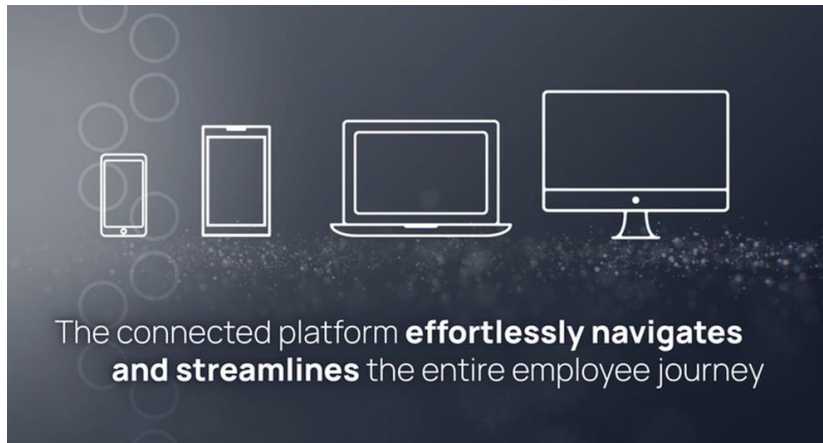
Per Pay | Per Month | Per Year

|                        |                 |
|------------------------|-----------------|
| Medical Pre-Tax 125    | \$164.31        |
| HSA                    | \$300.00        |
| Dental Pre-Tax 125     | \$7.77          |
| FSA Medical            | Waived          |
| FSA Dependent Care     | Waived          |
| Basic Life             | \$0.00          |
| Employee Optional Life | \$57.45         |
| QTB Transit            | \$100.00        |
| QTB Parking            | Waived          |
| Short Term Disability  | \$0.00          |
| Long-Term Disability   | \$1.08          |
| <b>Total</b>           | <b>\$630.61</b> |





**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**



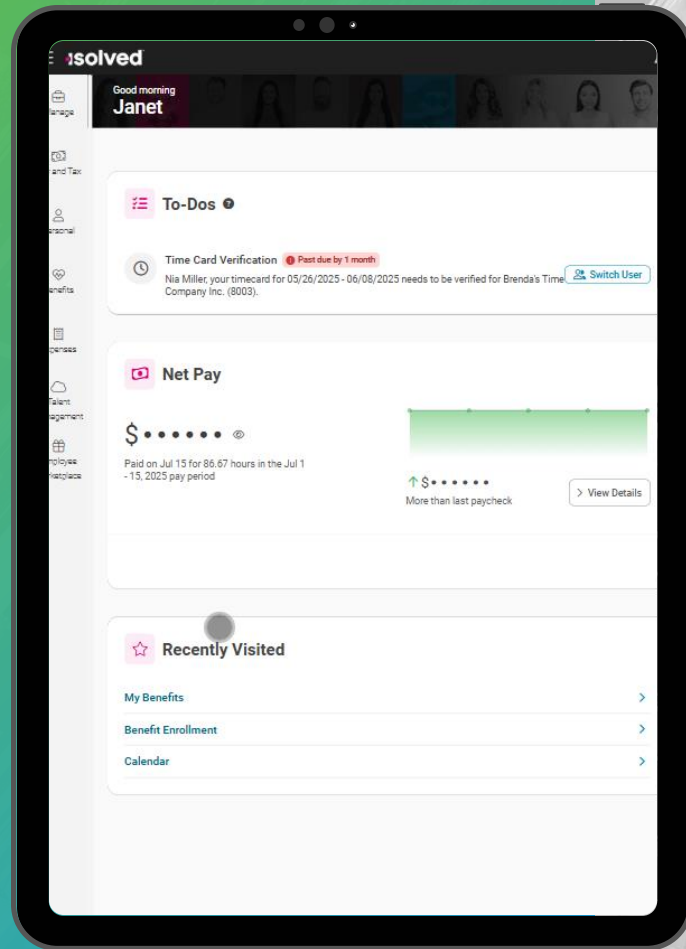
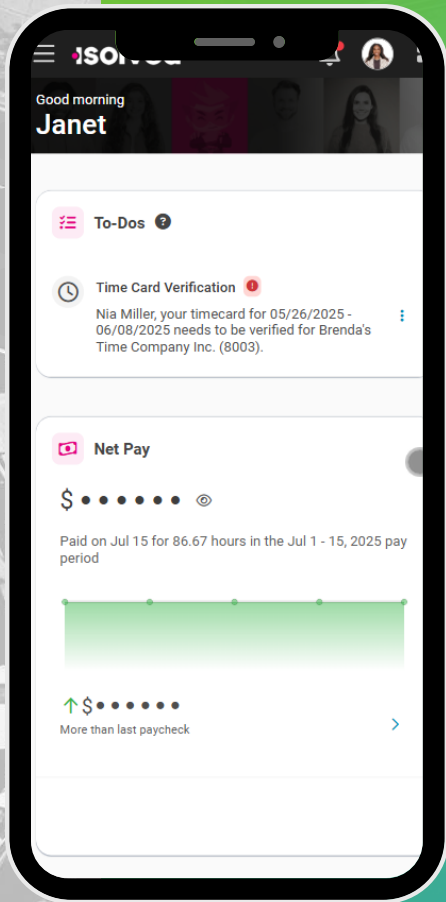
**Open  
Enrollment  
Guide**

**Open  
Enrollment  
Checklist**

**FAQs  
(PPT)**

**Year-End  
Website**

**Open  
Enrollment  
Specialist**



<https://payrollnetwork.myisolved.com>



## Welcome

Enter your account email to log in to People Cloud

☐ Remember Me

Continue

[Need help?](#)

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Thank you for joining us today!

**Any questions?**

Join Us Next Month!

# Experts on Call: When to Engage an HR Advisor



Scan to Register!

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Wednesday, September 17, 2025 at 1 pm