

How to Plan for Open Enrollment

Use this sample schedule to guide your open enrollment planning. Adjust the timing and activities to match your benefits strategy, communication style, tools and workforce needs.

✓ Early planning phase: 4 to 6 months before Open Enrollment

- Run a quick survey to understand benefit priorities
- Meet with your broker to review plan performance
- Announce open enrollment timelines and key dates
- Launch “Benefits at a Glance” materials internally

✓ Mid-planning phase: 2 to 3 months before Open Enrollment

- Host live or virtual info sessions
- Offer open hours for 1:1 HR conversations
- Provide pre-enrollment guides with plan details
- Highlight deadlines and decision tools (if applicable)
- Use giveaways or incentives to boost engagement

✓ Go-live: Open Enrollment Launches

- Open enrollment begins – send multi-channel reminders
- Reiterate deadlines and how to get help
- Track and confirm employee selections

✓ Post-Enrollment Wrap-up

- Share confirmation of benefit elections with employees
- Gather feedback on the process and experience
- Document what worked and where to improve

Contact CommPayHR today to discover how we can make your open enrollment process easier and more efficient.