



Your Financial Partner for Life



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Open Enrollment Checklist

Gather necessary forms and notifications

Timeframe: up to 60 days prior to open enrollment period

- Collect enrollment forms for new enrollments and changes
- Collect updated benefit summaries with premiums
- Draft or have your rep draft a summary of all changes

Gather required compliance notices

Timeframe: up to 60 days prior to open enrollment period

This list is not exhaustive, but these are some common notices sent out around the time of open enrollment as they can be overlooked.

- Medicare Notice of Coverage (Annual)
- Summary of Benefits and Coverage (Annual)
- Women's Health and Cancer Rights (WHCRA) (Annual)
- Children's Health Insurance Program Reauthorization Notice (CHIPRA) (Annual)
- Notice of Special Enrollment (Annual)

Prepare enrollment package

Timeframe: provide package to employees 30 days prior to open enrollment period

- Cover Letter: Include dates, contact info for questions, where to return forms, enrollment checklist and an affirmation for no changes to coverage
- Plan summaries
- Plan premiums

Create open enrollment tracking sheet

Timeframe: just in time for open enrollment

- Include all employees
- Add each benefit
- Check off as employees complete the paperwork

Complete a final review of all forms

- Make sure forms are complete
- Make sure forms are signed
- Collect Affirmation forms with signatures for no changes/waivers