

2024 HR Open Enrollment To-do List

Resources are on the **Enrollment Kit** page on the **Employer Resources** side of the Ascend to Wholeness website.

Share the Communication Toolkit with your employees

- Sample letter to employees
- o bswift login instructions
- **Distribute** documents that are on the **Enrollment Kit** page, including health plan documents and benefits guide

Run Open Enrollment progress reports in bswift at the midpoint of your open enrollment period to view your employee's completion status. <u>Since this year is a passive enrollment, not every employee</u> <u>will make an election</u>. Here are the steps:

- 1. Navigate to your employer site by selecting Role then Manager for your site
- 2. Hover over Report then select 'Report Center'
- 3. Search Open Enrollment in the search bar
- 4. Use the reports titled: Open Enrollment Complete, Partially Complete, Not Complete

Communicate with your employees at the midpoint for your open enrollment period to encourage completion if they want to change their benefit elections (see why in OE Update #3 email)

Review and approve your employee elections in bswift no later than **October 20, 2023**. Here are the steps:

- 1. Navigate to your employer site by selecting Role then Manager for your employer site
- 2. View and click on pending alerts on the home page or run a **Pending Enrollments** report
- 3. Validate <u>non-EOI</u> pending enrollments which can be approved and those which need further documentation from the employee
- 4. Validate employees are eligible for the plans and amounts they elected (i.e., Pilot AD&D, Short-term Income Protection, Voya guaranteed issue amounts)
- 5. Confirm with employees if they intended to waive coverage. If you need help to locate the waived coverage report in bswift, please contact us at **Benefits@adventistrisk.org**.
- 6. Contact employees if:
 - a) Accelerate in 2023 but didn't qualify in 2024
 - b) Access in 2023 and qualify for Accelerate in 2024
 - c) FSA in 2023, but nothing for 2024
- **Review** all 2024 employee final elections with bswift "Benefit Elections All Coverage" report dated 1/1/2024

Follow up with Evidence of Insurability (EOI) elections based on reports pulled in bswift. Please **DO NOT** approve any pending enrollments.