

Post-open enrollment checklist for HR teams

Use this checklist to maintain momentum and ensure nothing slips through the cracks after enrollment ends.

Review enrollment data

- Measure participation rates (active vs. passive enrollment)
- Analyze plan selection trends
- Confirm all benefit elections were processed correctly

Audit for accuracy

- Verify that payroll deductions align with elections
- Ensure carrier files and eligibility feeds are current
- Confirm compliance with regulatory requirements (ACA, COBRA and more)

Gather employee feedback

- Send a brief survey or “pulse check”
- Review help desk inquiries for trends
- Collect input from managers and HR partners

Evaluate communication effectiveness

- Were materials clear and easy to understand?
- Did employees engage with decision-support tools?
- Were the timing and frequency of reminders effective?

Identify pain points

- Document recurring questions or confusion
- Assess accessibility for remote and non-desk employees
- Note any system or vendor challenges

Update resources

- Revise FAQs and enrollment guides
- Refresh intranet content and digital tools
- Archive outdated materials to prevent confusion

Plan for next year

- Schedule a debrief with your benefits team and vendors
- Outline improvements for communication and education
- Consider modern formats like videos, webinars and interactive tools

Celebrate success

- Share key wins with leadership
- Thank your HR team and vendor partners
- Recognize employees for completing enrollment on time