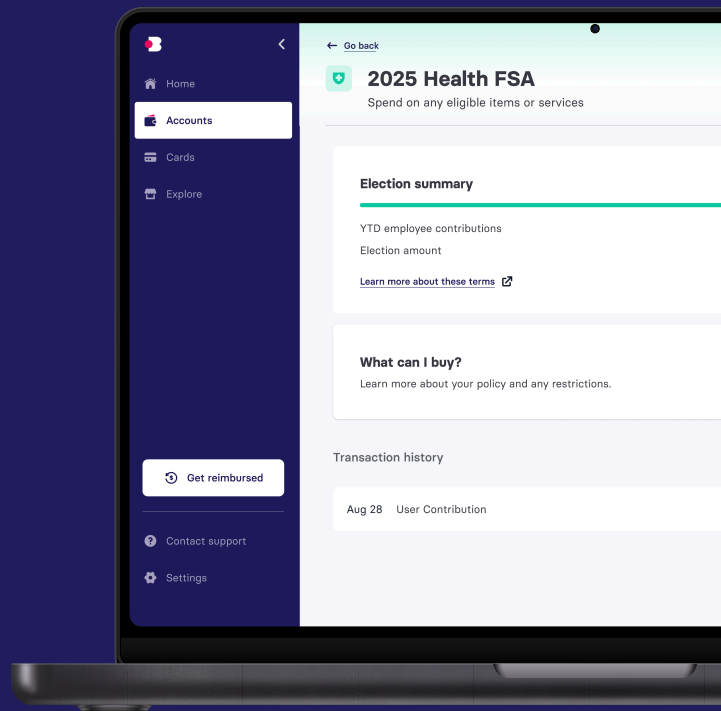


Open Enrollment Checklist

Your guide to rolling out new pre-tax benefits

Adding new benefits to your lineup is an exciting step, and we want to help you make it as smooth as possible. In this checklist, we've broken down the process into manageable steps so you can successfully launch these benefits and help your team get the most out of their expanded benefit options.

Use this first page as a simplified checklist, then read the following pages for an in-depth review of each step.



6–8 weeks before open enrollment

- ☐ Design your benefit program structure
- ☐ Finalize implementation details with your vendor
- ☐ Set up legal and compliance framework
- ☐ Configure HRIS and payroll integration

4–6 weeks before open enrollment

- ☐ Develop comprehensive communication strategy
- ☐ Build educational materials and resources
- ☐ Train your internal team extensively

2–4 weeks before open enrollment

- ☐ Launch internal awareness campaign
- ☐ Distribute detailed enrollment guides
- ☐ Host extensive educational sessions
- ☐ Prepare your internal team for launch

1 week before open enrollment

- ☐ Send final enrollment reminders and key details

During open enrollment

- ☐ Monitor adoption rates and address barriers
- ☐ Gather real-time feedback for improvement

1–2 weeks after open enrollment

- ☐ Send detailed welcome and setup instructions
- ☐ Ensure smooth vendor transitions and account setup
- ☐ Plan ongoing education and support
- ☐ Measure implementation success

6–8 weeks before open enrollment

☐ Design your benefit program structure

Review current IRS contribution limits for each pre-tax account type you're offering. Determine grace period options, rollover rules, and how benefits will integrate with existing health plans and other pre-tax programs. For accounts with flexible eligible expenses, confirm which categories you'll include. Document all decisions clearly for vendor configuration and employee communications.

Pro tip: Schedule a program design call with your vendor to discuss configuration choices and get recommendations on successful benefit structures across industries. At Benepass, we recommend this call for all programs and can help translate existing benefits into our system or advise on configurations we see work well. For pre-tax benefits, many configuration details like spending categories and contribution amounts are governed by IRS rules, so focus on year-end policies and how benefits interact with your existing programs. Take HSA and FSA combinations, for instance—employers often opt for the rollover provision instead of a grace period to avoid disrupting HSA eligibility and ensure a smoother transition between plan years. Consider leveraging a benefits broker or consultant for complex pre-tax documentation requirements.

☐ Finalize implementation details with your vendor

Complete final configuration of your benefits platform and confirm all implementation timelines. Review service level agreements, employee support protocols, and launch readiness checklists with your vendor team. Ensure all technical requirements and integration points are clearly defined and tested.

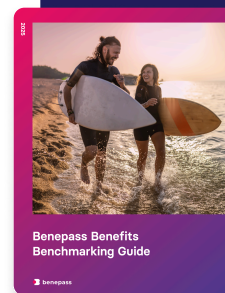
☐ Set up legal and compliance framework

Work with legal counsel and your vendor to create the required plan documents, employee-friendly benefit summaries, and enrollment agreements. Ensure your

pre-tax benefits comply with IRS regulations to protect the tax advantages for employees and avoid compliance issues for your company.

☐ Configure HRIS and payroll integration

Work with your payroll provider to set up new deduction codes, tax treatment, and reporting capabilities. Test data feeds between your HRIS and benefits platform to ensure employee eligibility and contribution amounts flow correctly.



Want to see how other companies are designing their programs? Our 2025 Benefits Benchmarking Guide shows how companies across industries are structuring their pre- and post-tax benefits programs, with real data on contribution amounts and configurations. [Download the guide](#) to see how your programs compares.

4–6 weeks before open enrollment

☐ Develop comprehensive communication strategy

Create an announcement plan that builds excitement about your new benefits while educating employees about how they work. Plan multiple touchpoints: announcement emails, town halls, manager briefings, and detailed educational materials.

How Benepass can help: We supply ready-to-use communication materials including downloadable presentations you can customize, plus we handle ongoing employee communications automatically. This includes welcome messages on launch day, transaction updates, reminders, and educational content. New hires receive program announcements when their accounts are created, and we send follow-up reminders to boost engagement.

❑ Build educational materials and resources

Build straightforward guides that help employees understand their new pre-tax benefit options. Cover the basics: how much they can contribute, what expenses are covered, and how to get reimbursed. Create simple FAQs addressing common questions about enrollment and using the benefits.

How Benepass can help: We provide several educational resources to make employee communication easier, including a downloadable, editable template where you can customize benefit details, contribution limits, and company policies to create a comprehensive employee summary. We also offer pre-built guides explaining the basics about each benefit type that you can download and share on demand. These materials give you a complete toolkit without having to create everything from scratch.

Pro tip: Make sure to safelist our domain so post-launch communications go directly to employees without hitting spam filters.

❑ Train your internal team extensively

Conduct thorough training for HR staff, managers, and anyone who will field employee questions. Since these benefits are new to your organization, ensure your team understands not just the mechanics but also the strategic value and employee value proposition.

2–4 weeks before open enrollment

❑ Launch internal awareness campaign

Begin announcing your new benefits with enthusiasm and clear messaging about the value to employees. Host preview sessions for managers and benefit champions who can help spread positive word-of-mouth. Create buzz around the enhanced benefits package.

❑ Distribute detailed benefit guides

Provide comprehensive materials explaining each new benefit, including contribution recommendations, tax savings examples, and practical usage scenarios. Since employees are learning about these benefits for the first time, over-communicate rather than under-communicate.

❑ Host extensive educational sessions

Schedule multiple information sessions at different times to accommodate all employees. Plan for longer sessions than typical since you're introducing entirely new concepts. Consider separate sessions for different employee groups or benefit types. For added flexibility, these sessions can be live or pre-recorded. We've even seen success with short 3-minute videos that employees can watch at their convenience during open enrollment or refer back to later.

❑ Prepare your internal team for launch

Prepare for increased question volume as employees learn about new benefits. Create detailed scripts for common questions, including enrollment deadlines and key dates, and establish escalation procedures for complex scenarios. Work with your vendor to clarify how they will handle employee questions, what channels they'll use, and expected response times.

How Benepass can help: Our dedicated support team handles employee questions so your HR team doesn't have to. We offer 24/7/365 in-app support where employees can submit requests directly through the Benepass app. Our support agents are trained on your company's specific spending accounts and offer multiple contact options including email, scheduled phone calls, live chat, and voicemail call-back. With 68% of issues resolved on first contact, 94% customer satisfaction, and 6-hour response times, your employees get expert help when they need it while your team stays focused on strategic priorities.

1 week before open enrollment

☐ Send final enrollment reminders and key details

Distribute last-minute reminders highlighting enrollment deadlines, key benefit details, and where employees can get support. Include quick reference guides with contribution limits, eligible expenses, and enrollment steps. Emphasize the value proposition and tax advantages one more time.



During open enrollment

☐ Monitor adoption rates and address barriers

Track enrollment patterns closely and identify any barriers preventing employee participation. Be prepared to adjust communication strategies or provide additional education if certain employee groups aren't engaging with open enrollment.

☐ Gather real-time feedback for improvement

Collect employee feedback during the enrollment process to understand what's working and what isn't. Use this input to refine your communication approach and identify areas where additional support is needed.

Tip: Host daily "office hours" during enrollment where employees can drop in with questions about the new benefits. This provides personalized support and helps build confidence in the new programs.

1–2 weeks after open enrollment

☐ Send detailed welcome and setup instructions

Provide comprehensive onboarding materials for all new benefit participants. Include account setup instructions, vendor contact information, and step-by-step guides for using each benefit. Schedule follow-up orientation sessions for January.

☐ Ensure smooth vendor transitions and account setup

Work closely with vendors to ensure all new accounts are set up correctly and employees receive their debit cards, login credentials, and welcome materials promptly. Address any setup issues immediately to maintain positive first impressions.

☐ Plan ongoing education and support

Schedule quarterly check-ins, lunch-and-learns, and ongoing education sessions to help employees maximize their new benefits throughout the year. Create a communication calendar for tips, reminders, and success stories.

☐ Measure implementation success

Analyze enrollment data, participation rates, and employee feedback to evaluate the success of your implementation. Document lessons learned and best practices for future benefit launches or annual enrollment improvements.

How Benepass can help: The Benepass Admin Dashboard provides real-time insights into program engagement and utilization trends, making it easy to monitor the success of your implementation. These analytics help you identify which benefits are resonating with employees and make data-driven decisions for future program improvements or enhanced communication strategies. Your dedicated account management team will also conduct regular reviews of this data to share insights on how your programs are performing and identify opportunities for improvement, including targeted education strategies.

Let us help you deliver modern benefits

At Benepass, we make launching new pre-tax benefits simple with streamlined HRIS integration, ready-to-use communication materials, and expert guidance throughout the entire process. From handling complex IRS compliance requirements to providing automated employee education, we take care of the heavy lifting so you can focus on what matters most—helping your employees maximize their new benefits. [Schedule a demo](#) to see how we can support your next open enrollment.



Consolidated pre-tax and lifestyle benefits

Manage FSAs, HSAs, commuter benefits, and HRAs all in one platform, along with lifestyle spending accounts, wellness stipends, and other fringe benefits.



Enterprise-grade security

We're SOC 2 Type II certified, HITRUST compliant, and GDPR compliant for maximum data protection.



One card for all accounts

We offer physical, virtual, and tap-to-pay options for easier spending.



Proprietary technology

We own our entire tech stack, ensuring reliable performance and rapid innovation.



White glove service

Our 98% customer satisfaction rating reflects our commitment to supporting both admins and employees.

