

Benefits Administration Provider Scorecard: Open Enrollment



How Did Your Benefits Administration Provider Perform During Open Enrollment?

Open enrollment (OE) is the moment your benefits platform is truly put to the test. For many HR teams, it's also the moment that reveals where technology is helping or creating challenges.

Once this year's OE is behind you, your experiences can offer valuable insight. We created this scorecard to help you reflect on how well your current provider supported your needs and identify opportunities for stronger results going forward. We also outlined "What Good Looks Like" as a suggested foundation for what to consider in an optimal benefits administration provider.



How to use this scorecard

Work through each section and answer questions with a simple Yes or No, based on your experience during this year's open enrollment and benefits administration provider.

- ✓ Check "Yes" if your current provider met or exceeded expectations on that point.
- ✗ Check "No" if your provider did not meet that need or you're unsure.
- ✚ Count your "Yes" answers in each section, then add them up on the final page for your total score (out of 20).

The higher your score, the more effectively your benefits administration provider supported you and your people through open enrollment. A lower score points to areas that offer opportunities for improvement before next year.

System Reliability & Performance

What good looks like: Your platform stayed up and responsive under peak open enrollment traffic. HR administrators could see enrollment progress in real time and resolve errors quickly without opening a vendor ticket or waiting on outside help.

Criterion	Yes	No
OE Uptime Under Peak Load During open enrollment, did your platform stay up and responsive under peak traffic, with no noticeable slowness, timeouts or downtime?	☐	☐
OE Launch Readiness Did your open enrollment launch on time, fully functional, with all plan types and carrier connections live on day one?	☐	☐
Real-Time Enrollment Visibility Could you pull live enrollment progress, incomplete enrollee lists and error reports during open enrollment without IT or vendor help?	☐	☐
Enrollment Error Recovery When enrollment errors or eligibility mismatches surfaced, were they caught and fixed quickly before they reached carriers and employees?	☐	☐
OE Change Process Were changes throughout OE (rate corrections, file fixes, etc.) handled smoothly without disrupting the employee experience?	☐	☐

Yes answers in this section: __/5

Employee Open Enrollment Experience

What good looks like: Employees received the support they needed throughout open enrollment, on mobile or desktop applications, with personalized guidance available to them with which they were able to make informed benefits choices based on their individual needs.

Criterion	Yes	No
OE Decision Guidance Did employees receive personalized, easy-to-understand plan guidance during open enrollment rather than generic side-by-side comparisons?	☐	☐
OE Mobile Access Could hourly, hybrid/remote and multi-location employees complete enrollment easily from a mobile device?	☐	☐
OE Employee Support Did your vendor provide tools and resources to support employees through enrollment, such as a call center, chatbot, online guides or in-platform help?	☐	☐
Communication & Education Did open enrollment communications drive real understanding and action and could you measure engagement with the content that was delivered?	☐	☐
OE Self-Service & Recovery Could employees resume incomplete enrollments, correct mistakes and get help without HR intervention?	☐	☐

Yes answers in this section: __/5



HR Team Impact & Support

What good looks like: Your vendor acted as an extension of your HR team during open enrollment by identifying problems before you found them, responding quickly under pressure and reducing your workload.

Criterion	Yes	No
Administrative Workload & Overtime Did the benefits platform help reduce your HR team's workload and need for overtime related to enrollment during open enrollment?	☐	☐
OE Support Responsiveness During open enrollment, were you able to quickly reach a knowledgeable, dedicated support team, rather than waiting in a queue or speaking with different representatives each time?	☐	☐
Proactive OE Monitoring Did your vendor flag issues (data errors, failed carrier files, eligibility gaps) before you found them?	☐	☐
Special-Case Handling Were new hires, qualifying life events and complex eligibility scenarios handled smoothly during the open enrollment window?	☐	☐
OE Knowledge & Expertise Did your vendor's team demonstrate deep knowledge of your specific benefits plans and configuration so you felt supported by experienced individuals who understood your needs?	☐	☐

Yes answers in this section: __/5

Accuracy, Scale & Accountability

What good looks like: Your benefits administration provider protected data under high-volume exchange, provided OE insights that drove action and held itself accountable to service levels directly tied to your most critical window of the year.

Criterion	Yes	No
Carrier & Payroll Accuracy Did carrier files and HRIS/payroll integrations flow cleanly during open enrollment — without manual reconciliation or rework afterward?	☐	☐
OE Insights & Trend Visibility Did your vendor provide visibility into what was driving employee questions during open enrollment so you could spot trends, prioritize outreach and address issues before they escalated?	☐	☐
Support Scalability Did your vendor deliver the same quality of support during open enrollment as your steady-state period?	☐	☐
Data Security Confidence Did your vendor proactively share SOC 2 Type II certification, a signed HIPAA Business Associate Agreement and a clear data breach notification protocol?	☐	☐
OE-Specific SLA Accountability Does your contract include Service Level Agreements (SLAs) tied to open enrollment uptime and support response?	☐	☐

Yes answers in this section: __/5



Your Open Enrollment Score

Count your “Yes” answers in each section, then add them up for your total score.

Focus Area	Yes Answers
System Reliability & Performance	___/5
Employee Open Enrollment Experience	___/5
HR Team Impact & Support	___/5
Accuracy, Scale & Accountability	___/5
TOTAL SCORE (Maximum: 20 points)	___/20

What Your Score Means

Score	What it Means	Recommended Next Steps
18–20	Smooth OE, strong partner: Open enrollment ran smoothly and your platform delivered.	Use this scorecard annually to stay ahead of the curve and keep pushing your benefits administration provider on experience refinement and innovation.
14–17	Workable OE, real friction points: You have a working relationship with clear room to grow.	The questions on which you answered “No” are your priorities. Share the results with your provider and set measurable improvement milestones before next year’s window.
10–13	Strained OE, platform constraints: Your benefits program may be constrained by your technology.	This is a meaningful inflection point for HR teams and it may be worth exploring alternatives and requesting a competitive briefing.
Below 10	Difficult OE, partner vulnerabilities: This year’s open enrollment likely cost you in administrative time, employee experience and accuracy.	A structured evaluation with, or from, your benefits administration provider can highlight exactly where the gaps are and what better looks like.

Ready to see what better looks like?

Our Buyers Guide for Strategic Benefits Administration and Engagement helps you compare vendors with confidence, showing you what to look for, what to ask and how to identify the platform that effectively supports you and your people.



Download the Buyers Guide

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