

Open Enrollment Metrics Report Template

Secure your seat at the table with a
comprehensive evaluation of OE.

Benefitfocus for *life*[™]

How to Use this Template

You invest **time and hard work into your open enrollment strategy** along with the multitude of activities it takes for it to be successful.

The post-OE presentation to leadership is an opportunity for you to **shift the perception of your team from transactional support to strategic partners** within the company. Use this template as a guide for your next presentation to make sure you shine.

Plus, check the notes field for helpful tips on each slide for tracking and reporting open enrollment metrics, so you can **quantify initiatives, track progress toward your objectives and drive informed decision making**.

Get started now!

INSERT LOGO
HERE

PRESENTATION TITLE

Month/Day/Year

Agenda <EXAMPLE>

1. Open Enrollment Objectives
2. Themes, Events & Communication
3. Open Enrollment Review & Benefit Comparisons
4. Financial Impact
5. Next Steps

Open Enrollment Objectives

- Objective 1
<EXAMPLE>: Put in place a diverse set of programs, products and policies that allow our employees' total well-being to thrive.
- Objective 2
- Objective 3

Open Enrollment Themes, Events & Communication

Theme: Showcase the total value of our benefits package by illustrating all the different aspects that support total well-being.

Events:

- Onsite Benefits Fair
- Webinar(s)

Communications:

- Benefits Guide
- Open Enrollment Highlights Video
- Emails
- Text Messages & Push Notifications



Open Enrollment Overview



1,000

Active Employees



89%

Of employees made an active decision

Plan Participation



- HDHP Premier
- HDHP Standard
- PPO Premier
- PPO Standard



**Enrollment on
Mobile vs.
Desktop:
55% / 45%**

10%

Increase in
HSA
contributions

5%

Increase in
FSA
contributions

Active vs. Passive Enrollments Review

YEAR> Active Enrollments

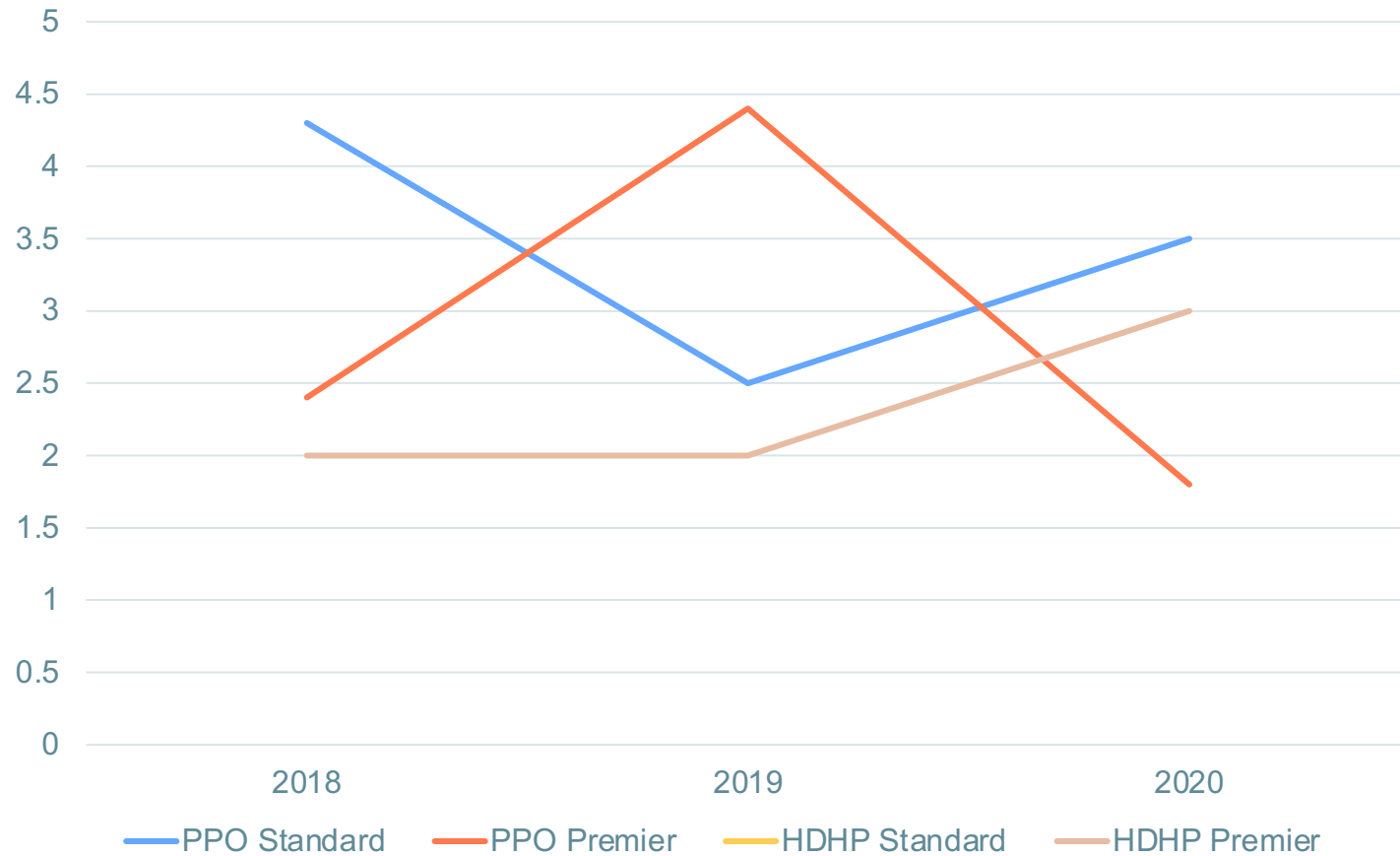
- Medical, Dental & Vision
- Consumer Driven Health Accounts
- Financial Wellness Product
- Voluntary Life Products

<YEAR> Passive Enrollments

- Identity Theft Insurance
- Pet Insurance
- Company Sponsored Benefits

Plan Enrollment Trends

A year-over-year look at plan enrollment



Observation 1

- Commentary

Observation 2

- Commentary

Observation 3

- Commentary

Core Benefit Plan Comparisons

Trends in Medical, Dental and Vision Benefits

% of Eligible Population Enrolled	<YEAR>	<YEAR>	% Change
Total Medical Plan Participation	x%	x%	x%
HDHP Participation	x%	x%	x%
Total Dental Plan Participation	x%	x%	x%
Total Vision Plan Participation	x%	x%	x%

Enrollment Tier Breakdown:

- Employee Only = x%
- Employee + Spouse = x%
- Employee + Children = x%
- Employee + Family = x%

Observation 2

- Commentary

Observation 3

- Commentary

1,500

Total HSA/FSA/HRA accounts

\$150,000

Employee and <COMPANY NAME> contributions

Consumer-Directed Healthcare Account Contributions

Trends in enrollment & contributions towards tax-advantaged accounts

Account Type	% Participation (of those eligible)	Average Contribution Amount	Percent +/- in Avg. Contribution Amount
HDHP + HSA (Individual)	90%	\$1,500	6.3%+
HDHP + HSA (Family)	95%	\$3,500	9.6%+
LP-FSA	65%	\$1,175	4.5%+
DCFSA	50%	\$3,500	1.7%+

Employees Maxing Out HSA

- There was a x% increase in the number of associates maxing out their HSA accounts.

HSA Contribution Increases

- x% of employees increased their HSA contributions by an average of \$xxx.

Observation 3

- Commentary

Voluntary Benefit Plan Comparisons

Trends in voluntary benefit enrollment over time

% of Eligible Population Enrolled	<YEAR>	<YEAR>	% Change
Long-term Care	x%	x%	x%
Critical Illness	x%	x%	x%
Hospital Indemnity	x%	x%	x%
Financial Wellness	x%	x%	x%
Student Loan Assistance	x%	x%	x%
Identity Theft Plans	x%	x%	x%
Legal Plans	x%	x%	x%
Pet Insurance	x%	x%	x%

Financial Impact for <COMPANY NAME>

EXAMPLE

Positive financial results from OE success metrics

OBJECTIVE	METRIC	IMPACT (Industry averages)	POTENTIAL RESULTS
HDHP Migration	15% increase	Employee takes on higher cost-sharing	\$<> In savings per employee
Dependent Verification	Identified 8% ineligible dependents	Removed ineligible dependents with annual claims costs at \$3,500	\$<> Overall cost savings
Tobacco Cessation	25% of applicable population enrolled	Anticipate x% reduction in claims	\$<> Cost savings for benefits plan
Telemedicine	35% enrollment	Anticipate x% reduction in outpatient visits	\$<> Cost savings for benefits plan

Feedback & Learnings

- Qualitative Data Sources:
 - Survey & Comments
 - HR/Benefits Inbox
 - Call Center
- Learnings
 - Experience
 - Access
 - Other



Focus Areas for <ENTER YEAR>

FOCUS AREA 1

- Describe any focus areas and how that will translate to strategy for the year to come.

<EXAMPLE> ENCOURAGE HSA CONTRIBUTION INCREASES

- HDHP enrollments increased; however, we did not see a complementary increase in HSA contributions, putting our employees at financial risk when having to cover a higher out-of-pocket expense to meet their deductible. We plan to launch a campaign around the triple tax benefits of an HSA along with holding quick webinars on how to maximize consumer-driven health savings accounts.

<EXAMPLE> HIGHLIGHT STUDENT LOAN REFINANCING

- We onboarded 100 new employees last year many of whom are Gen Z, bringing our total of Gen Z employees to more than half of our workforce. We anticipated higher adoption of our student loan refinancing benefit during enrollment; however, noticed that enrollment didn't meet our expectations. We plan to run a featured campaign around this benefit over the month of May during graduation season, including emails, flyers and bringing the vendor onsite to meet with interested employees.

