

Open Enrollment

Freebie Resource Kit

LeMay HR Consulting branded, editable resources for benefits education, engagement, and employee follow-through.

FREEBIE SECTION IDEAS

Benefits Basics

Open Enrollment Checklists

Mini Trainings

Scenario Games

Tips + Tricks

What's Included

Use these as downloads, email attachments, posts, mini-trainings, handouts, or lead magnets.

1

Intro / Training Deck

Announce dates, changes, what to bring, and how to enroll.

3

Clue Hunt + Bingo

Prize-friendly employee engagement activities.

5

Scenario Game

Real-life benefit situations with answer reveals.

2

Benefits App + Contact Card

QR code card template for carrier apps and reps.

4

Did You Know Messages

Short education pieces for posts, emails, screens, or handouts.

6

Tips + Tricks Section

Reusable web/freebie section copy and content ideas.

Open Enrollment 20XX

What employees need to know this year.

DID YOU KNOW? Use the app card + checklist to lower repeated questions.

CAL

Dates & Deadlines

[Start Date] to [End Date]
Complete by [Deadline Time]

GO

Where / How to Enroll

[Enrollment System]
[Link or instructions]

NEW

What's Changing

[Plan/option/carrier updates]
[New options or requirements]

SAME

What's Staying the Same

[Continuing benefits]
[Resources and support]

LIST

What to Bring / Review

Dependents • medications
providers • beneficiaries

?

Questions?

Contact [HR / Benefits]
[Phone] | [Email]

Dates + Meeting Details

Replace these placeholders each year.

1

Open Enrollment Opens

[Start Date]

3

Plan Year Begins

[Effective Date]

5

One-on-One Help

[Date / Time / Sign-up]

2

Open Enrollment Closes

[End Date / Time]

4

Benefit Meeting

[Date / Time / Location]

Deadline Reminder: After the enrollment window closes, changes usually require a qualifying life event.

What's Changing + What's Staying

Keep this clear, specific, and practical.

What's Changing

- [Plan / carrier changes]
- [Premium or contribution changes]
- [Deductible, copay, or coinsurance updates]
- [New or removed benefits]
- [Required employee action]

What's Staying the Same

- [Benefits or carriers continuing]
- [Eligibility rules continuing]
- [Company-paid benefits continuing]
- [Support resources still available]
- [Processes that remain the same]

Tip: Even if employees keep the same plan, remind them to review costs and coverage.

Before You Enroll

A little prep now prevents the last-day benefit tornado.

1 Dependents
Names, DOBs, SSNs if needed

2 Beneficiaries
Life insurance / retirement

3 Doctors + Clinics
Check network status

4 Medications
Review covered drugs and pharmacy costs

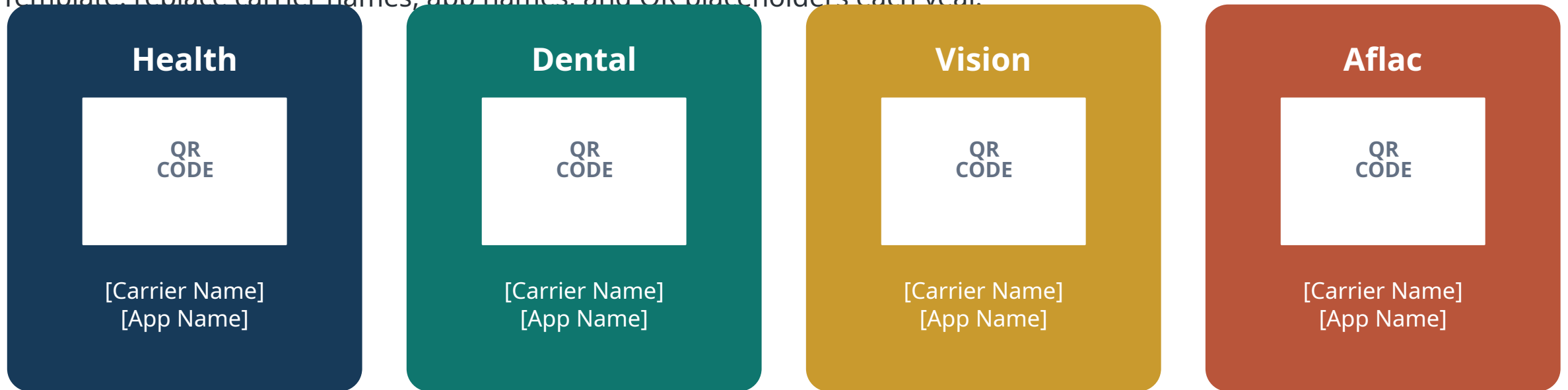
5 Login Info
Enrollment system username/password

6 Questions
Write down anything unclear

Bring: ID • dependent information • provider names • current prescriptions • questions

Benefits Apps at a Glance

Template: replace carrier names, app names, and QR placeholders each year.



Save these before you need them.

Benefits Contact Card

Health	Dental	Vision	Aflac
Carrier: [Company Name] Rep: [Name] Phone: [Phone Number] Website / Email: [Website / Email]	Carrier: [Company Name] Rep: [Name] Phone: [Phone Number] Website / Email: [Website / Email]	Carrier: [Company Name] Rep: [Name] Phone: [Phone Number] Website / Email: [Website / Email]	Carrier: [Company Name] Rep: [Name] Phone: [Phone Number] Website / Email: [Website / Email]

Questions about enrollment? Contact [HR / Benefits Contact] | [Phone / Email]

One-Page Benefits Clue Hunt

Prize entries: complete 8 clues = 1 entry • all 12 = 2 entries • bonus = extra entry.

1. Individual deductible: _____

2. Out-of-pocket maximum: _____

3. Coinsurance %: _____

4. One copay service: _____

5. Qualifying life event: _____

6. QLE reporting deadline: _____

7. Preventive service: _____

8. Provider search location: _____

9. Prescription cost/rule: _____

10. Company-paid benefit: _____

11. OE deadline: _____

12. When changes are allowed: _____

Bonus: Find one benefit, resource, discount, or service you did not know you had.

Benefits Bingo

U

Found my deductible	Checked beneficiary	Found OOP max	Provider search	Preventive service
Coinsurance	Reviewed dependents	Rx copay	OE deadline	Employer-paid benefit
QLE example	Premium cost	FREE: Reviewed Benefits	Ask HR question	Compare plans
Found a copay	When changes allowed	Doctor in-network	New benefit found	Dental review
Vision review	HSA/FSA rule	Deductible meaning	Life insurance	Learned something new

How it works: Complete a row, column, diagonal, or all four corners. Turn in for prize entries by [Deadline].

Did You Know? 1

A few quick benefit facts employees often miss.



Preventive Care

Many in-network preventive services may be covered at no cost.



Qualifying Life Events

Events like marriage, birth, divorce, or loss of coverage may allow changes.



In-Network Providers

Using in-network care can lower out-of-pocket costs.



Benefits Apps

Carrier apps can help employees access ID cards and claims.

Small facts. Big impact.

Did You Know? 2

Use these as weekly tips, posters, or email blocks.



Deductible

Amount generally paid before the plan shares some costs.



Copay

Fixed amount paid for certain covered services.



Coinsurance

Percentage of covered costs paid after deductible.



Out-of-Pocket Max

Limit on covered in-network costs during the plan year.

Small facts. Big impact.

What Would You Do?

Benefits scenario game. Use in meetings, emails, or as a freebie download.

Scenario Sample

An employee misses the Open Enrollment deadline and has no qualifying life event. What is likely?

- A. They may have to wait until next Open Enrollment
- B. They can enroll whenever they want
- C. The carrier will backdate it automatically
- D. Their manager can approve it

Answer Reveal

Best answer: A. Without a qualifying life event, they may need to wait until the next enrollment period.

Prize option: 4 correct = 1 entry • 8 correct = 2 entries.

Tips + Tricks Freebie Section

Ideas for your website, email nurture, or LinkedIn posts.

1

Tip #1

Review benefits even if you plan to keep the same election.

3

Tip #3

Save carrier apps and contacts before you need care.

5

Tip #5

Ask questions early, not on deadline day.

2

Tip #2

Check providers and medications before choosing a plan.

4

Tip #4

Update beneficiaries after major life changes.

6

Tip #6

Use prize entries to turn learning into participation.

Freebie Page Copy

Use this starter copy for a LeMay HR Consulting freebie or tips page.

Make Open Enrollment easier for your employees.

Download practical, ready-to-use HR resources designed to help employees understand benefits, ask better questions, and complete enrollment on time.

Suggested freebies: Benefits App Card • Clue Hunt • Bingo • Did You Know Messages • Scenario Game • Before You Enroll Checklist

Call to action: Get the free Open Enrollment Engagement Kit

Ready to Customize

Replace bracketed placeholders, add your company details, and publish the resources as PDFs, handouts, slides, or website freebies.

LeMay HR Consulting

Strategic HR • Compliance • Leadership
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