

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

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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