

USER GROUP SESSION SUMMARY

*Preparing for Open Enrollment Success
in UKG Pro*

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OVERVIEW:

This User Group session focused on effective open enrollment in UKG Pro Classic Benefits and Benefits Administration. Sability's presenters, Missi Domingue and Lynn Sacia shared key preparation best practices, tools and resources for a successful open enrollment.

SUMMARY:

Having a successful open enrollment often lies on effective preparation. As a best practice, organizations should meet with brokers as soon as possible to discuss any changes for the new plan year, decide on an active or passive enrollment, and the open enrollment election period dates. While these decisions may come later, it is a best practice to begin drafting employee communication plans, securing training for the open enrollment team, and determining if any service requests or technical assistance is needed. There are many tools to help prepare including UKG's Pending Effective Date Estimators, Evidence of Insurability resources, and Guided Renewal Tool.

TOP TIPS FOR SUCCESS:

- Start planning early with brokers and carriers
- Schedule open enrollment strategically and plan post-enrollment activities
- Ensure compliance and plan accuracy (ACA updates, rates, effective dates, EOI considerations)
- Define processes for managing life events during open enrollment
- Train administrators or outside vendors and leverage available resources, guides, and training



PRESENTERS



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**WATCH THE
SESSION RECORDING!**

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USER GROUP:

If you're interested in participating in our next User Group session, join our LinkedIn Group "[Sability UKG User Group](#)" or reach us at customersuccess@sability.com