Prepare for Open Enrollment Success

Start planning now to make the most of Open Enrollment.

Use this checklist to stay organized, connect with clients, and stay on track throughout the enrollment season.

60-30 Days Before Open Enrollment

- ☐ Review Open Enrollment deadline
  - ☐ On-Exchange January 15, 2027
- ☐ Complete certifications
  - ☐ 2027 Marketplace Certification
- ☐ Verify carrier appointments
- ☐ Review Carrier Plan Offerings
  - ☐ Sunsetting of plans
  - ☐ New plans
  - ☐ Provider changes
- ☐ Prepare marketing based on client categories
  - ☐ Renewal clients
  - ☐ Subsidy-eligible clients
  - ☐ SEP-eligible clients
- ☐ Bookmark essential websites
  - ☐ Producer Experience Portal
  - ☐ Blue Access for Producers℠
  - ☐ IFM Sales Tool Kit

Before Open Enrollment Begins

- ☐ Verify client contact information
- ☐ Maximize your enrollment window by scheduling your OE appointments before OE begins
- ☐ Remind clients the enrollment window dates
- ☐ Inform clients of documents needed for their appointment
- ☐ Gather required documents
  - ☐ Income verification
  - ☐ Immigration/citizenship documents (if applicable)
  - ☐ Household information
- ☐ Current coverage information

Open Enrollment – Existing Clients

- ☐ Review of current plan performance
- ☐ Verify income and household size
- ☐ Review subsidy eligibility
- ☐ Compare renewal options
- ☐ Confirm provider and prescription drug coverage

During Open Enrollment – New Clients

- ☐ Complete eligibility screening
- ☐ Estimate annual household income
- ☐ Review subsidy opportunities
- ☐ Present plan comparisons
- ☐ Obtain required consents and disclosures

Final Week Before Deadline – 12/7 through 12/11

☐ Contact clients with incomplete applications

    ☐ Resolve all Data Matching Issues

☐ Answer pending document requests

☐ Confirm submitted enrollments

☐ Address Marketplace or carrier issues immediately

☐ Send enrollment confirmations

After Open Enrollment

☐ Review and resolve all final Data Matching Issues

☐ Verify first premium payments and help set up

☐ Auto Bill Pay

☐ Assist with ID cards and account setup

☐ Remind clients to set up communication preferences in their member account

    ☐ Select language preference

    ☐ Chose how to get updates – email, text, paper mail

☐ Encourage clients to complete next steps:

    ☐ If enrolled in HMO, select a PCP

    ☐ Schedule annual wellness visit

    ☐ Identify nearest in-network urgent care and save facility name, phone number and location for non-life-threatening emergencies

    ☐ Complete health care check-in and review plan resources

    ☐ Bookmark Where to Go for Care webpage

☐ Schedule key follow-up touchpoints throughout the year

☐ Identify clients who may qualify for a Special Enrollment Period

A Few Simple Questions to Ask Yourself

☐ Have I contacted every client in my book of business?

☐ Do my clients know the enrollment deadline?

☐ Am I using email, text, phone, and social media to stay connected?

☐ Have I reviewed clients who may need additional support?

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