eBook

Winning Open Enrollment 2025:

A Practical Guide for HR Leaders
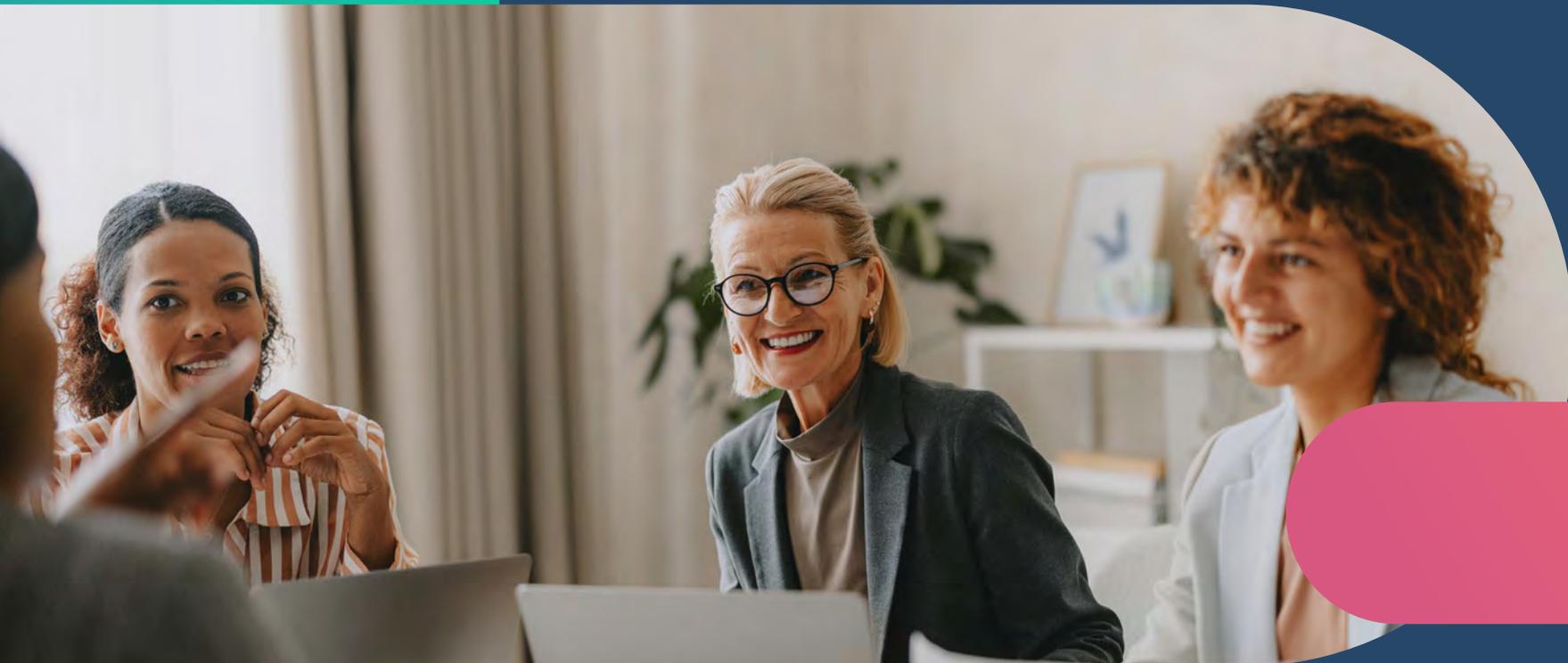
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This year feels different

Open enrollment has always been a high-stakes period for HR, but if you're feeling like 2025 has turned the pressure up to 11, you're not alone. We're seeing several challenges rising together: healthcare costs are climbing faster than wages, employee financial stress is at an all-time high, and the expectation on HR teams to do more with less continues to mount. With benefits remaining one of the most powerful tools for attracting and retaining talent, falling short during open enrollment doesn't feel like much of an option.

This guide is designed to help HR leaders understand these trends and make clear plans for a confident open enrollment in 2025. We'll show you how to create an experience that's easy to navigate, aligns with employee needs, and supports long-term organizational goals. With the right planning and partnerships, you can transform how you approach open enrollment and its impact on your employees and organization.

The following four chapters are focused on trends, each containing three parts:

1 **The reality** – the trends and challenges we are seeing

2 **The result** – the impact they have on employees and employers

3 **The response** – how you can rise to the occasion to overcome them

Then we'll cover benefits to consider adding to your total rewards package, administrative challenges organizations face, and open enrollment best practices. And if you're a Workday customer, you're in luck! To round out the guide, we have some handy checklists and reports you'll want to use around open enrollment.

Trend 1: Rising healthcare costs

The reality

Healthcare costs for employers increased around 8% in 2025, with per-employee costs expected to exceed $16,000. This is the highest increase we've seen in over a decade.

The result

HR and finance leaders are in a difficult position. How do you manage escalating expenses without sacrificing competitiveness or employee satisfaction? Rising costs also tend to bring more C-suite involvement into the benefits strategy (especially from CFOs stewarding the budget). Employers must decide whether to absorb more of the cost or shift some burdens to employees. This is a decision that can't be taken lightly, knowing that even the smallest increase in responsibility on employees can negatively impact satisfaction and retention.

The response

To respond effectively to rising healthcare costs, HR teams need more than cost-cutting tactics. They need a holistic strategy that balances financial stewardship with employee experience. The following approaches can help organizations contain spend while maintaining trust and delivering real value during open enrollment.

Reevaluate how plans are designed

Start by examining whether your current plan designs still meet the evolving needs of your workforce and your business. Adjusting deductibles, copays, or premiums can offer immediate cost containment, but it is important to assess the downstream impact on access and satisfaction. If you do not already offer tiered plan options, now may be the time. Plans that include both cost-conscious alternatives and more robust coverage allow employees to choose based on their personal risk tolerance and financial goals. At the same time, make sure you are emphasizing preventive care and wellness benefits. These investments can help reduce long-term claims while supporting overall employee health and productivity.

Double down on employee education

Benefit changes, especially those involving increased costs, can quickly lead to confusion or resentment if not clearly communicated. Employees do not need spin, but they do need context. Help them understand the reasoning behind plan adjustments and acknowledge the reality of rising healthcare costs. Transparency helps soften the impact and fosters trust. Make sure you are also explaining what steps the company is taking to mitigate costs where possible, such as subsidizing premiums or adding supplemental resources. Clear, honest communication goes a long way toward increasing employee understanding and engagement.

Promote value, not just cost

Cost is only one part of the benefits equation. Shift the focus from premiums alone to the broader value your benefits deliver.

Highlight programs that employees might not think about, such as **virtual care, mental health resources, or financial well-being tools,** that can make a real difference in day-to-day life. Reinforce the idea that benefits are an extension of total compensation.

Help employees see beyond paycheck deductions by framing benefits as an investment in their health, financial security, and quality of life.deductions by framing benefits as an investment in their health, financial security, and quality of life.

Work on your adoption plan

Even the best-designed benefits fall flat if employees do not understand or adopt them. Use your data to guide people toward plans that are both cost-effective and aligned to their needs. Decision-support tools can help employees feel more confident in their choices and reduce the number of default or misinformed selections. After enrollment, continue the conversation. Surveys and feedback loops can reveal lingering confusion, unmet needs, or pain points, giving you the insight needed to improve communications and offerings year over year.

Trend 2: Employees are feeling the squeeze

The reality

While insurance costs are rising by 5.8%,
wages are only projected to grow 3.3% in 2025.

The result

Many employees will feel like their take-home pay is shrinking, even if their salary increases. This widening gap has a real impact. Employees may begin to see benefits as a burden rather than a perk, especially if their premiums eat into their paychecks. That perception can erode morale, increase turnover, and diminish the perceived value of your rewards package.

The response

To effectively support employees during open enrollment, HR teams must go beyond simply listing available benefits. It's essential to provide context and help employees understand how these offerings fit into their broader financial and personal lives. The strategies below can guide HR leaders in ensuring benefits are not only accessible but also truly valued.

Trend 2: Employees are feeling the squeeze – continued

Ensure total compensation is visible

Help employees see the full value of what your organization provides. This includes more than just their salary.

Show how employer-paid benefits contribute to their overall compensation package. Elements like health coverage, **401(k) matching,** and well-being stipends can all be featured in total rewards statements.

Providing this information during open enrollment helps employees understand and appreciate the full investment being made in their financial and personal well-being.

Support financial well-being

Benefits decisions are an important part of an employee's overall financial planning. Support your workforce by offering tools and education around budgeting, saving, and making the most of tax-advantaged accounts such as HSAs and FSAs. These resources can help employees feel more confident and less stressed when selecting their benefits.

Consider offset strategies

If benefit costs are increasing, consider ways to lessen the impact on employees. Options might include covering a larger portion of premiums, providing a one-time contribution to an HSA, increasing the employer match on retirement plans, or offering wellness stipends. Even small gestures can go a long way in showing that your organization is aware of employee challenges and committed to helping.

Prioritize clarity over complexity

Confusing benefits information can lead to poor choices and unnecessary frustration. Make it easy for employees to understand the cost of each plan per paycheck and how to compare plan options based on real-life scenarios. Identify which tools or services are available at no cost or at a discount. Ensure employees know who to contact with questions and how to get support when they need it.

Train managers to talk about pay and benefits

Managers play an important role in reinforcing the value of benefits. Give them the tools to speak confidently about how benefits relate to compensation and well-being. While they may not need to answer every detail, they should know where to direct employees for support. This approach helps create a culture of clarity and trust across the organization.

Trend 3: Employee overwhelm can lead to wrong decisions

The reality

Employees spend an average of just <u>18 minutes reviewing benefits</u> during open enrollment. Many default to last year's selections, not because they're confident but because they're confused, busy, or overwhelmed.

The result

Employers invest in quality benefits, but if employees default or misunderstand their options, that investment goes unused or underappreciated. When employees select plans that aren't best suited to their situation, it can lead to financial stress, gaps in coverage, or avoidable out-of-pocket expenses. These can all directly impact productivity and satisfaction. Also, if employees consistently feel overwhelmed by the open enrollment process, they may start to disengage from HR communications altogether.

The response

For many employees, open enrollment feels like a once-a-year, high-stakes decision-making sprint. The more approachable and user-friendly you can make the experience, the more confident and informed your workforce will be. These strategies will help you turn open enrollment into a process employees understand, trust, and actively engage with.

Make benefits decisions feel more manageable

Rather than presenting open enrollment as a large, complex process, break it down into small, achievable steps. Reframing the experience this way reduces intimidation and encourages more active participation. Providing a clear roadmap, such as "3 steps to choosing your benefits" or "How to review last year's choices in 5 minutes," can make a big difference in helping employees take deliberate action.

Be personalized in your approach

Generic communications are easy to ignore. Tailor your messages to employee profiles by incorporating usage data, life stage considerations, or past benefit selections. Personalized videos, targeted messages, and thoughtful plan recommendations help employees feel seen and supported. Using multiple communication channels, such as email, SMS, internal messaging platforms, and videos, ensures your message reaches people where they are most likely to engage.

Break down the process visually

Lengthy documents and dense guides rarely capture attention. Visual tools like **infographics, interactive plan comparison charts, and 60-second explainer videos** can convey complex information quickly and clearly. These formats are more engaging and easier to digest, making it more likely that employees will understand their options and take meaningful action.

Be supportive and inspiring

Employees should feel empowered to make informed decisions, not pressured to pick the "right" plan. Reinforce that they can revisit their elections each year or during life events. Position HR as a partner in the process, not just an information source. Sharing real employee stories or positive statistics can help illustrate the value of thoughtful benefits decisions and inspire more proactive engagement.

Remind early and often

Employees frequently postpone benefits decisions due to stress or uncertainty. Start your communications at least a month in advance to give them time to absorb the information and ask questions. Spread out key messages with checklists, countdowns, and gentle nudges, rather than relying on a single deadline reminder.

Trend 4: Plans to retirement are on pause

The reality

According to a recent survey, nearly [40% of workers are considering delaying retirement](#) due to economic strain, while 30% have already changed or are considering changes to their retirement plans.

The result

If more employees delay retirement, employers may need to plan for shifting workforce demographics, healthcare needs, and phase retirement models. The choice to delay retirement is often tied to anxiety about financial stability, which also has an impact on morale and mental well-being. Employees may miss the connection between health benefits and retirement planning, even though both are long-term financial tools.

The response

Retirement readiness may not be top of mind for every employee during open enrollment, but the decisions they make now can significantly impact their long-term financial security. By weaving retirement planning into the open enrollment experience, HR teams can help employees connect short-term benefits selections with future goals. These strategies can improve both plan adoption and overall financial well-being across your workforce.

Trend 4: Plans to retirement are on pause – continued

Connect today's choices to tomorrow's goals

Encourage employees to take open enrollment seriously by explaining how plan choices made today can influence long-term financial outcomes. Reinforce that open enrollment is not just about selecting coverage for the year ahead. It is also an opportunity to build a foundation for future retirement readiness, especially when choosing plans that align with saving and investing goals.
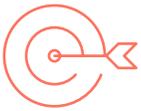
Bundle financial well-being into benefits

Help employees see the big picture by showcasing how various benefits work together to support financial stability. **This includes programs like 401(k) matching, HSA contributions, student loan repayment assistance, and access to budgeting tools or financial coaching.** These benefits should not be viewed as optional extras. Instead, position them as essential components of a holistic benefits package.

Create targeted messaging for different career stages

A one-size-fits-all approach does not work when it comes to financial planning. For employees nearing retirement, offer decision support focused on healthcare cost planning, transitioning to Medicare, and taking advantage of catch-up contributions.
For younger employees, emphasize the power of compound interest, HSA investment opportunities, and the importance of starting early. Tailored messaging increases engagement and helps each employee feel supported in their unique situation.

Normalize retirement conversations

Bring retirement planning into the open. Hosting pre-retirement planning webinars or informal Q&A sessions can provide clarity and spark action. Collaborate with your 401(k) provider to offer targeted education during open enrollment. Include practical tools like checklists to make the planning process easier and more accessible.

Track participation and follow up

Keep a pulse on your workforce's engagement with retirement savings programs. Use benefits data to identify employees who are not enrolled or who are contributing below the match threshold. Then follow up with personalized nudges to encourage action. This kind |of targeted outreach can lead to improved savings behavior and higher program utilization.

Reminders for open enrollment communications

Communication plays a central role in open enrollment success, but common pitfalls can quickly derail even the best-planned strategy. HR teams should keep several key reminders in mind to ensure messages are received, understood, and acted on by employees.

Recognize that information often gets lost or ignored. Long emails, dense PDFs, and hour-long presentations are rarely effective. Employees are busy, and if content is difficult to digest, they may disengage altogether. Instead, aim for concise, targeted messages delivered in a variety of formats. Short videos, infographics, FAQs, or brief email summaries can be far more impactful.
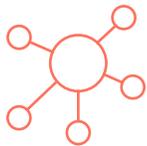
Centralize your resources. When documents, forms, and plan comparisons are scattered across systems or hidden in email threads, employees struggle to find what they need. Creating a dedicated open enrollment hub or microsite ensures that all information is housed in one accessible location. This reduces friction and supports better decision-making.

Address confusion proactively. Many employees fail to select the most beneficial plans because they don't understand their options or how those options apply to their needs. Clear explanations, decision-support tools, and plain-language guides can help bridge this gap. By anticipating questions and layering communication throughout the enrollment window, HR can reduce repetitive inquiries and improve overall engagement.

Extending the value of your benefits

When most employees think about open enrollment, their focus tends to stay on the core: medical, dental, and vision. But today's total rewards strategy is about more than just covering the basics. It's about meeting people where they are in their health, financial, family, and career journeys. A more modern suite of benefits can strengthen your employee value proposition, increase utilization, and improve engagement across the board.

In this chapter, we explore some increasingly popular and often overlooked benefits that HR leaders should consider incorporating or better promoting within their total rewards programs. Depending on your employee population, some of these benefits may be more valuable than others. Consider how the benefits below could improve employee well-being and satisfaction at your organization.

Supplemental health benefits

While medical coverage is foundational, additional health benefits can make a real difference when employees face serious health challenges.

Critical illness, accident, and hospital indemnity insurance – Especially impactful in industries with high physical risk (manufacturing, construction, logistics) and for employees with limited emergency savings.

Second option services – Valuable for organizations with a knowledge workforce or high-deductible health plans where employees take more responsibility for navigating care.

Financial well-being services

With employees across the board experiencing higher costs and higher rates of financial anxiety, financial well-being tools and services are relevant across nearly all industries.

Earned wage access (EWA) – Particularly helpful in hourly or shift-based workforces, such as retail, hospitality, and healthcare. Employees with experience in the gig economy are accustomed to receiving pay more frequently than the traditional biweekly schedule.

Student loan repayment assistance – Resonates the most with younger or mid-career professionals, and can be a strong differentiator in tech, finance, and education sectors. This is especially relevant now with the federal student loan repayment grace period ending in May.

Emergency savings account (ESA) – Universally relevant, but especially important in lower-wage industries or for first-time earners.

Financial coaching or digital planning tools – Effective across industries but best adopted when paired with other financial benefits.

Mental health and well-being support

Even before the pandemic, mental health awareness and support efforts were on the rise. Now, mental health support is a workplace expectation, but how you provide that support can vary greatly.

Mental health stipends or expanded employee assistance programs (EPAs) – Highly valued in high-stress professions, such as healthcare, social services, or tech.

Caregiver support – key for mid-career employees balancing childcare or elder care, and increasingly relevant across industries as costs for these services grow.

Sleep and stress management apps – easy to implement at scale for remote or hybrid teams and a good option for dispersed workforces.

Family-centric benefits

Family planning, extended parental leave, and childcare benefits can be huge recruitment draws. Though many can be costly for employers, they are also less expensive options that can still be quite impactful for talent recruitment and employee satisfaction.

Fertility and family – building assistance – Important for employers aiming to foster inclusivity or compete in talent markets where progressive benefits are expected.

Enhanced paid leave – Particularly impactful in countries or states where statutory leave is limited.

Childcare stipends or preferred provider networks – Essential for working parents and especially valued in urban centers where childcare access is limited.

Lifestyle and flexibility perks

There are many different lifestyle perks organizations can offer, with lots of opportunities to tailor to specific types of workforces. Here are a few of our favorites.

Lifestyle spending account (LSA) – Well-received in organizations with flexible work cultures or diverse employee interests.

Pet insurance – Increasingly popular with millennials and Gen Z.

Sabbatical programs – Best suited to companies with long-tenured employees or a strong focus on retention and career development.

Professional advancement and life milestones

Investing in employees' development and major life moments helps to build loyalty.

Professional development stipends – Highly appreciated in field that value ongoing education and certifications (tech, finance, legal).

Life event support – Important for large or diverse organizations where employees are likely navigating major transitions simultaneously.

Benefits navigation or concierge services – Great for organizations that offer multiple health plan options and a variety of additional benefits

Expanding your total rewards package

You don't need to roll out every benefit at once. Start by evaluating which options align with your workforce's demographics, needs, and strategic priorities. Even small additions, or simply better communication about what you already offer, can have a big impact. By broadening your total rewards strategy and aligning offerings with employee realities, you help employees see your benefits not just as a list of options, but as a system of support for all aspects of their lives.

Administrative challenges and opportunities

Open enrollment is as high stakes to HR as it is to employees. Managing timelines, ensuring accuracy, and staying compliant while fielding employee questions can stretch even the most prepared teams.

Here are **three of the biggest challenges HR teams** face and how you can overcome them.

Compliance

Of course, compliance tops the list. Managing ACA, COBRA, HIPAA, and other regulations can be especially complex during open enrollment, when data volumes and deadlines peak. Whether it's ensuring timely notices, tracking eligibility, or protecting sensitive data, compliance requires consistent attention and reliable documentation.

To stay confident and in control, establish a review cadence for regulatory tasks and keep a resource hub handy for quick reference. A few go-to sources include:

- **IRS ACA Information Center** – for employer ACA reporting requirements
- **HHS HIPAA for Professionals** – for security and privacy guidance
- **SHRM** – for timely updates and toolkits across all HR compliance areas
- **EBSA** – for oversight of retirement and health benefit plans

Even well-prepared teams benefit from bookmarking these trusted sites, especially when regulations shift or new deadlines emerge mid-cycle.
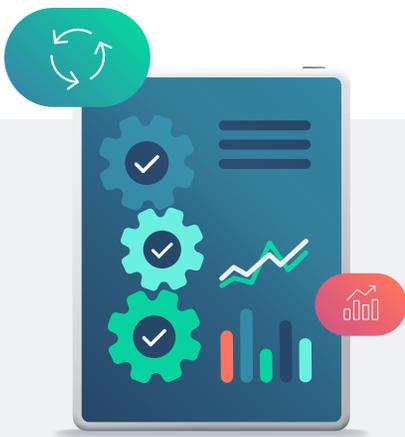
Data accuracy and system sync

Even minor data mismatches between your HCM, payroll, and carrier systems can create major headaches during open enrollment, ranging from incorrect deductions to delayed coverage for employees. With multiple parties touching the same data, it's easy for discrepancies to slip through the cracks.

Start with a pre-enrollment audit to identify any inconsistencies in key fields like employee eligibility, dependent status, plan assignments, and payroll deductions. Post-enrollment, perform spot checks on a sample of records to confirm that elections have flowed correctly between systems.

If possible, use automated data validation tools or integration logs to pinpoint errors early. Mapping out file feeds and timing can also help set expectations and avoid surprises during the first payroll run after open enrollment.

Internal communication planning

We've already discussed the importance of communicating open enrollment activities with employees and the different ways to do this. But there is a critical step that comes first.

Behind every smooth open enrollment is a well-coordinated internal effort. HR, finance, IT, and sometimes legal all play a role, but **without clear communication, delays and confusion can compound under open enrollment pressure.** It's not just about launching benefits to employees, it's about making sure everyone behind the scenes knows what's happening and when.

Kick things off with a cross-functional planning meeting to align on objectives, timelines, and responsibilities. Designate a point person from each team and create a centralized open enrollment tracker or dashboard to monitor readiness, open tasks, and progress. Clear documentation, like a shared calendar, escalation paths, or a checklist of dependencies, can prevent missteps and keep teams aligned when deadlines approach.

Best practices for HR teams in 2025

As open enrollment grows more complex, HR leaders must take a proactive and strategic approach to managing the process. From improving the employee experience to ensuring operational excellence behind the scenes, success depends on thoughtful planning and cross-functional coordination. The following best practices highlight key insights we've explored in this guide and offer a roadmap to help HR teams simplify enrollment, reduce risk, and drive better outcomes for employees and the organization alike

1

Align people, process & technology

- Hold a pre-open enrollment kickoff with HR, IT, payroll, and communications to define responsibilities and timelines.

- Document and version-control open enrollment procedures so institutional knowledge is preserved year over year.

2

Validate and sync your systems

- Verify that the integration mapping between your HCM, payroll, and carriers is up to date.

- Spot-check updates post-enrollment to confirm elections flowed correctly and deductions are accurate.

- Conduct internal audits before open enrollment begins and after it closes to ensure alignment across systems and vendors.

3

Stay ahead of compliance

- Review ACA reporting setup early to ensure accurate tracking of eligibility, offers, and affordability.
- Double-check that plan documents (SPDs), required notices (e.g., CHIPRA, Medicare Part D), and summary of benefits and coverage (SBCs) are current and accessible.
- Maintain HIPAA privacy protocols when handling sensitive employee data, especially if sharing across vendors.

4

Support your internal team

- Schedule "quiet hours" or blackout periods for focused processing and QA.
- Assign roles for triaging employee questions, data corrections, and issue resolution.

5

Centralize the information

- Create open enrollment microsites or internal portals housing all documents, forms, and tools in one place.
- Eliminate friction by consolidating resources and linking to tools employees actually use.

6

Simplify the experience

- Use clear language and short-form content (60-second videos, bite-sized FAQs).
- Focus on demystifying confusing elements like plan comparisons and cost-sharing terms.

7

Empower self-service

- Offer trustworthy decision-support tools to guide employees toward the right plan for their unique needs.

- Use explainer videos to address frequently asked questions.

8

Communicate early, often, and visually

- Develop a multi-week communications calendar using short, visual content.
- Use infographics, animations, and single-topic spotlights to avoid information overload.

Additional insights for Workday customers

Workday is a powerful platform for managing benefits and driving a more efficient, employee-friendly open enrollment experience. You can configure benefit plans, manage eligibility, automate communications, and ensure clean handoffs to payroll and carriers, all in one place.

But even with the best tools, open enrollment still takes time, coordination, and expertise. That's where OneSource Virtual (OSV) comes in. As a Workday partner with deep operational experience, **OSV helps you get the most out of your system by taking on the heavy lifting,** from configuration and validation to testing and reporting directly in Workday. Whether you're updating eligibility rules or managing file feeds to carriers, OSV ensures your open enrollment is compliant, complete, and a whole lot less stressful for your entire organization.

To help you make the most of Workday during open enrollment, we've compiled a comprehensive checklist along with a set of key reports you can use to monitor success at every stage.

Workday Open Enrollment Preparation Checklist

Eligibility Configuration

, Update/review benefit eligibility rules

, Configure benefit groups

, Set up dependent eligibility rules

, Run eligibility rules audit

, Review eligibility rules results

, Run benefit group audit to ensure employees aren't in multiple groups

, Verify select employees using the Benefits Eligibility by Benefit Group report

, Update electronic signature text

Provider and Event Configuration

, Add all new benefit providers (if applicable)

, Communicate changes to the Integrations Team

, Review/update benefit coverage types

, Create/review Open Enrollment event type

, Update enrollment events restricted by reasons (if new business processes added)

, Review/edit Days to Enroll for coordination of events (both Open Enrollment and Benefit Event Types)

Financial Setup

- Create/update deduction codes for benefit plans
- Create/update earnings codes for benefit plans
- Create/update earnings codes for credits
- Create/update period schedules for the full benefit plan year (required for FSA/HSA calculations)

Health Care Plans

- Update/review health care classifications
- Update/review health care coverage targets (required for HSA plans)
- Create new plan definitions if needed
- Update/review rates, credits, or spousal surcharge for existing plans (use correct effective date)

Account-Based Plans

Savings Account Plans

- Create new plan definitions if needed
- Update/review plan limits

Spending Account Plans

- Create new plan definitions if needed
- Update/review plan limits

Retirement Savings Plans

- Create new plan definitions if needed
- Update/review plan limits if necessary

Insurance Plans

- Create/review insurance coverage targets
- Create/update/review amount coverage levels
- Create/update/review multiplier coverage levels
- Create/update/review percent coverage levels
- Create/update/review insurance coverage - amount
- Create/update/review insurance coverage - multiplier
- Create/update/review insurance coverage - percent
- Create/update/review insurance rates and credits

Additional Benefits

, Create/update/review additional benefit coverage targets

, Update/review rates or credits for existing plans (use correct effective date)

, Update/review plans with individual rates

, Configure web service for individual rates (if applicable)

Plan Year Configuration

, Create/update benefit plan year with applicable benefit plans

, Update/review other benefit plan years (if applicable)

, Create/update rolling plan year (include plans not in OE that shouldn't end at year-end)

Enrollment Configuration

, Update enrollment instruction text by benefit group and/or benefit event

, Update/review tobacco use question and tobacco default response

, Configure benefit mapping if mapping plans from old to new plan year

, Update/review enrollment event rule with Open Enrollment event

    , Include "On the Event Date" for Coverage Begin on Start or Waive Coverage tab

    , Include EOI tabs for rules during Open Enrollment

    , Configure Coverage Rules tab

Cross-Plan Rules

- Create/update/review enrollment prerequisite rules
- Create/update/review insurance maximum rules
- Create/update/review insurance percentage rules
- Create/update/review retirement savings contribution maximum rules

Rate and Wellness Configuration

- Update/review benefit annual rates if necessary
- Configure web service for benefit annual rates (if applicable)
- Update/review wellness data if necessary
- Configure web service for wellness data (if applicable)

Defaults and Credits

- Configure benefit credits and associate to benefit group (if applicable)
- Add/update/review health care defaults
- Add/update/review insurance defaults
- Add/update/review retirement savings defaults
- Add/update/review additional benefit defaults

Final Validation

- Run final eligibility audits
- Test enrollment process for sample employees
- Verify all configurations are effective as of the plan year start date

Workday reports to gauge open enrollment success

Pre-Open Enrollment (2–4 weeks before launch)

Goal: Validate setup, eligibility, and data integrity before employees begin enrolling.

Key Reports to Run:

- **Open Enrollment Event Setup Summary**
  - Confirm all open enrollment events are correctly configured and assigned.

- **Eligibility Reports by Benefit Group**
  - Check that employees are mapped to the right plans and coverage levels.

- **Dependent Audit Report**
  - Clean up dependent data (such as missing birthdates or SSNs) to avoid enrollment errors.

- **Employee Benefits Elections (Prior Year)**
  - Review historical elections to forecast plan usage or set defaults.

- **Integration Event Status / Test Runs**
  - Validate that outbound files to carriers are mapping and sending correctly.

During Open Enrollment

Goal: Monitor engagement, troubleshoot issues, and ensure employees complete tasks.

Key Reports to Run:

- **Open Enrollment Event Status Summary**
  - Daily or weekly review to see who hasn't started or completed enrollment.

- **Open Enrollment Participation Rate**
  - Track the percentage of eligible employees enrolled.

- **Benefit Plan Participation Report**
  - Check for low adoption of key plans that may need more communication.

- **Integration Monitoring (for real-time feeds)**
  - Ensure enrollment changes are flowing to carriers correctly.

- **Help Desk Metrics (optional)**
  - If using Workday Help or another support channel, track top questions/issues to inform comms.

Post-Open Enrollment (1–2 weeks after close)

Goal: Validate accuracy, fix mismatches, and begin preparing for payroll and carrier transmission.

Key Reports to Run:

- **Benefits Enrollment Elections Summary**
  - Review and verify that elections match expectations.
- **Payroll Results for a Period (Preview)**
  - Confirm benefit deductions are calculated correctly before the first payroll run.
- **Benefit Provider Integration Log**
  - Ensure carriers received updated data for all participants.
- **Open Enrollment Event Audit Log**
  - Validate that all events closed successfully and no elections are missing.
- **Custom Utilization Dashboard (if available)**
  - Share completion rates, plan trends, and open enrollment metrics with leadership.

Make the most of open enrollment

Open enrollment will always come with complexity. But with the right strategy, tools, and support, complexity doesn't have to mean chaos. In fact, it can become one of the most impactful moments on your HR calendar. It's a time to reinforce your company's commitment to employee well-being, strengthen trust, and connect benefits decisions to what matters most.

Throughout this guide, we've explored how to **simplify the employee experience, improve internal operations, leverage Workday's powerful tools, and drive smarter, more confident decision-making.** Whether you're navigating rising costs, expanding your offerings, or fine-tuning communications, the goal remains the same: to make open enrollment easier, more effective, and more valuable for everyone involved.

And you don't have to do it alone. With OneSource Virtual by your side, you gain a team of experts who know Workday inside and out and who are ready to help you manage the details, reduce the burden on your team, and deliver a smooth, successful enrollment season.

This year, don't just get through open enrollment — lead it with clarity, confidence, and impact.

About OneSource Virtual

OneSource Virtual (OSV) delivers in-tenant technology and expert services to automate the administrative, transactional tasks of payroll, taxes, payments, and benefits within Workday. OSV has worked exclusively with Workday customers for the past 15 years with a services team that averages 10 years of Workday experience in addition to 20 years of industry experience. With over 1,100 customers, 95% retention, and $185+ billion in treasury movement annually, OSV helps organizations take their teams from transactional to transformational.

Want to learn more about our employee services?
Contact us