

CHECKLIST

Employee Enrollment Checklist

Everything to gather and review before, during, and after enrollment.

BEFORE YOU START

- ☐ Know your **enrollment window and deadline** — mark it on your calendar
- ☐ Gather **dependent information** (legal names, dates of birth, Social Security numbers)
- ☐ Review your **current elections** and note what's changed this year
- ☐ List your regular providers, prescriptions, and expected care needs

AFTER YOU SUBMIT

- ☐ Save or print your **confirmation statement**
- ☐ Check your first pay period to confirm deductions match your elections

WHILE YOU'RE ENROLLING

- ☐ Log in to your **enrollment portal** using the link from your employer
- ☐ Compare plan options side by side — premium, deductible, and out-of-pocket costs
- ☐ Add or update **dependents and beneficiaries**
- ☐ Review optional coverage (dental, vision, life, disability) even if you skipped it before
- ☐ Ask a question — Summit Sherpa and your HR team are there to help before you submit
- ☐ Note who to contact for a **qualifying life event** (marriage, birth, loss of other coverage)
- ☐ Set a reminder for next year's open enrollment

Keep a copy of your confirmation statement — it's your record of what you elected and when.