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# The **Choice Plus Plan** with a Health Savings Account (HSA)

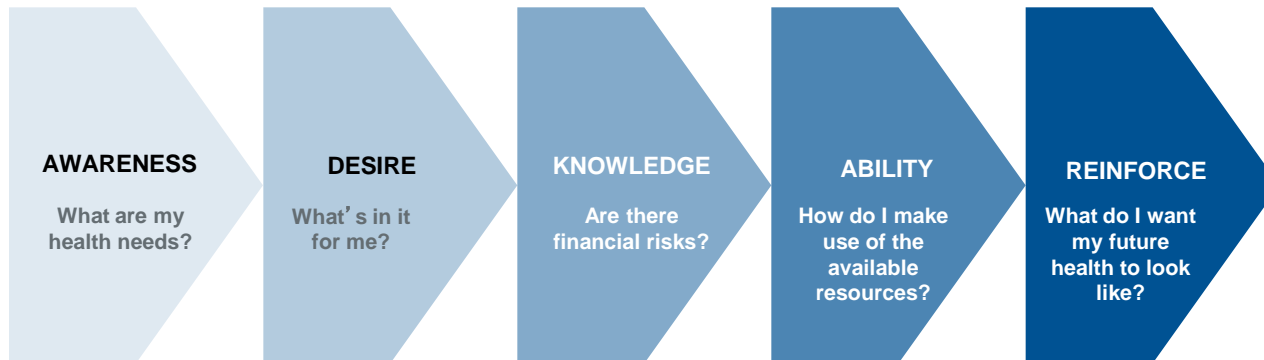
## 3-month Pre- and Open Enrollment Communications Calendar

Use this calendar as a helpful roadmap for providing your employees with useful, compelling communication pieces leading up to Open Enrollment.

# Change Management Foundation

## Understanding the engagement philosophy\*:

Success requires delivering consistent information, tools and support – through channels that your employees use naturally.



### Consider these tips before you begin your communications campaign.

1. Understand that success takes time. Change takes time. Your employees may be apprehensive and critical of the change. It's ok – it's natural.
2. Encourage your leaders to "walk the walk." They should embrace the change first and be aligned in how they make the case. Employees need to trust them.
3. Make it a priority to hold employee meetings. Don't assume employees will understand and get behind the change with a few emails. Change can be very personal for them.
4. Embrace technology. Studies continue to show that young workers and Boomers alike want online tools and web communications. Be sure to engage your Information Technology (IT) person/team.

\*The Prosci® ADKAR® Model was developed by Prosci Inc., the world leader in research and content creation in the field of change management.

3+ months before OE

# Pre-enrollment

|  | 3+ months before OE<br>(i.e. July) | 2 months before<br>(i.e. August) | 1 month before<br>(i.e. September) | Notes for HR |
|--|------------------------------------|----------------------------------|------------------------------------|--------------|
|--|------------------------------------|----------------------------------|------------------------------------|--------------|

**Pre-enrollment:** *Introductory communications to help educate your employees about the new plan.*

|                    |   |  |  |  |
|--------------------|---|--|--|--|
| <p>Direct mail</p> | <p>Send memo or letter to introduce new health plan.</p>                            |  | <p><b>CONSIDER:</b> mailing a postcard to remind of the new plan. (\$\$)</p>             | <p>The CEO/owner memo is key to the communication process. Be sure they agree to it and sign. Feel free to edit as you need. <b>Note:</b> See <u>cost estimates</u> to mail postcards.</p> |
| <p>Email</p>       | <p>Send 1<sup>st</sup> email days after the memo to introduce <u>microsite</u>.</p> | <p>Send 2<sup>nd</sup> email that include educational Brainsharks.</p> | <p>Send 3<sup>rd</sup> email to promote meetings or send 2<sup>nd</sup> email again.</p> | <p>Use emails early to help build awareness and interest. We made them easy for you to edit. <b>Don't underestimate the value of employee meetings.</b> We can help.</p>                   |
| <p>Web</p>         | <p>Add link to <u>hsa plan website</u> from company intranet site.</p>              | <p>Post link to <u>Health Care Lane</u> to company intranet site.</p>  |  | <p>Make available where most employees can see them. Recommend adding to company intranet site and promoting in company newsletter.</p>  |
| <p>Print</p>       |   |  | <p>Order brochures and FAQs for upcoming meetings.</p>                                   | <p>Print and distribute in break rooms or places where employees will see.</p>   |

Includes video












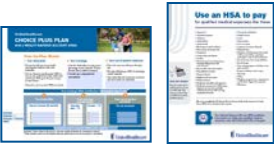

1 month before OE

# Open Enrollment



| 3+ weeks before OE<br>(i.e. September) | 2 weeks before<br>(i.e. October) | OPEN ENROLLMENT<br>(i.e. October) | Notes for HR |
|--|----------------------------------|-----------------------------------|--------------|
|--|----------------------------------|-----------------------------------|--------------|

**Open Enrollment:** Continue to build knowledge and confidence so they can take action by enrolling.

|  |  |   |  |   |
|--|--|---|--|---|
| <br>Direct mail |  | <p><b>CONSIDER</b> mailing a postcard to remind about OE and to attend a presentation.</p>  | <p>It's not cheap to do home mailings - but they work. This is especially true if trying to reach the key health care decision-maker. Contact your account rep for assistance.<br/> <b>Note:</b> See <a href="#">cost estimates</a>.</p> |   |
| <br>Email       | <p>Send 3<sup>rd</sup> email to remind about OE and promote presentations.</p>                        | <p>Send 4<sup>th</sup> email to urge plan comparing and opening HSA.</p>                    | <p><b>Send 5<sup>th</sup> email to encourage enrollment and to open HSA.</b></p>    | <p>After presentations, share the <a href="#">recap flier</a>. Remind employees to look for their doctor, use the plan cost tools and calculators on <a href="http://welcometouhc.com">welcometouhc.com</a></p> |
| <br>Web         | <p>Hold <u>meetings</u>. <b>CONSIDER</b> web meetings if there are employees working remotely.</p>  | <p>Hold <u>meetings</u>.</p>    | <p>Link to Enrollment Form and <a href="#">HSA Application</a>.</p>    | <p>Invite spouses to meetings. They may be the key health care decision maker. If you need presentation support, contact your account rep.</p>  |
| <br>Print     | <p>Distribute brochures and fliers at meetings.</p>   | <p><b>CONSIDER</b> distributing People Like Me fliers and other fliers.</p>               | <p>Distribute Enrollment Form and <a href="#">HSA Application</a>.</p>   | <p>Use the "People Like Me" fliers in the <a href="#">HSA Library</a> to show how the HSA can work for different people.</p>  |

 Include video
  In-person meetings
  Web meetings

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Insurance coverage provided by or through UnitedHealthcare Insurance Company or its affiliates.  
Administrative services provided by UnitedHealthCare Services, Inc., or their affiliates.

This UnitedHealthcare plan with Health Savings Account (HSA) is a high deductible health plan (HDHP) that is designed to comply with IRS requirements so eligible enrollees may open a Health Savings Account (HSA) with a bank of their choice or through Optum Bank<sup>SM</sup>, Member of FDIC. The HSA refers only and specifically to the Health Savings Account that is provided in conjunction with a particular bank, such as Optum Bank, and not to the associated HDHP.

Health savings accounts (HSAs) are individual accounts offered by Optum Bank, Member FDIC, and are subject to eligibility and restrictions, including but not limited to restrictions on distributions for qualified medical expenses set forth in section 213(d) of the Internal Revenue Code. State taxes may apply.

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