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

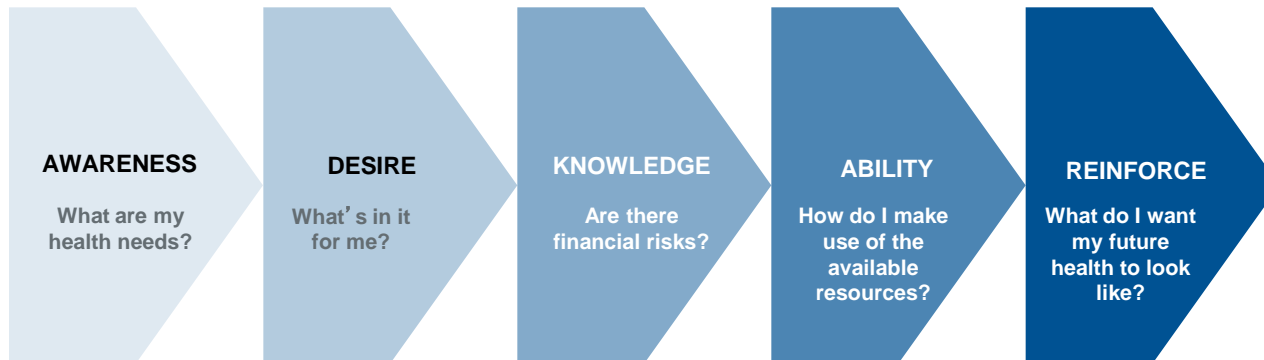
6-month Pre- and Open Enrollment Communications Calendar

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.

**6+ months
before OE**

Pre-enrollment

	6+ months before OE (i.e. April)	5 months before (i.e. May)	4 months before (i.e. June)	Notes for HR
Pre-enrollment: <i>Introductory communications to help educate your employees about the plan.</i>				
<p>Direct mail</p>	<p>Send memo or letter to introduce new health plan.</p>	<p>CONSIDER mailing a postcard early to build awareness. (\$\$)</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. Note: See <u>cost estimates</u> to mail postcards.</p>
<p>Email</p>	<p>Send <u>1st email</u> days after the memo.</p>	<p>Send <u>1st email</u> again to encourage visits to <u>HSA plan website</u>.</p>	<p>Consider sending an email to introduce <u>Health Care Lane</u>.</p>	<p>Use emails early to help build awareness and interest. If you have 1,000 eligible EEs, you can have a customized Health Care Lane site. Just complete this online <u>request form</u>.</p>
<p>Web</p>		<p>Add link to <u>HSA plan website</u> from company intranet site.</p>	<p>Consider posting a link to <u>Health Care Lane</u> on intranet site.</p>	<p>We recommend adding links to these sites from your company intranet site. Consider promoting the sites in an employee newsletter.</p>
<p>Print</p>			<p>Consider ordering and distributing the <u>Health Care Lane Map</u>.</p>	<p>Print and distribute the map in break rooms or areas with good employee traffic. A poster is also available. Ask your account rep for help.</p>

Includes video

3+ months before OE

Pre-enrollment

	3 months before OE (i.e. July)	2 months before (i.e. August)	1 month before (i.e. September)	Notes for HR
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Pre-enrollment: Continuing with communication to further educate your employees about the plan.

<p>Direct mail</p>			<p>CONSIDER mailing a postcard to promote meetings. (\$\$)</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. Note: See cost estimates.</p>
<p>Email</p>	<p>Send <u>2nd email</u> that include educational Brainsharks.</p>	<p>Send <u>2nd email</u> again. Edit to include this video. CONSIDER holding live meetings.</p>	<p>Send 3rd email to promote meetings.</p>	<p>Emails are a good way to keep communications simple. We made them easy for you to edit. Don't underestimate the value of employee meetings. We can help.</p>
<p>Web</p>			<p>Be sure you promote hsa plan website</p>	<p>If you have 1,000 eligible EEs, request a custom, welcometouhc.com site. We recommend linking to it from your company intranet.</p>
<p>Print</p>			<p>Order brochures and FAQs for upcoming meetings.</p>	<p>Print and distribute brochures, fliers in break rooms or where employees will see. Use the "People Like Me" fliers in the HSA Library to show how the HSA works for different people.</p>















Includes video

1 month before OE

Open Enrollment

3 weeks before OE (i.e. September)	2 weeks before (i.e. October)	OPEN ENROLLMENT (i.e. October)	Notes for HR
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Open Enrollment: *Building upon the knowledge you've shared and giving employees confidence to take action and enroll.*

 Direct mail		<p>CONSIDER mailing a postcard to remind about OE coming up.</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. Note: See cost estimates.</p>	
 Email	<p>Send <u>4th email</u> to urge plan comparing and opening HSA.</p>  	<p>Send <u>4th email</u> again. CONSIDER adding the plan decision <u>checklist</u>.</p>	<p>Send <u>5th email</u> to encourage enrollment and to open HSA.</p>  	<p>After presentations, share the <u>recap flier</u>. Remind employees to look for their doctor, use the plan cost tools and calculators on welcometouhc.com.</p>
 Web	<p>Hold <u>meetings</u>. CONSIDER web meetings if there are employees working remotely.</p> 	<p>Hold <u>meetings</u>.</p> 	<p>Link to Enrollment Form and <u>HSA Application</u>.</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>
 Print	<p>Distribute brochures and fliers at meetings.</p> 	<p>CONSIDER distributing People Like Me fliers and other fliers.</p> 	<p>Distribute Enrollment Form and <u>HSA Application</u>.</p>	<p>Use the <u>HSA Library</u> if you are looking for additional print support.</p>

 Include video
  In-person meetings
  Web meetings

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 BankSM, 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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