

Open Enrollment Checklist for Business Managers and Directors of Administration

1. Make sure every benefits-eligible employee has been entered into MyEnroll.com along with a valid work (preferred) or home email address before Open Enrollment begins on November 3, 2026.

Any time an email address is entered/updated in MyEnroll.com, the employee will receive an email from security@myenroll.com prompting him/her to verify the email and set up a username and password. Please let your employee(s) know that the email is coming and it is not spam.

2. Make sure every benefits-eligible employee has *verified* his/her email in MyEnroll.com and has set up a Username and Password.

If an employee is having trouble setting up a username and password, please ask them to contact the BAS/MyEnroll.com Support Team at service@myenroll.com or 800-945-5513.

To see who has/has not verified their email, login to MyEnroll.com, click on Menus, then Reports, then *Census Report with Pending Emails*.

3. Remind your benefits-eligible employees that they will receive an email from ArchdioceseofMilwaukee@MyEnroll.com on November 3 announcing the start of our Open Enrollment for Plan year 2027. They will have until midnight on November 17 to login to MyEnroll.com, review and update their personal information, and select or waive their benefits.

IMPORTANT: THIS IS AN ACTIVE OPEN ENROLLMENT AND ALL BENEFITS ELIGIBLE EMPLOYEES MUST PARTICIPATE.

Please emphasize the importance of checking and updating all personal information for themselves and their dependents, *paying special attention to birth dates, Social Security numbers, and home addresses*.

4. Be sure the correct pay schedule is noted for each employee so that the correct per-pay premium share is noted in MyEnroll.com. To see if any corrections need to be made, download the Census Salary Report (i.e., go to Menus, Reports, Census Salary Report). To make an update, go to the employee's profile page in MyEnroll.com, click on Employment, then Edit next to Pay Schedule.
5. Remind your employees that benefits documents are available for review in the Library under Quick Links in MyEnroll.com and provide them with a summary of Plan changes (optional) along with *their premium share noted* (see, Customizable Benefits Summary Page for 2027 and Excel Spreadsheet for Rate Calculations).

6. Ask each employee to print a copy of their enrollment/waiver confirmation for themselves and for you.
7. Ask each employee *who elects spousal coverage* (i.e., EE+Spouse or Family coverage) to complete and return *to you* the affidavit stating that their spouse does not have access to his/her own employer-sponsored coverage.

To determine who needs to submit an affidavit to you, after open enrollment closes, login to Myenroll.com, click on Menus, Reports, then Post Open Enrollment Coverage Change Report OR Open Enrollment Deduction Change Report and note who elected EE+Spouse or Family coverage. Save the affidavits and make a list of who elected spousal coverage *but did not provide you with an affidavit*. That list must be sent to Angie Doney at healthinsurance@archmil.org or Maureen Wurster at wursterm@archmil.org by November 20.

Note: You will also need to keep a list of these employees so that you can adjust their payroll deductions accordingly.

8. Ensure all your benefits-eligible employees have completed their Open Enrollment. To check, login to MyEnroll.com, click on Menus, then Reports, then Employee Open Enrollment Progress (EO Wizard).
9. When Open Enrollment ends, login to MyEnroll.com, click on Menus, then Reports, then Open Enrollment Deduction Change Report. The changes your employees made along with the new payroll deduction amounts for 2027 will be noted here.

Note: Medical, dental, and vision premiums should be deducted pretax (i.e., if you have a Section 125 plan or Section 125 POP plan in place). The spousal surcharge should also be deducted pretax. All other deductions should be after tax.

10. Review the January invoice from Benefit Allocation Systems as a “double check” to ensure your employees are enrolled in the proper coverage, and that you are being billed correctly.
11. A word about ID Cards. Current SRHP members will not receive new UHC, CVS/Caremark, or Delta Dental ID cards for Plan Year 2027. There is no ID card for DeltaVision unless requested. Instructions on how to request an ID card are posted in the Library under Vision in MyEnroll.com.