Open Enrollment
Email Templates

WEX™

Creating open enrollment emails can be an overwhelming task.

From key dates to online enrollment portal links, there is often a lot of information to convey through a medium that typically receives a very short attention span. So, where do you begin? What qualities are important in an open enrollment email, and how do you know when your email is successful?

Don't worry—we'll make this easy for you. Use this document as a guide for creating several different types of open enrollment emails. By the end of this guide, you'll be well-equipped to send an email that:

- Communicates key instructions for open enrollment

- Enhances enrollment participation

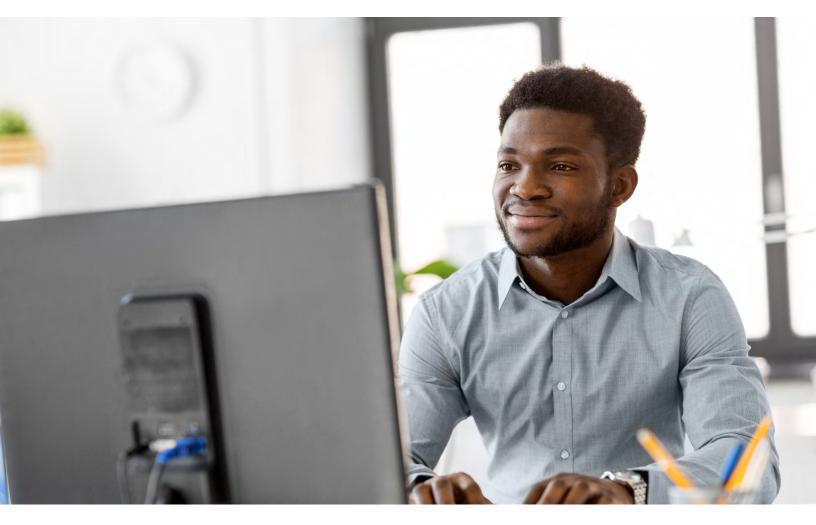- Empowers employees to make informed benefits decisions

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Open Enrollment Email Tips:

- Open enrollment emails allow for you to incorporate your company culture. Make these emails professional and informative, but don't be afraid to add some 'fun' where you can.

- First name personalization is always a nice touch.

- If you have internal social media, incorporate your open enrollment theme into your posts! Common reminders are bound to keep your employees proactive.

- Supplement emails with printed posters in the break room or lunchroom. A quick 'Don't Forget to Enroll' poster on the refrigerator will help ensure your employees don't miss their enrollment period — especially for those who don't access a computer regularly throughout the workday.

- When sending reminder emails, consider adding a countdown! This is an easy way to create urgency and provide constant reminders throughout the enrollment period.

- Check out our **Benefits buzz blog** for more open enrollment tips.

Keep Employee Benefits Enrollment Simple

Open enrollment marks the climactic point of all the hard work your HR department has put in to develop benefits offerings to your employees. Effective benefits communication has never been more crucial to achieving a successful open enrollment. By using these email samples, you are providing your employees the materials they need to be proactive when it comes time to enroll in benefits.

Go the Extra Mile

Experience relief from the responsibility of open enrollment communication and leave email announcements and reminders to us! Our communications team can craft tailored, branded messaging, and our benefits administration software, My Benefit Express™ can automatically send customizable emails to your entire population or a specific group of employees. You can even include confirmation statements and attach relevant forms or documents.

Contact a consultant to learn more about how WEX can help amplify your open enrollment communication strategy today.

Open Enrollment Email Template

Subject: Action Required: 20XX Annual Enrollment Has Begun!

Hello **[FIRST NAME]**,

[COMPANY] proudly offers a comprehensive and competitive benefits program and we encourage you to take advantage of the many benefits choices offered to you and your family. *(Consider using a bullet point list here to highlight any new or important benefit offerings).* Your enrollment period is **[MONTH] [DAY]**, **[YEAR]** – **[MONTH] [DAY]**, **[YEAR]**.

This is the time to choose your benefits for the upcominag year. You must complete the annual enrollment process in order to elect benefits. **Your 20XX benefit selections WILL NOT roll over to 20XX**.

It's easy to enroll:

1. Go to **[WEBSITE]**.

2. Enter your username and password.

    a. **[USE THIS SPACE FOR USERNAME INSTRUCTIONS]**

    b. **[USE THIS SPACE FOR PASSWORD INSTRUCTIONS]**

3. Follow the prompts to make your benefit selections for 20XX.

4. Review your selections and dependent elections, then **[INSERT ACTION TO TAKE]** to complete enrollment.

Reminder: You will need the date of birth and Social Security number for each of your dependents (if applicable). These are required to enroll them in eligible benefits and to complete your beneficiary designation.

Please remember to print a copy for your records. If you need to change any information, simply **[INSERT INSTRUCTIONS FOR MAKING CHANGES HERE]**.

If you have any questions or concerns, please contact us at **[PHONE NUMBER]** between the hours of **[INSERT HOURS]**. Or, send an email to **[EMAIL ADDRESS]**.

[SIGNATURE]

Note to HR Leaders:

Don't forget to attach or link to any educational materials, such as a Benefits Guide, that your employees may need for a smooth enrollment process!

Open Enrollment Email Reminder Template

Subject: Reminder! Open Enrollment Ends **[MONTH] [DAY]**

Hello **[FIRST NAME]**,

Your benefits package awaits! Don't forget to enroll as open enrollment for 20XX ends on **[MONTH] [DAY]**.

Reminder: You need to complete the annual enrollment process in order to elect benefits. Your 20XX benefit selections WILL NOT roll over to 20XX.

To enroll in your benefits, please log-in here, **[WEBSITE]**.

- **[USERNAME INFO]**
- **[PASSWORD INFO]**

If you have any questions or concerns, please contact us at **[PHONE NUMBER]** between the hours of [INSERT HOURS]. Or, send an email to **[EMAIL ADDRESS]**.

[SIGNATURE]

Note to HR Leaders:

Don't forget to attach or link to any educational materials, such as a Benefits Guide, that your employees may need for a smooth enrollment process!

Open Enrollment Email Template

Subject: 20XX Annual Enrollment Has Begun!

Hello **[FIRST NAME]**,

[COMPANY] proudly offers a comprehensive and competitive benefits program and we encourage you to take advantage of the many benefits choices offered to you and your family. *(Consider using a bullet point list here to highlight any new or important benefit offerings).* Your enrollment period is **[MONTH] [DAY]**, **[YEAR]** – **[MONTH] [DAY]**, **[YEAR]**.

Please review your current elections.

You have the opportunity to make changes to the benefits that you are currently enrolled in and also have the option to enroll in additional benefits.

Keep in mind — your current elections will carry over if you don't make a change, with the exception of **FSA and HSA accounts,** which doe require an active election to continue beyond the end of this plan year.

It's easy to enroll:

1. Go to **[WEBSITE]**.
2. Enter your username and password.
    a. **[USE THIS SPACE FOR USERNAME INSTRUCTIONS]**
    b. **[USE THIS SPACE FOR PASSWORD INSTRUCTIONS]**
3. Follow the prompts to review your existing benefit selections.
4. Confirm your selections, review dependent elections, and then **[INSERT ACTION TO TAKE]** to complete enrollment.

Reminder: You will need the date of birth and Social Security number for each of your dependents (if applicable). These are required to enroll them in eligible benefits and to complete your beneficiary designation.

Please remember to print a copy for your records. If you need to change any information, simply **[INSERT INSTRUCTIONS FOR MAKING CHANGES HERE]**.

If you have any questions or concerns, please contact us at **[PHONE NUMBER]** between the hours of **[INSERT HOURS]**. Or, send an email to **[EMAIL ADDRESS]**.

[SIGNATURE]

Note to HR Leaders:

Don't forget to attach or link to any educational materials, such as a Benefits Guide, that your employees may need for a smooth enrollment process!

Open Enrollment Email Reminder Template

Subject: Reminder! Open Enrollment Ends **[MONTH] [DAY]**

Hello **[FIRST NAME]**,

Open enrollment for 20XX ends on **[MONTH] [DAY]**. Keep in mind - your current elections will carry over if you don't make a change, with the exception of **FSA and HSA accounts**, which do require an active election to continue beyond the end of this plan year.

[INCLUDE ANY EXCEPTIONS HERE].

To review existing elections, make changes, or enroll in additional benefits, please log-in here, [WEBSITE].

- **[USERNAME INFO]**

- **[PASSWORD INFO]**

If you have any questions or concerns, please contact us at **[PHONE NUMBER]** between the hours of [INSERT HOURS]. Or, send an email to **[EMAIL ADDRESS]**.

[SIGNATURE]

Note to HR Leaders:

Don't forget to attach or link to any educational materials, such as a Benefits Guide, that your employees may need for a smooth enrollment process!

Bonus! New Hire Open Enrollment Email

Subject Line: Welcome! New Hire Enrollment Now Open!

Hello **[FIRST NAME]**,

I'd like to personally welcome you to the team. It's an exciting time for **[COMPANY NAME]** as we continue to grow. We are glad to have you on board!

You are now eligible to enroll in your **[COMPANY NAME]** benefits! Remember, you have **[INSERT NUMBER OF DAYS THEY HAVE TO ENROLL]** days to complete enrollment. Please enroll at **[WEBSITE]**. Our secure website is set-up to automatically take you through the entire enrollment process for the benefits you are eligible for.

It's easy to enroll:

1. Go to **[WEBSITE]**.
2. Enter your username and password.
   a. **[USE THIS SPACE FOR USERNAME INSTRUCTIONS]**
   b. **[USE THIS SPACE FOR PASSWORD INSTRUCTIONS]**
3. Follow the prompts to make your benefit selections for 20XX.
4. Review your selections and dependent elections, then **[INSERT ACTION TO TAKE]** to complete enrollment.

Reminder: You will need the date of birth and Social Security number for each of your dependents (if applicable). These are required to enroll them in eligible benefits and to complete your beneficiary designation.

[SIGNATURE]

Note to HR Leaders:

Don't forget to attach or link to any educational materials, such as a Benefits Guide, that your employees may need for a smooth enrollment process!

About us

WEX (NYSE: WEX) is the global commerce platform that simplifies the business of running a business. We have created a powerful ecosystem that offers seamlessly embedded, personalized solutions for our customers. Through our rich data and specialized expertise in simplifying benefits, reimagining mobility, and paying and getting paid, WEX aims to make it easy for companies to overcome complexity and reach their full potential. For more information, please visit www.wexinc.com.

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