

Post-Enrollment Checklist

Are you keeping up with your post-enrollment responsibilities? Use this checklist to help remember important tasks all year long.

☐ **LEGAL & COMPLIANCE**

- Update Section 125 Plan document
- Check for applicable employee benefits legislation and administrative guidance
- Report Affordable Care Act data
- Get Election Forms, Insurance Waivers, and Salary Reduction Agreements signed, if applicable
- Distribute Universal Availability Forms for 403(b) plans
- Perform non-discrimination testing

☐ **BILLING**

- Upload payroll file
- Reconcile billing

☐ **YEAR-ROUND SUPPORT**

- Administer new hire enrollments
- Provide benefit education for employees
- Offer education on Employee Assistance Programs (EAPs)
- Conduct online account training
- Conduct Dependent Verification Reviews

☐ **FOR EMPLOYEES**

- Assist employees with claim filing
- Help termed/retired employees keep coverage
- Provide assistance with benefits for retirees
- Plan mid-year 403(b) plan education
- Assist employees with Flexible Spending Account (FSA) participation, including benefits debit card substantiation

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