

VIRTUAL OPEN ENROLLMENT

Reference Guide

2020

The global pandemic has changed many of the ways we interact with our membership, but it has not changed the service we strive to provide. As most UnitedAg events have gone virtual, our open enrollment meetings are no different. We have crafted a few options for our groups to utilize that we hope are suitable solutions until we are able to see you again in person.

Virtual Options

1. Video or Telephone Conference Meetings

Employers can schedule a video or telephone conference call to replace in person presentations for their staff with their designated field service representative. Like standard meetings, the representative will provide a benefit overview and will be available for questions after the presentation.

2. Virtual Office Hours

Employers can request a specific date and time frame they would like their field representative to be available to answer member benefit questions. Using an employer sign-up sheet, members can sign-up for their own appointment with the representative during that time frame.

3. Customized Benefit Recordings

Based on a particular employer's benefits, a field service representative can prepare a recording to distribute to employees during open enrollment. Members can listen to the overview of their unique benefits in their own time.

Coordination

Step 1: Contact us

If you are interested in exploring one of our options for a remote open enrollment meeting, please contact one of our Client Services Account Managers at clientservices@unitedag.org or reach out to your assigned Field Service representative. Please let us know the specific time frame and date range you have in mind for the meeting. We ask for at least 10 days advance notice.

Step 2: Select a Virtual Option (or Combination)

If one of our virtual options fits your needs, let us know which venue you would like to pursue. Based on this information, we will ask a series of questions regarding logistics (# of people, materials). We will coordinate on our end to ensure you are working with your assigned account manager and field representative.

Step 3: Share your Goals

What is your organization hoping to accomplish during this meeting? Is there a particular benefit you would like our team to review with your employees?

Continued Benefits

- Printing and shipping of physical enrollment plan benefit packets
- Digital copies of enrollment materials
- Requests for pre-printed enrollment forms

What to Expect: Virtual Conference

Coordination

To begin, our team will ask a series of questions to ensure the meeting experience is tailor-made to your organization. Please be prepared to answer:

- What is the desired date / time / length for the meeting?
- Who is the day-of contact and coordination contact?
- Will you be utilizing our Zoom services or your own video/phone conferencing?
- To whom should our team provide the Zoom / Outlook meeting details for distribution?
- How are you planning on employees participating? (In-person meeting at their location or all employees calling in / logging into Zoom?)
- How long does the presentation need to be?
- Are there any specific benefits to be reviewed?
- Do you need materials in advance? (PDF or physical copies)

Meeting Confirmation

With the meeting confirmed, our team will process internal logistics, you can expect:

- An outlook invitation from our team to the provided contacts including Zoom details for the meeting
- Confirmation of the shipment of materials should any have been requested
- Digital copies of the presentation materials (typically the plan benefit packet) for review / approval
- Information of meeting provided to service representative

Day of Meeting

On the day of the meeting, your field representative will present benefits at the scheduled time, sharing a screen (if applicable) with the plan benefit material, and pause afterwards for questioning. If physical materials have been requested, they will have been received prior to meeting date.

What to Expect: Virtual Office Hours

Coordination

Please be prepared to answer:

- What is the desired date / time frame for the desired office hours?
- Who is the day-of contact?
- Which contact will coordinate with the employees to schedule individual appointments during office hours?
- Approximately how many employees will be scheduling appointments?
- How long would you like the duration of each meeting to be scheduled?
- Do you need materials in advance of the office hours? (PDF or physical copies)

Office Hour Confirmation

You can expect:

- A UnitedAg representative to provide a sign-up sheet for the group coordination contact to utilize
- A representative to reach out a few days prior to the scheduled office hours to confirm all sign-up appointments

Day of Scheduled Office Hours

A UnitedAg field representative will hold 10-20-minute meetings (depending on coordination) with each of the members signed up for office hours during the allotted time. This time can be used to ask specific benefit questions based on individual members experience, and any questions left unanswered will be researched internally for follow-up at another time.

What to Expect: Benefit Recordings

Coordination

Please be prepared to answer:

- Who is the coordination contact?
- How long does the recording need to be?
- Are there any specific benefits to be reviewed?
- By which date would you like to have the finalized recording?
- Do you need materials in advance? (PDF or physical copies)

Recording Confirmation

You can expect:

- A draft of the benefit recording for the group contacts approval prior to finalization (expected 3-5 days prior to meeting)
- Final recording on day prior to requested date of finalization

Final Recording Deadline

On the day prior to the requested date of finalization, our team will provide the final benefit recording for use. Each benefit recording will come with a disclaimer indicating the benefit period for which the recording is valid as well as a reminder that all eligibility / specific benefit cost share should always be confirmed with the Member Services department.