



OPEN ENROLLMENT CHECKLIST

August

Click here to
Watch Open
Enrollment
Webinar

Steps :

- ☒ Create List of patients
- ☐ Confirm Content
- ☐ Put up Flyers - click here

September

Create Emails -
Click here for
Email Templates

Steps :

- ☒ Send out Communication 1 - Week 1
- ☐ Post on Social Media - click here
- ☐ Send out Communication 2 - Week 3

October

Have your
Price
Comparison
Sheets Ready

Steps :

- ☒ Send out Communication 3 - Week 1
- ☐ Print Comparison Worksheets
- ☐ Post on Social Media - click here

November

Click here for
our customizable
info sheet for
patients

Steps :

- ☒ Send out Communication 4 - Week 1
- ☐ Post on Social Media - click here
- ☐ Keep OE Flyers & MP Brochures out in the office

December

Get Ready
to Enroll
New Members
January 1!

Steps :

- ☒ Send out Communication 5- Week 1
- ☐ Post on Social Media - click here
- ☐ Keep OE Flyers & MP Brochures out in the office