



ANNUAL ENROLLMENT CHECKLIST

Use this checklist from our Annual Enrollment Guidebook to simplify your benefits decisions and get the most out of your benefits in the year to come.

- ✔ **Make sure your beneficiaries are accurate** and up to date for your retirement savings plan, HSA, and life insurance.
- ✔ **See if your employer offers a decision support tool** to guide you through annual enrollment.
- ✔ **Understand how your plan options may have changed** since last year, including new condition-specific offerings like mental health care.
- ✔ **Compare out-of-pocket costs** in plan options to make sure the plan you choose matches your budget.
- ✔ **Determine whether your providers are in-network** by using a provider search tool for the plan.
- ✔ **Consider whether an HSA or FSA is right for you.** If your employer offers a contribution match, factor that into your savings strategy.
- ✔ **Find out if your employer offers an app** to manage all of your health-related benefits throughout the year.
- ✔ If you feel comfortable doing so, **disclose your race, ethnicity, and gender identity** so that your employer can make better-informed decisions about your benefits in the future.

READ THE ANNUAL ENROLLMENT GUIDEBOOK

This information is intended to be educational and is not tailored to the needs of any specific individual.

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