

Open Enrollment Support

Select one or more services and identify the locations or employee groups for each. Complete digitally or print and return to TSI.

COMPANY OR GROUP

ENROLLMENT DATES

PRIMARY CONTACT

EMAIL

PHONE

01 SELECT YOUR ENROLLMENT SERVICES

Check all that apply. Different locations may use different services.

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Face-to-face enrollment - Private on-site sessions with a licensed counselor.

LOCATION(S)

EMPLOYEES per location(s)

☐

Self-enrollment with call center assistance - Remote support from a licensed counselor.

LOCATION(S)

EMPLOYEES per location(s)

☐

Self-enrollment with video assistance - Customized education and digital resources; no live counselor.

LOCATION(S)

EMPLOYEES per location(s)

02 SELECT COMMUNICATION DELIVERY

Check all that apply and assign the locations.

☐

TSI sends text / email

LOCATION(S)

☐

HR sends internal emails

LOCATION(S)

ADDITIONAL LOCATIONS OR INSTRUCTIONS

How Each Option Works

Review the requirements below before selecting support for each location.

1 Face to face enrollment on site

Private, one-on-one benefit reviews with a licensed counselor. Ideal for groups seeking full personal support at employee work locations.

REQUIREMENT All employees must attend a session with a licensed benefits counselor.

BEFORE ENROLLMENT After the four-video preparation sequence described below, employees use the calendar included with the final video to book an on-site day and time.

PROCESS The group/employer provides access to its enrollment platform so counselors can assist employees in reviewing all their benefits and completing enrollment. This is TSI's most popular approach for efficient enrollment and comprehensive personal service.

2 Self enrollment with call center assistance

Remote, human assistance to review all benefits. Ideal for employees working from home or spread across the country.

REQUIREMENT We recommend requiring every employee to contact a licensed counselor so enrollment progress and deadlines can be tracked.

BEFORE ENROLLMENT After the four-video sequence, the final video includes a calendar to schedule a remote counselor appointment, including from home.

PROCESS We recommend giving counselors enrollment platform access to assist employees on all benefits and help reduce enrollment and underwriting errors, HR cleanup, and billing discrepancies.

3 Self enrollment with video assistance

Independent enrollment with customized education and digital resources, without live human assistance.

REQUIREMENT Begin planning several months in advance, before enrollment dates are finalized. Time is needed to customize videos to the group's benefits.

BEFORE ENROLLMENT After the four-video sequence, the final video opens a dashboard explaining insurance structure, terminology, how to read insurance information and health plans, with benefits guides, Q&A, and an AI assistant for basic questions.

PROCESS The group sends each employee its enrollment platform link to begin and complete enrollment independently.

Preparation and communication for all three options

Four videos over four days. All employees receive one video per day, starting four days before enrollment. These videos prepare employees to consider who depends on them, their lifestyle, and what to protect; they do not explain specific benefits.

TSI sends text / email. The group provides a list of all employees, including mobile phone numbers and email addresses, for TSI to distribute the videos.

HR sends internal emails. TSI supplies four emails for HR to send internally, one per day during the four days before enrollment. No private employee contact data needs to be shared with TSI for this delivery method.