

# Open Enrollment Client Success Checklist

This checklist will help you to ensure all necessary items are completed before Open Enrollment launches to ensure a smooth process.

Please send completed form to your Benefits Consultant.

Open Enrollment Success Checklist Items		Signature of Completion
Payroll	Deduction Code Review	
	Benefit Deduction Settings	
Access	Broker Access	
	Manager Role Access	
Additional	Adding Docs to Library	

## Deduction Code Review

Please [review the current deductions](#) being actively used in Benefit Advisor and ensure they match the deduction codes in Paycor.

After you are in the designated location of your payroll setup for deduction codes, please compare to the Benefit Advisor report to confirm for accuracy. Please note, deduction codes are case and space sensitive. If you have questions on how to [add](#) or [configure](#) deduction codes in Paycor, please reach out to Support at (855) 565-3285.

**IMPORTANT:** If you are adding or updating any deduction codes, you must let your Benefits Consultant know immediately as this can negatively impact future OE Deductions from flowing over.

## Benefit Deduction Settings

These settings in Paycor ensure that your Open Enrollment changes fall on the correct check date through the [Benefit Deduction Settings](#).

Please note that these settings must be in place 15 days before your renewal date to ensure an accurate first payroll. Example: Renewal Date is 07/01 so your Benefit Deduction Settings must be in place by 06/15.

## Manager Role Access

Please review [manager role access](#) to ensure accuracy. Please note, you will need to email your Benefit Consultant to remove, add or modify access.

## Adding Documents to Library

Customized document can be added to the [library](#) in Benefit Advisor for employee review while they are making elections.

Documents can also be added to [plan details](#) and tied directly to plans.

**IMPORTANT:** Do not add documents in the OE Wizard or in Sandbox. Please add documents directly into production to avoid errors when accessing in enrollment.