Decision Doc
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Implementation Call FAQ

One of our number one goals is to make your Open Enrollment season as easy as possible. Your Implementation Call is your chance to meet your dedicated Customer Success team, ask us any questions, and make sure you feel at ease with your upcoming Open Enrollment (OE) with us. We strongly recommend all partners be involved so that everyone is on the same page. This includes your HR team, Unum account representative, and broker (if applicable).

These calls typically cover the following:

1. Meet your dedicated Customer Success team
2. Overview of your current OE timeline and process
3. Decision Doc engagement details including communication needs and timelines
4. Questions and next steps

Here are some things that may be helpful to think about before your call:

1. **What are your goals for Open Enrollment?** Understanding your priorities will help us make sure Decision Doc helps meet those goals! Goals can include teaching employees about a new plan, help employees understand HDHPs and HSAs, or educating employees about how your total benefit package can set them up for financial resilience.

2. **How do you communicate with employees?** We can include information about Decision Doc in emails, posters, and more! You know your employees best and information about how you usually communicate with them is helpful to provide materials in formats that will resonate with them. It is also helpful to include information about Decision Doc in your benefits guide, since Decision Doc will be available to employees that experience a qualifying life event during your plan year.

3. **Plan Documents and Contribution Strategy.** We can review your plan documents and contribution strategies, if you have them available in advance of our call together. These can include Schedule of Benefits, Summary of Benefits and Coverage, formularies, monthly premiums and contributions, EE/ER payroll deductions, and HSA/HRA/FSA details.

Our team will be in touch to schedule a time that works for everyone.