Employee Communication Checklist
for a New Health Plan

Do your employees know how to use their benefits effectively? Use this checklist to help employees understand their new benefits and make informed care decisions.

1. Communicate essential information before the new plan goes into effect.

Before January 1 rolls around, help your employees prepare for their new plan by conveying the following:

- ☐ Explain what changed. Highlight the changes employees will notice, especially networks, providers, pharmacies, costs and new resources.
- ☐ Tell employees any action they need to take. This could include choosing a new provider, updating payment information, downloading an app or registering for a portal.
- ☐ Address ongoing care. Give employees instructions on how to minimize disruption if they are receiving ongoing treatment, taking specialty medications or have procedures scheduled.
- ☐ Show employees where to find providers. Go beyond sending a directory link, and actually explain how to identify the providers and facilities they should use.

2. Give employees a road map for care.

Simplify care decisions by explaining where and how employees can access different types of care.

- ☐ Routine care: Where should employees start?
- ☐ Urgent care: What should they do when they need same-day care?
- ☐ Emergency care: Where can they obtain care for serious or potentially life-threatening symptoms?
- ☐ Specialty care: How do they find or access specialists, and is a referral necessary?
- ☐ Prescriptions: Where should they fill prescriptions?
- ☐ Complex care: Is navigation or care management assistance available?

3. Make the basics easy to find.

Tell your employees where and how to access important resources.

- ☐ ID card/access instructions
- ☐ Member portal/app
- ☐ Provider search
- ☐ Pharmacy information
- ☐ Telehealth information
- ☐ Benefits summary
- ☐ Key phone numbers
- ☐ HR/benefits contact
- ☐ Claims/billing help

4. Keep communicating after January 1.

Create a benefits communication calendar that spans the year.

- ☐ Send a first-week reminder about essential resources and necessary actions.
- ☐ Explain one benefit or resource at a time instead of repeating the entire benefits guide.
- ☐ Use real-life scenarios to show how employees can navigate common issues.
- ☐ Repeat important information across email, meetings and other employee channels.
- ☐ Provide timely reminders about flu shots, mental health resources and other relevant topics throughout the year.

5. Use the five-question test.

Can your employees answer these questions? If not, your benefits communication isn't finished.

- ☐ Where do I go for routine care?
- ☐ Where do I go when I need care quickly?
- ☐ How do I know whether a provider is covered or preferred?
- ☐ How do I get my prescriptions?
- ☐ Who do I call when I need help?

A better health plan only works when employees know how to use it.

Health2Business connects self-funded employers with community health care providers through direct partnerships designed to improve access and help control costs.