

Open Enrollment Project Timeline by Phase



Kick Off & Intake

4 months from renewal date

Align on goals, timelines, and key milestones for open enrollment (OE) readiness

Evaluate enrollment experience options with client to determine best fit



System Updates

4 weeks from launch date

Requirement documents received

Configure and review plans, rates, eligibility, enrollment, integrations, calculations, and rules



Validation

3 weeks from launch date

Complete internal auditing of system logic and benefits administration workflows

Lead end-to-end testing cycles to capture and address client adjustments



Launch

System live to employees!

Finalize approvals and open the enrollment experience for employees

Support client communications and confirm readiness after go-live



Payroll

3 weeks post launch

Validate deduction codes and benefit deduction settings

Deductions flow to payroll

Share pre- and post-payroll instructions with stakeholders



Support

30 days post launch

Ownership transitions to Support for ongoing continuity

Full transition completes 30 days post-go-live after stabilization and initial payroll cycles

EDI Timeline | Planning Ahead for Success

Know Your Send Dates

Watch this tutorial [Scribe video](#) on how to confirm when your OE files are scheduled to send. Be sure to review key dates early as part of your Open Enrollment planning.

Watch for your Blackout Window

Once your OE file is sent, weekly files pause until the new plan year begins (e.g., sent 12/09, resumes 01/07).

Any changes during the blackout window, you as the client are responsible for sending directly to the vendor.

Plan Ahead for Updates

Updating an existing file structure typically requires a **4-week turnaround**. Factor this timeline into your OE planning to ensure changes are completed and tested before key project milestones.

