

Open Enrollment Best Practices

At the beginning of the pandemic, we couldn't meet to hold in-person employee open enrollment meetings. Together with our account representatives, we created videos to effectively help employees safely learn about their benefits at their convenience.

If your customer needs an open enrollment video, please contact Valerie Ortiz or Sam Rasmussen in the Marketing Department.

Voiceover Recording Best Practices

1. Don't forget to speak clearly and concisely. No mumbling!
2. Your audio quality is very important. If you can, use a microphone or headset to record your audio. Bluetooth earbuds do a decent job, as well. Connect with your inner podcast host. But no funny shock-jock business.
3. If you are showing your face, make sure to set up your Surface Pro on an elevated platform to get a better angle. Nobody wants to look up your nose.
4. If possible, set up your device in front of a window or a source of natural light. Make sure that you are facing the window, allowing the natural light to shine on your face. Natural light offers a better quality than light from a light bulb. Light bulbs tend to alter the natural tone of your skin.
5. Dress like you are meeting with the client if you are showing your face. We can all appreciate a Star Wars t-shirt if we're having an internal meeting, but that's not typically your standard client meeting attire.
6. If you're recording with Ring Central, make sure to turn on "Enable HD." Full instructions on enabling HD recording is laid out at the end of this document.
7. Make sure to perform a test run of your recording and lighting setup before your meeting or recording. It always helps to be prepared.

Supplemental Life Insurance and AD&D Open Enrollment Video Best Practices

PowerPoint:

1. Send an email to Marketing CM@NISBenefits.com to let them know you will need an open enrollment presentation for your client. Please provide the group name and state
2. Sam Rasmussen will send you a PowerPoint template that will have sections highlighted that need customization. Information needed:
 - a. Employee benefit levels, increments, and maximums
 - b. Guaranteed-Issue (GI) amounts, age requirements, and participation requirement
 - c. Dependent coverage
 - d. Enrollment period start and stop dates
 - e. Who and where employees will need to deliver filled-out forms
 - f. Rates for employee-only, spouse, and dependent children
 - g. NIS contacts to be included on this case
 - h. Effective date of coverage
3. Sam Rasmussen enters the information you provided above and sends it back to you for approval
4. Sam Rasmussen sends PowerPoint to the NIS Underwriting department and the MNL Compliance department for review. This process can take anywhere from 10-15 business days on average
5. Once the approval is received, Sam Rasmussen will send you the approved PowerPoint file
6. You record your voiceover (see last page for instructions on recording with PowerPoint)
7. Send PowerPoint file with recordings saved to Sam Rasmussen
8. Sam will turn the PowerPoint into a video, edit it, and add some background music.
Turnaround time: 1 day
 - a. Please note that changes to the video or voiceover will extend this turnaround time and may result in extra costs for voiceover changes if a professional voiceover artist is hired.
9. You will receive the video link

Long and Short Term Disability Insurance Open Enrollment Video Best Practices

PowerPoint:

1. You receive a notification that there will be an open enrollment for a client
2. You send an email to Marketing at CM@NISBenefits.com to let them know you will need an Open Enrollment presentation
3. Sam Rasmussen will send you a PowerPoint template that will have sections highlighted that need customization. Information needed includes:
 - a. Open enrollment start and stop dates
 - b. Last day to enroll without medical questions
 - c. Whether or not guarantee-issue (GI) coverage is available
 - d. Participation requirement for GI coverage
 - e. Benefit amount being offered subject to maximum
 - f. Effective date of coverage
 - g. Employee-paid or employer-paid
 - h. Benefit schedule – what day coverage begins for accident or illness
 - i. Maximum benefit duration
 - j. For school districts, if benefits are paid over summer months
 - k. Maternity covered? Yes or no
 - l. Pre-existing condition exclusion
 - m. Age rates and how to calculate premium
 - n. NIS Contacts for employees if they have questions
4. Sam Rasmussen enters the information you provided above and sends it back to you for approval
5. The PowerPoint will be sent to the NIS Underwriting department and the MNL Compliance department for review. This process can take anywhere from 10-15 business days on average
6. Once the approval is received, Sam Rasmussen will send you the approved PowerPoint file
7. You record your voiceover (see last page for instructions on recording with PowerPoint)
8. Send PowerPoint file with recordings saved to Sam Rasmussen
9. Sam will turn the PowerPoint into a video, edit it, and add some background music.
Turnaround time: 1 day
 - a. Please note that changes to the video or voiceover will extend this turnaround time and may result in extra costs for voiceover changes if a professional voiceover artist is hired.
10. You will receive the video link

Dental/Vision Insurance Open Enrollment Video Best Practices

PowerPoint:

1. You receive a notification that there will be an open enrollment for a client
2. Send an email to Marketing at CM@NISBenefits.com to let them know you will need a presentation
3. Sam Rasmussen will send you a PowerPoint template that will have sections highlighted that need customization. Information needed includes:
 - a. Eligibility dates for new hires
 - b. Whether or not late enrollees can enroll anyway
 - c. Dental plan highlights
 - i. Individual deductible
 - ii. Annual benefit
 - iii. Orthodontia lifetime benefit
 - iv. All covered services included in the plan
 - v. URL for details on the dental network
 - vi. Dental rates for employee-only, employee+spouse, employee+child/ren, family
 - vii. How to get ID cards
 - viii. How to view status of claims
 - ix. Where to access an explanation of benefits
 - x. NIS contact for employees to ask questions
 - d. Vision plan highlights
 - i. Benefit amounts for:
 1. Exam
 2. Single vision
 3. Bifocal
 4. Trifocal
 5. Lenticular
 6. Progressive
 7. Contacts
 8. Frames
 - ii. Deductible amounts
 - iii. Frequency in which glasses can be replaced
 - iv. Vision network information and URL
 - v. Monthly rates
 - vi. NIS contact for employee questions
4. Sam Rasmussen enters the information you provided above and sends it back to you for approval
5. Once the approval is received, Sam Rasmussen will send you the approved PowerPoint file
6. You record your voiceover (see last page for instructions on recording with PowerPoint)
7. Send PowerPoint file with recordings saved to Sam Rasmussen
8. Sam will turn the PowerPoint into a video, edit it, and add some background music.

Turnaround time: 1 day

 - a. Please note that changes to the video or voiceover will extend this turnaround time and may result in extra costs for voiceover changes if a professional voiceover artist is hired.
9. You will receive the video link

Recording an Open Enrollment Presentation Using Ring Central Meetings

If you would rather record your presentation using Ring Central Meetings instead of using PowerPoint (usually helpful if the presentation is longer than 20 slides), follow these steps:

1. Open Ring Central Meetings
2. Click “New Meeting”
3. In the bottom-left corner of your screen, click “Start Video”
4. To the right of the “Start Video” button, there is a chevron icon. Click it to open a pop-up menu. Click “Video Settings...”
5. In the “My Video:” section, check the box for “Enable HD” and close the window
6. On the middle-right side of the tool bar, click “Record.” In the following pop-up menu, click “Record to This Computer”
7. Open your PowerPoint you want to record
8. Click the green “Share” button at the bottom of your screen and select which content you want to share. Typically, you’ll want to share your PowerPoint program only, but you can also share the screen where you have the PowerPoint displayed
9. In your PowerPoint, click the Presentation button next to the zoom controls near the bottom-right of your screen
10. Now, you can run through your presentation as you see fit, clicking through the presentation and recording your voiceover as you go along
11. Once you have finished your recording, stop sharing your screen and leave the meeting
12. Ring Central will immediately begin converting your meeting to an .mp4 file. A window will pop up with a blue progress bar to show you it’s working
13. Once it’s finished, you can find the recording in your Documents folder in a folder called “RingCentralMeetings”
14. The latest meeting recorded will be on top
15. Open the file and find the file called “rcrecord_0”
16. There may be more than one “rcrecord” file depending on how many times you started and stopped your recording
17. Save the file on the Everyone Drive in the Marketing folder in its own folder
18. Send the file path to Sam Rasmussen in Marketing. He will edit the video and provide you with a landing page and URL for video distribution to the client

Recording Voiceover Using PowerPoint

You record your voiceover slide-by-slide using PowerPoint's built-in voiceover feature (Sam Rasmussen can show you how do to this if you don't know how).

How to record with PowerPoint

1. Click the slide you want to record on
2. Click the "Insert" tab
3. Hover your mouse over to the far-right side of the tool bar. Under "Media," click, "Audio"
4. Click, "Record audio"
5. There is no need to name the audio track
6. Click the red button to record your voiceover
7. When you've finished recording for the current slide, click the red box to stop recording
8. Save the presentation
9. Repeat for all following slides