



Implementation Timeline

Sample 60-day schedule with key benchmarks at a glance

60 DAYS OUT FROM EFFECTIVE DATE

- Review, sign and initial contracts to begin your implementation
- Schedule an Introduction Call and, if desired, ongoing bi-weekly touch point calls

45 DAYS OUT

- Complete online configuration workbooks with plan design and banking information
- Schedule configuration review set-up
- Discuss timing of COBRA member take-over mailing
- EDI discussions begin with vendor partners

30 DAYS OUT

- COBRA take-over data due (weekly updates are generally required)
- COBRA take-over letters are mailed
- Start spending account enrollment process
- If applicable, Spending Account takeover demographic data due (for ordering of benefit cards)

15 DAYS OUT

- EDI testing should be in process
- Spending Account enrollment data due
- Final COBRA takeover data due
- Cafeteria Plan Documents and SPDs Available on iView
- Remaining benefit cards ordered
- Implementation calls transition to client training calls