

GETTING STARTED RIGHT

Implementation

The setup work that happens before employees ever see an enrollment screen.

A new benefits program — or a new plan year — only goes smoothly if the groundwork is done right the first time. Implementation covers everything that happens before employees ever see an enrollment screen: carrier connections, system configuration, and a rollout plan built around your timeline, not a generic launch date.

THE IMPLEMENTATION TIMELINE

Kickoff & Discovery	Confirm plan design, existing systems, and key dates before any setup begins.
Carrier & System Setup	Connections configured and tested against real plan and eligibility rules.
Testing & Review	Sample data run through the full flow to catch issues before employees see anything.
Go-Live	Enrollment opens on schedule, with systems already verified end to end.
Post-Launch Check-In	A follow-up review once real enrollment data is flowing, not just test data.

WHAT WE NEED FROM YOU

- ☐ Access to **current plan documents** and carrier contacts
- ☐ A point of contact for **system and data questions**
- ☐ Confirmation of **key dates** — enrollment window, effective date, renewal
- ☐ Sign-off at each phase before moving to the next

WHAT MAKES IT SMOOTH

Built Around Your Calendar

Timeline set by your enrollment dates, not a fixed template.

Tested Before Launch

Issues caught in review, not discovered by employees on day one.

Minimal HR Lift

Setup work happens on our side, with clear check-ins on yours.

One Point of Contact

A single, consistent contact throughout the rollout.

Timeline shown is representative. Actual implementation length depends on plan complexity and system connections required.