

# PlanSource Implementation Checklist

## Mid-Plan Year

- ***For Every Benefit/Carrier We Will Need:***
  - Policy Numbers/Group Numbers
  - Technical Contacts (to assist with EDI Configuration)
  - SPDs, SPCs, summaries, flyers, booklets, etc.
- ***All Employee Monthly Rates and Employer Contributions for All Benefits***
- ***Current Payroll Calendar***
  - Please be sure pay dates are reflected, and list the appropriate frequencies - weekly, biweekly, semimonthly, etc.
- ***Location List (if tracking multiple in the system)***
- ***All Applicable Waiting Periods***
- ***Benefit Classes for Eligibility***
- ***Demographic Data Export from Current Ben Admin Platform***
  - Please note that we use this data as a baseline for the integrity of the data within your current system and will allow the PlanSource team to advise where we may need to work with you to perform data cleanup prior to the data phase of the implementation process. We will want visibility into demographic data including the following fields:
    - EE Name, Address, DOB, SSN, and any data fields used to determine eligibility
    - Dependent Name(s), Relationship, DOB, SSN