

White Cap Ongoing Implementation Timeline

BENEFITS ADMINISTRATION SYSTEM LEVEL OF EFFORT

- Up to 5 hours per week for project team
- Up to 10 hours per week for project team
- Up to 20 hours per week for project team

ADDITIONAL SERVICES LEVEL OF EFFORT

- Up to 3 hours per week for project team
- Up to 6 hours per week for project team
- Ben Admin
- Additional Services

	TASK NAME	START DATE	END DATE	ASSIGNED TO
	Execute Partnership	01/16/25	01/20/25	Sales Team
	Project Team Assignment	01/21/25	01/23/25	Onboarding Analyst
	Assign EDI Project Coordinator	01/21/25	01/22/25	Onboarding Analyst
	Stage 1 - Planning	01/24/25	02/05/25	
●	EULA Completion	01/24/25	01/24/25	White Cap Project Team
●	Sales Turnover Meeting (Sales to Implementation Transition Call) - to include TSM and additional services where applicable	01/24/25	01/28/25	Implementation Project Manager
●	Project Kick Off Prep	01/29/25	01/30/25	Implementation Project Manager
●	Send Introduction email; schedule Kick Off call	01/29/25	01/30/25	Implementation Project Manager
●	EDI Project Coordinator to review all materials collected so far	01/29/25	01/30/25	EDI Project Coordinator
●	Remind Client of Checklist Due (Countdown items) - inform them of due date	01/29/25	01/30/25	Implementation Project Manager
●	Complete Eligibility Matrix	01/29/25	01/30/25	White Cap Project Team
●	Identify Test Employees	01/29/25	01/30/25	White Cap Project Team
●	Provide Payroll Benefit Deduction Report	01/29/25	01/30/25	White Cap Project Team
●	Employee Communications/Rollout Toolkit	01/29/25	01/30/25	White Cap Project Team
●	Gather Carrier structure (EDI Files)	01/29/25	01/30/25	White Cap Project Team
●	EFT and Premium Billing Checklist (if applicable)	01/29/25	01/30/25	White Cap Project Team
●	Lift Off Call	01/31/25	01/31/25	Implementation Project Manager
●	Send Timeline link + Signoff Document	01/31/25	01/31/25	Implementation Project Manager
●	Send weekly call invites	01/31/25	01/31/25	Implementation Project Manager
●	Return Latest Deduction Report	02/03/25	02/04/25	White Cap Project Team
●	Timeline Acceptance	02/03/25	02/04/25	White Cap Project Team
●	Gather + Provide API Credentials	02/03/25	02/04/25	White Cap Project Team

●	Gather + Provide SSO Credentials	02/03/25	02/04/25	White Cap Project Team
●	Discovery Call Prep	02/03/25	02/05/25	Implementation Project Manager
	Stage 2 - Requirements Gathering - Implementation Discovery	02/06/25	03/04/25	
●	Implementation Discovery	02/06/25	02/06/25	Implementation Project Team
●	Discovery Call Wrap-up	02/06/25	02/06/25	Implementation Project Team
●	Timeline Review/Update (if applicable)	02/06/25	02/06/25	Implementation Project Manager
●	EDI Project Coordinator and BC meet to review Plan Docs and how the plans should be Created and Mapped in Ben Admin	02/07/25	02/07/25	EDI Project Coordinator
●	Populate Wizard	02/07/25	02/11/25	Implementation Analyst
●	Technical Review (Wizard) Call	02/12/25	02/14/25	Implementation Project Team
●	Implementation Wizard/Plan Final Sign-off	02/17/25	02/25/25	White Cap Project Team
●	Client returns Life Events and Document Requests	02/26/25	03/04/25	White Cap Project Team
	Stage 3 - Configuration & QA	02/26/25	03/19/25	
●	EDI Project Coordinator EDI Updates	02/26/25	02/27/25	EDI Project Coordinator
●	Schedule Data Review Call #1	02/26/25	02/26/25	Implementation Project Manager
●	Configuration	02/26/25	03/04/25	Implementation Analyst
●	Page Content Updates	03/05/25	03/05/25	Implementation Analyst
●	Census API Enablement and Push - if applicable	03/05/25	03/05/25	Implementation Analyst
●	Internal Configuration Testing	03/05/25	03/10/25	Implementation Analyst
●	Internal Configuration QA	03/11/25	03/19/25	Implementation Project Team
●	Carrier QA	03/07/25	03/07/25	External Carrier QA Team
●	Data Review Call #1	03/12/25	03/12/25	Implementation Benefits Consultant
●	Create Client Testing Log	03/11/25	03/12/25	Implementation Project Team
●	Schedule System Testing Working Session	03/18/25	03/19/25	Implementation Project Manager
	Stage 4 - System Testing	03/20/25	04/17/25	
●	System Testing Working Session	03/20/25	03/20/25	Implementation Benefits Consultant
●	Client Testing Window	03/21/25	03/31/25	White Cap Project Team
●	Testing Check In Working Session	04/01/25	04/01/25	Implementation Benefits Consultant
●	Client Requested Config Update - if applicable	04/01/25	04/07/25	Implementation Analyst
●	EDI Project Coordinator Post System Testing Tasks	04/08/25	04/09/25	EDI Project Coordinator
●	Final Employee Experience Walk-Thru Working Session	04/08/25	04/08/25	Implementation Benefits Consultant

●	System Sign Off	04/09/25	04/09/25	White Cap Project Team
●	Audit Checkpoint #1 - Attach items to milestone - see notes	04/10/25	04/10/25	Implementation Project Manager
●	Provide EE Census, Dependent Census and Coverage Data	04/08/25	04/11/25	White Cap Project Team
●	Begin Dual Maintenance Tracking	04/07/25	04/07/25	White Cap Project Team
●	Review of Data provided	04/14/25	04/15/25	Implementation Benefits Consultant
●	Data Review Call #2 and Scrub	04/16/25	04/16/25	Implementation Benefits Consultant
●	<i>Submit Data to Data team for conversion and load</i>	04/17/25	04/17/25	Implementation Analyst
	Stage 5 - Data	04/09/25	06/30/25	
●	Complete Documentation for Eligibility Team	04/09/25	04/15/25	Implementation Project Team
●	Census Data Loaded	04/18/25	04/23/25	Implementation Project Team
●	Client Review of Census Discrepancies	04/24/25	04/29/25	White Cap Project Team
●	Final Census Updates	04/30/25	04/30/25	Implementation Analyst
●	Enrollment Coverage and Beneficiary Upload	05/01/25	05/06/25	Implementation Analyst
●	Verify EDI Cases are in "Audit Testing" or "Complete", if not notify CCT dates to begin transmission	05/07/25	05/07/25	EDI Project Coordinator
●	Data Discrepancy Call	05/07/25	05/07/25	Implementation Project Team
●	Client Review Data Discrepancies	05/08/25	05/15/25	White Cap Project Team
●	EDI Checkpoint - see description for details	05/16/25	05/16/25	EDI Project Coordinator
●	Resolve Discrepancies	05/16/25	05/19/25	Implementation Analyst
●	Begin Dual Maintenance Entries	05/19/25	05/19/25	White Cap Project Team
●	Run Validation Report, Troubleshoot Errors, Add notes	05/20/25	05/20/25	Implementation Analyst
●	Validation Report Review Call	05/20/25	05/22/25	Implementation Project Team
●	Client Reviews Validation Report	05/23/25	05/30/25	White Cap Project Team
●	Resolve Validation Errors	06/02/25	06/03/25	Implementation Analyst
●	Run Recalculation Preview	06/04/25	06/04/25	Implementation Analyst
●	Client Review Recalculation Preview	06/05/25	06/10/25	White Cap Project Team
●	Run Recalculation and Auto Default Processor	06/10/25	06/10/25	Implementation Analyst
●	Provide latest payroll deduction report with deduction amounts and coverage tier details	06/04/25	06/04/25	White Cap Project Team
●	Benefit Audit	06/04/25	06/09/25	Implementation Project Team
●	Audit Review and Notes provided to client	06/10/25	06/10/25	Implementation Analyst
●	Benefit Audit Review Call	06/11/25	06/11/25	Implementation Benefits Consultant

●	Client Review and Feedback on Benefit Report Audit	06/12/25	06/18/25	White Cap Project Team
●	Audit Updates	06/19/25	06/23/25	Implementation Analyst
●	Resolve any remaining Validation, Recalc errors	06/24/25	06/25/25	Implementation Analyst
●	Data Review and Sign Off	06/26/25	06/27/25	White Cap Project Team
●	Pre-Go Live Checklist	06/26/25	06/30/25	Implementation Benefit Consultant
●	Admin Training Refresher	06/30/25	06/30/25	Implementation Benefits Consultant
●	Enable system automation rules	06/30/25	06/30/25	Implementation Analyst
●	Audit Checkpoint #2	06/30/25	06/30/25	Implementation Project Manager
●	Provide CCT confirmation of client system active date to prepare for reporting	06/30/25	06/30/25	Implementation Project Manager
	Stage 6 - Active Site	07/01/25	07/31/25	
●	EDI Checkpoint - Go Live	07/01/25	07/01/25	Implementation Project Manager
●	Client Site Activation	07/01/25	07/01/25	Implementation Project Team
●	Post Go Live Transition	07/01/25	07/07/25	Transition Specialist
●	Post Go-Live Transition Fail Process (if applicable)	07/08/25	07/10/25	Implementation Project Team
●	Post-Activation Wrap-up	07/02/25	07/31/25	Implementation Project Team
	COBRA Administration	03/18/25	05/02/25	
●	COBRA Lift Off	03/18/25	04/01/25	COBRA Project Manager
●	Review Onboarding Information	03/18/25	03/18/25	COBRA Project Manager
●	Verify COBRA Contacts	03/18/25	03/19/25	COBRA Project Manager
●	Create Intake Forms	03/18/25	03/18/25	COBRA Project Manager
●	Send Kickoff Email to Client with Forms	03/18/25	03/18/25	COBRA Project Manager
●	Confirm EDI Cases have been created	03/19/25	03/19/25	COBRA Project Manager
●	Confirm carrier files will be sending COBRA enrollments	03/20/25	03/20/25	COBRA Project Manager
●	Update Client Benefits page in Salesforce	03/21/25	03/21/25	COBRA Project Manager
●	Complete & Return signed Intake form, ACH and Carrier Authorization	03/21/25	03/28/25	White Cap Project Team
●	Configure COBRA system by FEIN	03/31/25	03/31/25	COBRA Analyst
●	Pull COBRAPoint Structure & attach to Salesforce EDI QE/DOL Cases	04/01/25	04/01/25	COBRA Analyst
●	Internal QA	03/31/25	04/08/25	COBRA Analyst
●	Submit for System QA	03/31/25	03/31/25	COBRA Analyst
●	Internal QA of COBRA system	04/01/25	04/02/25	COBRA Analyst
●	Send COBRAPoint Export to Client for review and sign off	04/03/25	04/03/25	COBRA Project Manager
●	Sign off on COBRAPoint Client Export	04/04/25	04/08/25	White Cap Project Team

●	Data	04/04/25	04/21/25	COBRA Project Manager
●	Complete Cobra Takeover Template	04/04/25	04/11/25	White Cap Project Team
●	Review COBRA Takeover Template and attach to the project/milestone	04/14/25	04/14/25	COBRA Project Manager
●	Generate & Review COBRA Qualifier Letters	04/15/25	04/15/25	COBRA Project Manager
●	Submit Qualifier Letters for Printing	04/16/25	04/16/25	COBRA Analyst
●	Send COBRA Training and CP Login information to client	04/17/25	04/17/25	COBRA Analyst
●	Review COBRA Takeover Template for potential revisions/errors	04/15/25	04/16/25	COBRA Analyst
●	COBRA Participants uploaded to COBRA system	04/17/25	04/17/25	COBRA Analyst
●	Import Coverage data into BenAdmin system	04/17/25	04/17/25	COBRA Analyst
●	Set up Open Enrollment plans (if applicable)	04/18/25	04/18/25	COBRA Analyst
●	Complete COBRA Data QA	04/21/25	04/21/25	COBRA Analyst
●	Receive updates from group	04/22/25	05/01/25	COBRA Project Manager
●	Complete Updates in COBRAPoint and ben Admin	04/22/25	05/01/25	COBRA Analyst
●	Client Live	05/01/25	05/01/25	COBRA Project Manager
●	Complete Internal Transition Doc	05/01/25	05/01/25	COBRA Project Manager
●	COBRA Go Live	05/01/25	05/01/25	COBRA Project Manager
●	Transition	05/02/25	05/02/25	COBRA Project Manager
●	Send final transition email to group/broker	05/02/25	05/02/25	COBRA Project Manager
	Employee Contact Center	03/18/25	04/30/25	
●	Send intake form to the client	03/18/25	03/18/25	Implementation Project Manager
●	Client returns intake form	03/19/25	03/21/25	CCEC Analyst
●	Record prompt and submit to Systems Analyst	03/19/25	03/21/25	CCEC Analyst
●	Order custom toll-free phone number	03/21/25	03/21/25	CCEC Analyst
●	Provide SPD documents/EE materials for each Benefit	03/24/25	03/28/25	CCEC Analyst
●	Build Client Benefits Page	03/31/25	04/04/25	CCEC Analyst
●	Build Plan information pages	03/31/25	04/04/25	CCEC Analyst
●	Review workflows with client and answer questions then update CB page	04/07/25	04/15/25	CCEC Analyst
●	Update marketing flyer	04/16/25	04/16/25	White Cap Project Team
●	Provide marketing flyer / call center contact information to client	04/17/25	04/17/25	CCEC Analyst
●	Update CBP w/any revised info	04/16/25	04/16/25	CCEC Analyst
●	Client sign off	04/18/25	04/23/25	CCEC Analyst
●	Create training presentation for call center	04/24/25	04/25/25	CCEC Analyst
●	Send out training to call center	04/28/25	04/28/25	CCEC Analyst
●	Implement & Test Phone Number	04/29/25	04/30/25	CCEC Analyst
	Benefit Outsourcing Support	03/18/25	04/15/25	

●	Review EA Standard Approach to Workflows	03/18/25	03/18/25	Implementation Project Manager
●	Open Enrollment Workflow	03/19/25	04/08/25	Implementation Project Manager
●	Determine OE Start/End	03/19/25	04/08/25	White Cap Project Team
●	Determine Active or Passive	03/19/25	04/08/25	White Cap Project Team
●	Verify User ID / Password Format	03/19/25	04/08/25	Implementation Project Manager
●	Determine EE Notification/Reminder(s)	03/19/25	04/08/25	White Cap Project Team
●	Dual Enrollment Process	03/19/25	04/08/25	Implementation Project Manager
●	Identify Overage Dependent(s) after OE	03/19/25	04/08/25	Implementation Project Manager
●	Identify / Resolve Dual Enrollment Changes	03/19/25	04/08/25	Implementation Project Manager
●	New Hire Workflow	03/19/25	04/08/25	Implementation Project Manager
●	Implement Import Data Process	03/19/25	04/08/25	White Cap Project Team
●	Determine Interim Data flow (if needed)	03/19/25	04/08/25	Implementation Project Manager
●	Determine New Hire Notification/Reminder(s)	03/19/25	04/08/25	White Cap Project Team
●	New Hire Rules / RACI	03/19/25	04/08/25	Implementation Project Manager
●	EOI Process Requirements	03/19/25	04/08/25	Implementation Project Manager
●	Define Carrier EOI workflow	03/19/25	04/08/25	Implementation Project Manager
●	Implement EOI Process (link, online form)	03/19/25	04/08/25	Implementation Project Manager
●	EOI Reminder - Outreach Process	03/19/25	04/08/25	Implementation Project Manager
●	Post Transition - review/remove outdated pending EOIs	03/19/25	04/08/25	Implementation Project Manager
●	Life Events Workflows	03/19/25	04/08/25	Implementation Project Manager
●	Determine Interim Data flow (if needed)	03/19/25	04/08/25	Implementation Project Manager
●	Define Life Event Rules & Triggers	03/19/25	04/08/25	Implementation Project Manager
●	Confirm Dep Verification Process / Approvals	03/19/25	04/08/25	Implementation Project Manager
●	Set up Document Request Requirements	03/19/25	03/24/25	Implementation Project Manager
●	Termination Process (aging out deps, Cobra)	03/19/25	04/08/25	Implementation Project Manager
●	Confirm Cobra workflow	03/19/25	04/08/25	Implementation Project Manager
●	Confirm Aging Out Dependent workflow	03/19/25	04/08/25	Implementation Project Manager
●	QMCSO Process flow	03/19/25	04/08/25	Implementation Project Manager
●	Determine Process Flow	03/19/25	04/08/25	Implementation Project Manager
●	Define QMCSO Benefits & Triggers	03/19/25	04/08/25	Implementation Project Manager

●	Confirm Dep Verification Process / Approvals	03/19/25	04/08/25	Implementation Project Manager
●	Termination Process (QMCSO)	03/19/25	04/08/25	Implementation Project Manager
●	Confirm Notification to Employee Workflow	03/19/25	04/08/25	Implementation Project Manager
●	Define Urgent Eligibility Workflow & Process	03/19/25	04/08/25	Implementation Project Manager
●	Define/document exception process	03/19/25	04/08/25	Implementation Project Manager
●	Review and Sign off with Client	03/19/25	04/08/25	White Cap Project Team
●	Identify Support Service Team	04/09/25	04/15/25	Implementation Project Manager
●	PlanSource Contact Information to Client	04/09/25	04/15/25	Implementation Project Manager
●	Client Contact Information to PlanSource	04/09/25	04/15/25	White Cap Project Team
●	Client Specific Training Conducted	04/09/25	04/15/25	Implementation Project Manager
	ACA	01/31/25	03/31/25	
●	Lift-Off	01/31/25	02/25/25	Implementation Project Manager
●	Create ACA Requirements Guide and attach to the ACA Milestone	01/31/25	01/31/25	Implementation Project Manager
●	Send ACA Introduction Email to client/broker with ACA Requirements Guide	01/31/25	01/31/25	Implementation Project Manager
●	Turn on ACA Lookback and ACA State Transmission in System Mgt / Licensing	01/31/25	01/31/25	Implementation Benefits Consultant
●	Save client/broker contact names and e-mail addresses on the ACA Milestone	02/03/25	02/03/25	Implementation Project Manager
●	Complete and return ACA Requirements Guide	02/03/25	02/05/25	White Cap Project Team
●	ACA Requirements Guide reviewed by BC and saved to the ACA Milestone	02/06/25	02/06/25	Implementation Project Manager
●	Send email to schedule ACA Introduction call	02/06/25	02/06/25	Implementation Project Manager
●	Hold ACA Introduction call with client & broker	02/07/25	02/13/25	Implementation Project Manager
●	Attach updated ACA Requirements Guide to ACA Milestone	02/14/25	02/14/25	Implementation Project Manager
●	Send updated ACA Req. Guide and Timeline Acceptance form for client signoff	02/14/25	02/14/25	Implementation Project Manager
●	Review FINAL ACA Req. Guide for accuracy & completeness	02/14/25	02/14/25	Implementation Benefits Consultant
●	Save FINAL ACA Req. Guide & Timeline Acceptance form to ACA Milestone	02/14/25	02/14/25	Implementation Project Manager
●	Create EE Census and Benefit Reports / Complete Data Reqs to send to PM	02/14/25	02/14/25	Implementation Benefits Consultant
●	Send data requirements email to client and schedule ACA Data call	02/17/25	02/17/25	Implementation Project Manager
●	If needed, request SFTP via Application Support ticket	02/18/25	02/21/25	Implementation Benefits Consultant
●	Configure SFTP once site has been created	02/24/25	02/25/25	Implementation Benefits Consultant

●	Configuration	02/17/25	02/20/25	ACA Analyst
●	Build ACA populations	02/17/25	02/19/25	ACA Analyst
●	Update Data field security	02/17/25	02/19/25	ACA Analyst
●	Update appropriate benefit populations to include ACA measured employees	02/17/25	02/19/25	ACA Analyst
●	Build BE - Headcount population	02/17/25	02/19/25	ACA Analyst
●	Configure ACA Tool via ACA / Configuration	02/17/25	02/19/25	ACA Analyst
●	Attach completed Submitted ACA QA Checklist to the ACA Milestone	02/20/25	02/20/25	ACA Analyst
●	Notify CA2 and PC project is ready for reviewed QA	02/20/25	02/20/25	ACA Analyst
●	Quality Assurance	02/20/25	02/20/25	ACA Analyst
●	Complete Reviewed QA Checklist	02/20/25	02/20/25	Implementation Analyst
●	Attach completed Reviewed QA Checklist to the ACA Milestone	02/20/25	02/20/25	Implementation Analyst
●	Data	02/21/25	03/17/25	Implementation Project Manager
●	Hold ACA Data call to review data requirements with client/broker	02/21/25	02/27/25	Implementation Benefits Consultant
●	Import all requested data requirements	02/28/25	03/14/25	White Cap Project Team
●	Confirm all data requirements have successfully imported into Ben Admin	03/17/25	03/17/25	Implementation Benefits Consultant
●	Send test file via SFTP process	03/17/25	03/17/25	Implementation Benefits Consultant
●	Validate data in SFTP test file	03/17/25	03/17/25	Implementation Benefits Consultant
●	Testing/Client Live	03/17/25	03/26/25	Implementation Benefits Consultant
●	Enable ACA Engine and run ACA calculation twice	03/17/25	03/17/25	Implementation Benefits Consultant
●	Review ACA Calculation report and advise client to correct as needed	03/18/25	03/19/25	Implementation Benefits Consultant
●	Run and Review ACA Monitoring Report and address potential penalties	03/18/25	03/19/25	Implementation Benefits Consultant
●	Review ACA Measurement Report as necessary	03/18/25	03/19/25	Implementation Benefits Consultant
●	Complete ACA Testing: review employee record from each Employment Level	03/18/25	03/20/25	Implementation Benefits Consultant
●	Save preliminary ACA admin training zip file to ticket in ticket center	03/21/25	03/24/25	Implementation Benefits Consultant
●	Enable ACA Notifications	03/21/25	03/24/25	Implementation Benefits Consultant
●	Enable ACA Automations	03/21/25	03/24/25	Implementation Benefits Consultant
●	Schedule ACA Monitoring report for client to receive every 2 weeks	03/21/25	03/24/25	Implementation Benefits Consultant
●	BC sends testing results to PM to include in Testing & Admin Training email	03/25/25	03/26/25	Implementation Benefits Consultant
●	Schedule meeting with client to review potential penalties	03/20/25	03/26/25	Implementation Project Manager
●	Send testing results and ACA Admin Training information to client	03/20/25	03/26/25	Implementation Project Manager

●	Final QA/Transition	03/27/25	03/31/25	Implementation Project Manager
●	Open Case and assign to ACA Ongoing Support Team to review configuration	03/27/25	03/27/25	Implementation Project Manager
●	Complete the ACA Transition Checklist and attach to the ACA Milestone	03/27/25	03/27/25	Implementation Project Manager
●	Review the ACA Transition Checklist	03/28/25	03/28/25	Implementation Benefits Consultant
●	Email Service Team that project is done and ready for transition	03/31/25	03/31/25	Implementation Project Manager
●	Open case for 1:1 ACA Admin training and assign to Ongoing ACA Support team	03/31/25	03/31/25	Implementation Project Manager
●	Send Closing email to client/broker	03/31/25	03/31/25	Implementation Project Manager
	Billing Payment and Reconciliation	02/03/25	03/27/25	
●	Review Standard Invoice/Remit Process Flow Call with Client	02/03/25	02/03/25	Carrier Billing Analyst/ White Cap Project Team
●	Provide Billing Checklist	02/04/25	02/10/25	Carrier Billing Analyst
●	Complete Billing Checklist	02/11/25	02/19/25	White Cap Project Team
●	Carrier Billing Contacts identified	02/11/25	03/11/25	White Cap Project Team
●	Carrier Auth Form Received (if applicable)	02/11/25	02/24/25	White Cap Project Team
●	Submit carrier requirements (per carrier) - Access and ACH Information	02/11/25	02/11/25	Carrier Billing Analyst
●	Billing Method Requirement per Carrier(s)	02/12/25	02/12/25	Carrier Billing Analyst
●	Billing Method Delivery per Carrier(s)	02/12/25	02/12/25	Carrier Billing Analyst
●	Receive requested information (each carrier)	02/12/25	03/10/25	Carrier Billing Analyst
●	Define Financial Reporting Structure/Billing Populations Needed	03/11/25	03/11/25	White Cap Project Team
●	Provide Client Contact for Payments	03/11/25	03/11/25	White Cap Project Team
●	Determine Client Payment Method - ACH Push or ACH Debit	03/11/25	03/11/25	White Cap Project Team
●	Review documents to determine if all data has been acquired	03/12/25	03/13/25	Carrier Billing Analyst
●	Set up carrier billing Configuration	03/14/25	03/21/25	Carrier Billing Analyst
●	Complete Benefit Config & Rates	03/14/25	03/18/25	Carrier Billing Analyst
●	Audit Billing Configuration	03/19/25	03/21/25	Carrier Billing Analyst
●	Set up Client Payment Process (wire, ach)	03/24/25	03/25/25	Carrier Billing Analyst
●	Schedule First Consolidated Invoice to Client (Done monthly first month after go live)	03/26/25	03/27/25	Carrier Billing Analyst
	FLEX (FSA HSA, HRA)	02/03/25	03/26/25	
●	Countdown	02/03/25	02/06/25	
●	Join Launch kick-off call (if applicable)	02/03/25	02/03/25	FLEX Analyst
●	Pre-fill intake form with Ben Admin data	02/03/25	02/03/25	FLEX Analyst

●	Send intake form and schedule introduction call	02/03/25	02/06/25	FLEX Analyst
●	Introduction Call	02/07/25	02/07/25	
●	Meeting to review intake form	02/07/25	02/07/25	FLEX Analyst
●	Confirm Reimbursement Options (FSA, HSA, HRA)	02/07/25	02/07/25	FLEX Analyst
●	Review Timeline	02/07/25	02/07/25	FLEX Analyst
●	Review Intake Form	02/07/25	02/07/25	FLEX Analyst
●	Determine Payroll Contribution (part of intake)	02/07/25	02/07/25	Client Project Team
●	Determine Prefunding Decision (part of intake)	02/07/25	02/07/25	Client Project Team
●	Determine if group qualifies for Bulk Transfer Process (HSA Only)	02/07/25	02/07/25	FLEX Analyst
●	Review ongoing support team (NueSynergy) and notify of portal training	02/07/25	02/07/25	FLEX Analyst
●	Confirm if client wants Plan Documents and NDT for Program (if applicable)	02/07/25	02/07/25	FLEX Analyst
●	Notify client of Rollover/Takeover Requirements (if applicable)	02/07/25	02/07/25	FLEX Analyst
●	Provide Takeover/Rollover Template (if applicable)	02/07/25	02/07/25	FLEX Analyst
●	Send follow-up email with completed Intake Form to the client for signoff	02/10/25	02/10/25	FLEX Analyst
●	Complete/Sign/Return Group Intake Form	02/11/25	02/13/25	Client Project Team
●	Configuration	02/14/25	02/25/25	
●	Send intake form to NueSynergy Implementation Inbox	02/14/25	02/14/25	FLEX Analyst
●	NueSynergy builds system	02/17/25	02/25/25	External Carrier
●	Quality Assurance	02/26/25	02/26/25	FLEX Analyst
●	NueSynergy completes QA of WCA build	02/26/25	02/26/25	External Carrier
●	Data	02/27/25	03/12/25	FLEX Analyst
●	Submit Salesforce cases for EDI IB and IZ files / Audit Cases	02/27/25	02/27/25	FLEX Analyst
●	Update Contact Center Salesforce Information	02/27/25	02/27/25	FLEX Analyst
●	Return completed Takeover Template (if applicable)	02/28/25	03/04/25	Client Project Team
●	Send Takeover Template to NueSynergy (if applicable)	02/28/25	02/28/25	FLEX Analyst
●	NueSynergy completes the data load from the takeover template	03/03/25	03/03/25	External Carrier
●	Data imported to NueSynergy via EDI	03/04/25	03/12/25	EDI Analyst
●	Client Live	03/13/25	03/13/25	
●	Confirm enrollments have loaded in WCA (EDI file is active)	03/13/25	03/13/25	FLEX Analyst
●	Grant NueSynergy Read Only access to the client in Ben Admin	03/13/25	03/13/25	FLEX Analyst
●	Client Live (date depends on Launch go live/plan start date)	03/13/25	03/13/25	FLEX Analyst
●	Post-Election Process	03/13/25	03/26/25	FLEX Analyst
●	Debit Card Distribution (HSA Only)	03/13/25	03/26/25	FLEX Analyst
●	Transition	03/14/25	03/14/25	FLEX Analyst
●	Move to NueSynergy Ongoing Support	03/14/25	03/14/25	FLEX Analyst

