CLIENTS ROADMAP TO SUCCESS

GO!

Groups Renewals
Existing client – obtain renewal
New client – obtain census & bills

CAUTION!

Be aware of **DEADLINES:**
Existing Clients must have renewal 60 days in advance!

RFP to Market

CAUTION!

Be aware of **DEADLINES:**
10 day turnaround

Once all quotes are received, input data in XLS for group presentation

STOP

ACCURACY CHECK

Presentation to Group

Enrollment Material:
Employer Applications
Employee: Hire Kits

STOP

ACCURACY CHECK

Enrollment Meeting
Clients with NO changes: Present new material with updated rates
Clients changing carriers: Enrollment meeting with updated info and rates

CAUTION!

Be aware of **DEADLINES:**
Have enrollment material returned to SB in a timely manner to ensure the groups effective date and ablity to verify groups benefits

Group Submission:
Scrub applications, create employee election worksheet, audit for missing information and schedule important follow up days in ACT for acct mgr.

STOP

ACCURACY CHECK

Submit enrollment to carrier within 48 hours

CAUTION!

Be aware of **DEADLINES: Follow up with carrier for missing information within 5 days to ensure a timely effective date and verification of benefits**

Final rates SHOULD be received within 10 days from group submission – audit against employee election worksheet

Final rates to group for signature & submit to carrier

Create Welcome letter(s) and termination letter(s), if applicable, for signature.

STOP

WHEN GROUP IS COMPLETE – REMEMBER to SUBMIT TERMINATION LETTER TO OLD CARRIER!!!

14 days from submission – ID cards received / benefits being verified?

Danger!

45 days from enrollment, obtain bill(s)& audit election worksheet for accuracy

STOP

ACCURACY CHECK

45 days from effective date, add YES / NO in ACT for Vitality, Newsletters, Turkey and Christmas cards

60 days out – employee satisfaction survey

6 month check up – group maintenance

START OVER!!