

# IMPLEMENTATION MILESTONES & TIMELINES

Below is an outline of each phase of the Clarity implementation process.

## PRE-ONBOARDING IMPLEMENTATION MILESTONES



### Welcome Email

The implementation contact receives emailed instructions for registering on the Clarity Portal and accessing the Implementation tool.



### Implementation Tool Access

Register on the Clarity Portal navigate to the Implementation Tool in the Clarity Portal (link in email or in Manage menu)



## Complete/ Validate Data

### Client/Broker Actions:

- Company Profile
- Funding Information
- Employee Benefit Plans
- Direct Bill Plans and Rates
- COBRA Plans and Rates
- Plan SBCs

### Clarity Actions:

- Recap email provided

The portal submissions should be completed within two weeks of notification that the implementation is available for you or as soon as you have all required information available.



## Configuration

### Clarity Actions:

- System Setup on Employee Benefit/COBRA platforms
- Internal Audits
- Direct Bill Enrollment template provided (if applicable)
- COBRA Takeover Template provided (if applicable)

### Client/Broker Actions:

- COBRA Rates are reviewed
- Direct Bill Rates are reviewed

Configuration in our system takes approximately 3-5 business days from receipt of all portal documentation.



## Enrollment Provided

### Client/Broker Actions:

- Active Employee Census uploaded to Clarity portal
- Completed Enrollment template uploaded to Clarity portal
- Completed COBRA takeover data uploaded to Clarity portal
- Completed Direct Bill enrollment template uploaded to Clarity Portal

### Clarity Actions:

- Employee Benefits enrollments processed
- COBRA takeovers loaded
- COBRA Open Enrollment scheduled (if applicable)
- Direct Bill enrollments loaded

Enrollments are processed within 2-3 business days of receipt/system configuration being completed.



## GO LIVE

### Clarity Actions:

- Welcome email sent to Employee Benefits participants, Clarity cards issued
- Employee Benefits Prefund collected (not applicable to HSA plans)
- COBRA takeover notices/coupon books sent to Qualified Beneficiaries
- Direct Bill enrollment notices/coupon books sent to Participants



## Post Implementation Activities

### Clarity Actions:

- Introduction to Relationship Management team as primary point of contact moving forward
- Platform Training available upon request

### Client/Broker Actions:

- Employee Benefit contributions posted (if applicable)