

# Sample Client 2022 PEO Transition Calendar

Account Information	EPIC Team	Client
Client:	<b>Sample Client</b>	CFO
Plan Start Date:	<b>January 1, 2023</b>	Director of HR
Open Enrollment:	<b>October 2022</b>	HR Manager

Month	Action Item	Responsible Party	Notes
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<b>July</b>	Request an updated census from Client	EPIC	Updated census needed for January 1st quotes <b>Request by July 22nd</b>
	Updated Census Provided	Client	<b>July 27th</b>
	RFP sent to all insurance carriers asking for bids	EPIC	<b>July 29th</b>
<b>September</b>	Bids due back from Insurance carriers	Carriers	<b>September 1st</b>
	Preparation of the Marketing results	EPIC	<b>September 1st to September 7th</b>
	Present the Final Results of the Marketing	EPIC	<b>September 10th</b>
<b>October</b>	Final Decision made on Benefits for June 1st	Client	<b>October 17th</b>
	Carriers notified of decisions made	EPIC	<b>October 18th</b>
	Enrollment materials ordered from carriers	EPIC	<b>October 18th</b>
	On Line Enrollment vendor notified of decisions	EPIC	<b>October 18th</b>
	HRIS Implementation/Training Begins	Client & HRIS vendor	<b>October 21st</b>
	<b>On Line Enrollment vendor starts connections, testing</b>	<b>Client &amp; HRIS vendor</b>	<b>October 26th</b>
	Brochure / Benefit Guide drafts sent to Client	EPIC	<b>October 26th</b>
<b>November</b>	<b>Set up New Employee Files</b>	<b>Client &amp; HRIS vendor</b>	<b>October 26th</b>
	<b>Conduct new employee Orientations</b>	<b>Client &amp; HRIS vendor</b>	<b>October 26th</b>
	Enrollment materials arrive at Client	Carriers	<b>October 26th</b>
	Brochure is finalized and Printed	Client & EPIC	<b>November 3rd</b>
	Brochures and OE Materials delivered to Client	EPIC	<b>November 8th</b>
On Line Enrollment vendor advises which carrier connections are done	HRIS Vendor	<b>November 8th</b>	
Distribute Medicare Part D and compliance notice to Client	EPIC	<b>November 8th</b>	
<b>COBRA Enrollment Kits are sent out.</b>	<b>EPIC &amp; COBRA vendor</b>	<b>November 8th</b>	
Open Enrollment Begins	Client & EPIC	<b>November 13th</b>	
Open enrollment meetings	Client & EPIC	<b>November 13th to November 20th</b>	
<b>Parallel Payroll Runs</b>	<b>Client &amp; Payroll vendor</b>	<b>Twice during November</b>	
Open Enrollment Ends	Client & EPIC	<b>November 24th</b>	
Changes are approved in the Enrollment system	Client	<b>November 29th</b>	
<b>December</b>	EDI files are sent from the On Line enrollment vendor to carriers	HRIS Vendor	<b>December 6th</b>
	<b>OR Excel files if the connections are not in place!</b>		
	Carriers confirm that they received the file	Carriers	<b>December 8th</b>
	Employees enrolled in the plans	Carriers	<b>December 12th</b>
ID cards are mailed to employees homes	Carriers	<b>December 15th</b>	
ID cards are delivered to employees homes	Carriers	<b>December 26th</b>	
<b>January</b>	<b>HR/Payroll Go Live</b>	<b>Client &amp; Payroll Vendor</b>	<b>January 1st</b>
	Client to review / audit bills for accuracy	Client	<b>January 5th</b>
	Administration Meetings with any new carriers	Client & EPIC	<b>January 11th</b>
	Draft of the SPD's / Plan Document delivered to EPIC	Carriers	<b>January 25th</b>

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2022 PEO Transition Calendar**

**Account Information**

Client: **Sample Client**  
 Plan Start Date: **January 1, 2023**  
 Open Enrollment: **October 2022**

**EPIC Team**

Team Lead:  
 Consultant  
 Account Mgr.  
 Asst. Acct Mgr.

**Client**

CFO  
 Director of HR  
 HR Manager

Month	Action Item	Responsible Party	Notes
<b>February</b>	Review of the SPD's	EPIC	<b>February 17th</b>
	Finalize the SPD's / Plan Documents	EPIC & Carriers	<b>February 30th</b>
	Provide Soft copies & hard copies of SPD	Carriers	<b>February 31st</b>
<b>March</b>	Check with Client on any outstanding issues	EPIC	<b>March 4th</b>
<b>April</b>	Check with Client on any outstanding issues	EPIC	<b>April 1st</b>
	Medicare Part D Notices sent out	Client & EPIC	<b>April 15th</b>
<b>May</b>	Semi Annual Meeting	Client & EPIC	<b>May 15th</b>