

Open Enrollment Project Timeline

OE RENEWAL DATE: 1/1/23 TARGETED OE LAUNCH DATE: 11/15/22

ACTIVITY	DUE DATE (E)	DUE DATE	OWNER	DETAILS
Send OE Welcome Email	9/8/22	~ 115 days prior to renewal date	Paycor Open Enrollment Consultant	Includes OE timeline, kickoff call request, monthly rate template, BRD, and questionnaire.
OE Kickoff Call	9/16/22	45 days prior to launch	Client/Broker	Review completed questionnaire and discuss any changes that will take place during the upcoming renewal.
Return Renewal Documents	10/21/22	25 days prior to launch	Client/Broker	Return completed monthly rate template, BRD, and any other applicable documents (SBC's, SBD's, etc.).
Benefit Build in Progress	11/4/22	2 weeks from date <u>all</u> documents received	Paycor Open Enrollment Consultant	Once <u>all</u> documents are received. All necessary updates within the system based on monthly rate template and BRD received. Important: timeline (2 weeks) starts once all documents are received.
External Client Experience Testing	11/7/22	Provided once the updated have been completed	Paycor Open Enrollment Consultant	Paycor will send out the guided testing plan. Client/broker to test all updates completed within the system to ensure the updates were captured correctly.
Client Returns Sign Authorization Form	11/12/22	2 days prior to launch	Client/Broker	Once the system has successfully be reviewed. Client/broker is to sign and return the Authorization Form. This is required to go live for Open Enrollment.
OE Launched	11/15/22		Paycor Open Enrollment Consultant	System is now live for employees to review and make any necessary updates to their benefits for the upcoming plan year.
EDI Files Sent (if applicable)	12/18/22	2 weeks prior to plan renewal date	Paycor EDI Consultant	Dates are tentative and based on carrier requirements.
Client Tranferred to Support	1/13/23	Client/Broker	Paycor Open Enrollment Consultant	The Open Enrollment project will be closed. Outreach will be made to the client letting them know if they need further assistance they can reach out Support (support@paycor.com) for further assistance.