

Clarke & Company Timeline for a January 1st Renewal

Here's a timeline that details a suggested path to partnership for administration and communication support of the SC Pediatric Alliance.



08/01/2023 | *Phase 1 ~ Discovery*

Understanding Current Vendors, Products, and Costs

- Copy of carrier invoices needed
 - Medical, Dental, Vision, Short-Term Disability, Long-Term Disability, Accident, Critical Illness, Hospital Indemnity, Voluntary Term Life
- Review Open Enrollment Marketing material for 2022 Benefit Year

Clarke & Company Value

- Assess Product Portfolio & Gauge Cost Competitiveness
 - Evaluate Wellness Plan and identify areas for improvement
 - Analyze Product Compatibility with Payroll Integration
- Meet with BCBS Underwriting Team to review SCPA Claims and Plans**

08/15/2023 | *Phase 2 ~ Present Findings*

Uncovering Pain Points

- Product Redundancy
- Above average premium and coverage
- Potential "over enrollment"
- **Review Renewal with SCPA and Prepare RFP if Needed**

Clarke & Company Value

- Build Sample Open Enrollment Communication Portal
- Sample Enrollment Guide to client for review



09/01/2023 | *Phase 3 - Administrative Process & Technology*

Identifying Client Needs

- Meet with Human Resources team to identify the process for new hires, open enrollment, payroll, benefit administration platform, and cobra
- Provide Clarke & Company with all in force product contracts, summaries and payroll deductions for supplemental products

Clarke & Company Value

- Vendor selection based on efficiency and capabilities
- Product and Administrative recommendations based on integration, compatibility and compliance needs
- Provide cost comparison of all products
- Offer feedback on competitive options and suggestions



09/15/2023 | Phase 4~ Final Presentation

- Carrier & Technology Vendor Recommendations
- Implementation Timeline for a successful 2023 Open Enrollment

Clarke & Company Value Proposition

- Understanding support and service available by moving coverages under Clarke & Company umbrella
- Provide Administrative Cost Value



10/30/2023

- Close Open Enrollment
- Prepare Payroll Deduction Report
- Make sure EDI files are sent to carrier partners correctly



CLARKE & COMPANY
BENEFITS LLC

10/01/2023 | Phase 5~Implementation

- Data Files for all carrier plans - Full extract
- Costs and Plan Design of all plans
- System Rules and Setup
- Testing Phase
- Production Phase
- HR Training of platform
- **Open Enrollment**
- Employee Meetings
- Webinars
- Build Employee Communication Material and Web Tools

Nov thru Dec

Ongoing Communication

- Develop communication strategy to drive participation in wellness plans
- Identify other ways to enhance employee wellness experience
- Market and educate employees on potential Health Incentive Account program that can be implemented in conjunction with the medical plans at BCBS

