**How**

* A welcome email is sent from COBRA Implementation to assist you with all required documents and next steps
* Client portal access to the COBRA website is coordinated and credentials are provided
* Education is given for ongoing administration, as needed

**What**

Required Implementation Documents:

* Plan and rate information
* Carrier assignment form(s)
* Billing setup form(s)
* Takeover records
* Active insurance invoice

**WHEN**

* Signed sales agreement to be completed **30** days prior to the effective date
* Fully executed implementation documents to be returned by the **10th** of the month prior to the effective date

## Sample Timeline Subheading

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | 1  Contract outline  Signed agreement is submitted by the sales agent | 2  Email outline  Welcome email is sent to the client/ broker | 3  Clipboard Partially Checked outline  Required  documents are reviewed | 4 | 5 |
| 6 | 7 | 8 | 9 | 10  Checklist outline  Completed  documents submitted to BRI | 11  Gears outline  Plan setup begins | 12 |
| 13 | 14\* | 15 | 16 | 17 | 18 | 19 |
| 20 | 21  Mailbox outline  Takeover  notices are sent | 22 | 23 | 24 | 25 | 26 |
| 27 | 28  Computer outline  Members register for portal and begin making payments | 29  Handshake outline  Dedicated account administrator is introduced | 30 | 31 | 1  Star  BRI COBRA/Direct Billing Administration effective date |  |

\*If EDI files are being used for ongoing qualifying events and/or new hires, the client must request this service from their payroll or HRIS vendor. Account structure is provided once plans and rates are built in the BRI COBRA system. This process may take 6-8 weeks to complete. In the interim, events can be reported using the portal.