**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

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | 1Contract outlineSigned agreement is submitted by the sales agent | 2Email outlineWelcome email is sent to the client/ broker  | 3Clipboard Partially Checked outlineRequireddocuments are reviewed | 4 | 5 |
| 6 | 7 | 8 | 9 | 10Checklist outlineCompleteddocuments submitted to BRI | 11Gears outlinePlan setup begins | 12 |
| 13 | 14\* | 15 | 16 | 17 | 18 | 19 |
| 20 | 21Mailbox outlineTakeovernotices are sent | 22 | 23 | 24 | 25 | 26 |
| 27 | 28Computer outlineMembers register for portal and begin making payments | 29Handshake outlineDedicated account administrator is introduced  | 30 | 31 | 1StarBRI 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.