

SAMPLE CLIENT

Timeline for 1/1/2021 New Client Implementation



Legend

- ✓ Complete
- ✗ Due to complete within 7 days
- ◆ Should have started
- Should have completed

#	Status	Task Name	Owner	Resources	Start	Finish	Complete	Notes / Dependencies
0		SAMPLE CLIENT - effective 1/1/2021			7/1/2020	2/7/2021	0%	
1		INFORMATION GATHERING						
2		Request initial implementation documents	ESI	IPM	7/1/2020	7/5/2020	0%	
3		Provide current SPD's and benefit documents	Client	Client	7/1/2020	7/5/2020	0%	
4		Provide proposed account structure	Client	Client	7/1/2020	7/5/2020	0%	
5		Provide copay intent	Client	Client	7/1/2020	7/5/2020	0%	
6		INITIATING IMPLEMENTATION						
7		Kickoff meeting	ESI/ Client	ESI/ Client	7/5/2020	7/5/2020	0%	
8		Distribute meeting notes and BID from the kickoff meeting	ESI	IPM	7/5/2020	7/8/2020	0%	
9		BENEFIT INTENT						
10		<i>Benefit design</i>						
11		Review benefit design	ESI/ Client	IPM & Client	7/5/2020	7/12/2020	0%	
12		<i>Coordination of benefits</i>						
13		Review coordination of benefits	ESI/ Client	IPM & Client	7/5/2020	7/10/2020	0%	
14		COB discussion with product team	ESI/ Client	ESI Product Team/ IPM/ Client	7/5/2020	7/10/2020	0%	
15		<i>Copay</i>						
16		Create copay grid	ESI	IPM	7/5/2020	7/12/2020	0%	
17		Provide final copay grid for approval	ESI	IPM	7/12/2020	7/14/2020	0%	
18		Approve final copay grid	Client	Client	7/14/2020	7/19/2020	0%	
19		Build copays within ESI system	ESI	CBA	7/19/2020	9/2/2020	0%	
20		<i>Group structure</i>						
21		Create group structure	ESI	IPM	7/5/2020	7/12/2020	0%	
22		Provide final account structure for approval	ESI	IPM	7/12/2020	7/14/2020	0%	
23		Approval final group structure	Client	Client	7/14/2020	7/19/2020	0%	
24		Build group structure within ESI system	ESI	CBA	7/19/2020	9/2/2020	0%	
25		<i>Welcome kit communications</i>						
26		Discuss welcome kit communications	ESI/Client	IPM & Client	7/5/2020	7/12/2020	0%	
27		Provide logo for communication materials, if required	Client	Client	7/12/2020	7/19/2020	0%	
28		Provide welcome kit proof for review	ESI	IPM	7/19/2020	8/18/2020	0%	
29		Approve welcome kits	Client	Client	8/18/2020	8/23/2020	0%	
30		Distribute welcome kits	ESI	Mbr Comm	12/12/2020	12/26/2020	0%	Tied to loading production eligibility
31		<i>Client/vendor generated ID cards</i>						
32		Provide ID card proof for review	Client	Client	7/19/2020	8/18/2020	0%	
33		Approve ID card proof	ESI	IPM	8/18/2020	8/23/2020	0%	
36		<i>eBusiness tools (user access)</i>						

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37		Present eBusiness tools	ESI	IPM	7/5/2020	7/12/2020	0%	
38		Provide a list of users and their level of access	Client	Client	7/12/2020	7/17/2020	0%	
39		Send user IDs and passwords	ESI	IPM	7/17/2020	10/15/2020	0%	
40		Send training materials	ESI	IPM	10/15/2020	10/15/2020	0%	
41		<i>Claims files</i>						
42		Discuss claims files intent	ESI/ Client	IPM & Client	7/5/2020	7/12/2020	0%	
43		<i>Initial eligibility</i>						
44		Discuss initial eligibility intent	ESI/ Client	IPM & Client	7/5/2020	7/12/2020	0%	
45		<i>Review and appeals</i>						
46		Review appeals and conditions of coverage	ESI/ Client	IPM & Client	7/5/2020	7/12/2020	0%	
47		<i>Transition Strategy</i>						
48		Review transition strategy	ESI/ Client	IPM & Client	7/5/2020	7/12/2020	0%	
49		Provide finalized Benefit Intent Document	ESI	IPM	8/4/2020	8/4/2020	0%	
50		Approve Benefit Intent Document	Client	Client	8/4/2020	8/9/2020	0%	
51		CDH/SHARED ACCUMULATOR INTENT						
52		Hold CDH call to review shared accumulator intent document	ESI/ Client/ Medical Vendor	IPM/ CDH SME/ Client/ Medical Vendor	7/12/2020	7/15/2020	0%	
53		Provide final CDH/shared accumulators BID	ESI	IPM	7/15/2020	7/17/2020	0%	
54		Approve final CDH/shared accumulators BID	Client	Client	7/17/2020	7/18/2020	0%	
55		OPEN ENROLLMENT						
56		<i>Simple open enrollment</i>						
57		Provide open enrollment book of business website link	ESI	IPM	8/2/2020	8/9/2020	0%	
58		Provide open enrollment FAQ	ESI	IPM	8/9/2020	8/16/2020	0%	
59		<i>Plus open enrollment</i>						
60		Provide open enrollment client specific URL	ESI	IPM	8/9/2020	8/23/2020	0%	
61		Provide open enrollment FAQ	ESI	IPM	8/2/2020	8/16/2020	0%	
62		Provide additional PDF's for website, if applicable	ESI/ Client	IPM & Client	8/9/2020	8/14/2020	0%	
63		Confirm open enrollment is live	ESI	IPM	10/1/2020	10/1/2020	0%	
64		<i>Traditional open enrollment</i>						
65		Review open enrollment structure grid	ESI	IPM	8/2/2020	8/2/2020	0%	
66		Approve open enrollment structure grid	ESI	IPM	8/2/2020	8/4/2020	0%	
67		Provide open enrollment website link	ESI	IPM	8/4/2020	9/18/2020	0%	
68		Confirm benefit readiness for open enrollment	Client	Client	8/9/2020	9/18/2020	0%	
69		Confirm open enrollment is live	ESI	CBA	10/1/2020	10/1/2020	0%	

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70		Single Sign On (SSO), if applicable						
71		Engage Express Scripts product team	ESI	IPM/Product Team	8/4/2020	8/7/2020	0%	
72		Provide SSO Implementation guide	ESI	IPM	8/7/2020	8/9/2020	0%	
73		Review SSO implementation plan	ESI/Client	IPM & Client	8/9/2020	8/10/2020	0%	
74		Secure internal and external funding approvals	ESI/Client	IPM & Client	8/10/2020	8/13/2020	0%	
75		Obtain certificates	ESI/Client	IPM	8/13/2020	8/16/2020	0%	
76		Approve SSO requirements document	Client	Client	8/16/2020	8/18/2020	0%	
77		UAT (Client to ESI Testing)	ESI/Client	ESI/Client	8/18/2020	8/19/2020	0%	
78		Deployment to Production	ESI	Product Team	8/19/2020	8/22/2020	0%	
79		SSO Requirements Setup Complete	ESI	Product Team	1/1/2021	1/1/2021	0%	
80		Clinical & Utilization Management Decisions						
81		Provide clinical implementation document template, if applicable	ESI	IPM	7/8/2020	7/8/2020	0%	
82		Return completed clinical implementation document template	Client	Client	7/8/2020	7/15/2020	0%	
83		Provide any additional clinical program and coverage detail	Client	Client	7/8/2020	7/15/2020	0%	
84		Complete drug coverage mapping	ESI	Clinical IM	7/15/2020	7/20/2020	0%	
85		Hold clinical call to review clinical coverage	ESI	Clinical/IPM	7/20/2020	7/20/2020	0%	
86		Approve drug grid	Client	Client	7/20/2020	7/25/2020	0%	
87		Confirm formulary requirements	ESI/Client	IPM & Client	7/20/2020	7/25/2020	0%	
88		Approve clinical addendum	Client	Client	7/20/2020	7/25/2020	0%	
89		Eligibility						
90		Hold eligibility kick off call	ESI/Client	Elig Analyst	7/12/2020	7/19/2020	0%	
91		Establish eligibility file layout and transmission method	ESI	Elig Analyst	7/19/2020	7/19/2020	0%	
92		Provide eligibility statement of work (SOW) for approval	ESI	Elig Analyst	7/19/2020	7/24/2020	0%	
93		Approve eligibility statement of work (SOW)	Client	Client	7/24/2020	7/29/2020	0%	
94		Establish FTP with eligibility vendor	ESI	Elig Analyst	7/29/2020	9/27/2020	0%	
95		Eligibility test file						
96		Send eligibility test file	ESI	Elig Analyst	9/27/2020	10/2/2020	0%	
97		Review eligibility test file results	ESI/Client	ESI/Client	9/27/2020	9/29/2020	0%	
98		Approve eligibility test file results	Client	Client	9/29/2020	10/1/2020	0%	
99		Eligibility test file - retest, if applicable						
100		Send eligibility test file	ESI	Elig Analyst	10/25/2020	10/30/2020	0%	
101		Review eligibility test file results	ESI/Client	ESI/Client	10/1/2020	10/3/2020	0%	
102		Approve eligibility test file results	Client	Client	10/1/2020	10/3/2020	0%	
103		Eligibility production file						
104		Send eligibility production file	ESI	Elig Analyst	11/23/2020	12/3/2020	0%	

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105		Review eligibility production file results	ESI/Client	ESI/Client	12/3/2020	12/5/2020	0%	
106		Approve eligibility production file results	Client	Client	12/5/2020	12/7/2020	0%	
107		Load final production file	ESI	Elig Analyst	12/5/2020	12/7/2020	0%	
108		Start ongoing production eligibility updates	ESI/Client	ESI/Client	12/5/2020	12/20/2020	0%	
109		Pharmacy Network						
110		Confirm pharmacy network requirements	ESI/Client	ESI/Client	8/4/2020	8/4/2020	0%	
111		Legal Documents						
112		Provide PHI disclosure forms	ESI	IPM	8/4/2020	8/4/2020	0%	
113		Return signed PHI disclosure forms	Client	Client	8/4/2020	8/9/2020	0%	
114		Provide ERISA appeals external form	ESI	IPM	8/4/2020	8/4/2020	0%	
115		Return signed ERISA appeals external form	Client	Client	8/4/2020	8/9/2020	0%	
116		Provide Medicaid subrogation agreement	ESI	IPM	8/4/2020	8/4/2020	0%	
117		Return signed Medicaid subrogation agreement	Client	Client	8/4/2020	8/9/2020	0%	
118		File Loads: Member Data Transition						
119		File transitions call with incumbent	ESI/Client	IPM	7/31/2020	8/7/2020	0%	
120		Open Refill Transfer File (ORTF)						
121		Receive Open Refill Transfer Test File from Vendor	ESI	IPM	12/2/2020	12/7/2020	0%	
122		Load Open Refill Transfer Test File from Vendor	ESI	File Team	12/7/2020	12/12/2020	0%	
123		Receive Open Refill Production File from Vendor	ESI	IPM	1/1/2021	1/3/2021	0%	
124		Process Open Refill Production File from Vendor	ESI	File Team	1/3/2021	1/8/2021	0%	
125		Receive Open Refill Post-Production File from Vendor	Client	Vendor	1/15/2021	1/17/2021	0%	
126		Process Open Refill Post-Production File from Vendor	ESI	File Team	1/17/2021	1/22/2021	0%	
127		Prior Authorization File (PA)						
128		Receive Prior Authorization Wave 1 File from Vendor	ESI	IPM	12/2/2020	12/7/2020	0%	
129		Load Prior Authorization Wave 1 File from Vendor	ESI	File Team	12/7/2020	12/12/2020	0%	Production eligibility must be loaded
130		Receive Prior Authorization Wave 2 File from Vendor	ESI	IPM	1/16/2021	1/18/2021	0%	
131		Load Prior Authorization Wave 2 File from Vendor	ESI	File Team	1/18/2021	1/23/2021	0%	
132		Claims History File						
133		Receive Claims History Wave 1 File from Vendor	ESI	IPM	12/2/2020	12/4/2020	0%	
134		Load Claims History Wave 1 File from Vendor	ESI	File Team	12/4/2020	12/9/2020	0%	Production eligibility must be loaded
135		Receive Claims History Wave 2 File from Vendor	ESI	IPM	1/16/2021	1/18/2021	0%	
136		Load Claims History Wave 2 File from Vendor	ESI	File Team	12/12/2020	12/17/2020	0%	
137		Additional File Loads (Deductible, CAP, OOP), if applicable						
138		Receive Wave 1 of all additional production files from vendor	ESI	IPM	12/2/2020	12/7/2020	0%	
139		Load Wave 1 of all additional production files from vendor	ESI	File Team	12/7/2020	12/12/2020	0%	Production eligibility must be loaded
140		Receive Wave 2 of all additional production files from vendor	ESI	IPM	1/16/2021	1/18/2021	0%	

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141		Load Wave 2 of all additional production files from vendor	ESI	File Team	1/18/2021	1/23/2021	0%	
142		Patient Profile Transfers (PPT)					0%	
143		Confirm PPT complete	ESI	IPM	1/1/2021	1/8/2021	0%	
144		Member Communications						
145		Discuss initial communications	ESI/Client	IPM	7/5/2020	7/12/2020	0%	
146		Targeted Communications, if applicable					0%	
147		Determine member letter requirements	ESI	IPM	7/12/2020	7/19/2020	0%	
148		Define communication strategy and timing	ESI/Client	IPM & Client	7/12/2020	7/19/2020	0%	
149		Provide targeted mailings for review and approval	ESI	IPM	7/19/2020	8/18/2020	0%	
150		Approve targeted mailing	Client	Client	8/18/2020	8/25/2020	0%	
151		Mail targeted letters	ESI	Comm Fulfillment	12/2/2020	12/9/2020	0%	
152		Invoicing/Billing						
153		Review billing supplemental document	ESI/Client	IPM & Client	8/9/2020	8/9/2020	0%	
154		Send PAD/EFT form, if applicable	ESI	IPM	8/9/2020	8/9/2020	0%	
155		Return PAD/EFT form, if applicable	Client	Client	8/9/2020	8/16/2020	0%	
156		Receive first invoice	Client	Client	1/8/2021	1/15/2021	0%	
157		Customer Service						
158		Request toll free customer service number	ESI	IPM	8/9/2020	8/16/2020	0%	
159		Provide toll free customer service number	ESI	IPM	8/16/2020	8/23/2020	0%	
160		Confirm customer service phone line is active	ESI	IPM	9/26/2020	9/26/2020	0%	
161		Develop custom IVR messaging, if needed	ESI	IPM	8/16/2020	8/23/2020	0%	
162		Train customer service team, if needed	ESI	IPM	8/16/2020	8/23/2020	0%	
163		Implementation Performance Guarantees, if applicable						
164		Review implementation PGs	ESI/Client	IPM & Client	7/5/2020	7/12/2020	0%	
165		Select specific PGs	Client	Client	7/12/2020	8/2/2020	0%	
166		Present final PG outcome	ESI	IPM	1/16/2021	1/23/2021	0%	
167		Pre-Go-Live						
168		Provide Client Service Center Welcome Flyer	ESI	IPM	12/18/2020	12/18/2020	0%	
169		Review final documentation	Client	Client	12/25/2020	12/25/2020	0%	
170		Post-Go-Live						
171		Monitor claims transactions and provide daily summary	ESI	IPM	1/1/2021	1/15/2021	0%	
172		Transition to account team	ESI	IPM/AM	1/31/2021	1/31/2021	0%	
173		Post-implementation survey	Client	Client	1/31/2021	2/7/2021	0%	

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Note: This sample client Implementation timeline is for illustrative purposes only. The dates presented are considered a general guideline for a typical client Implementation, however each Implementation is unique. All required elements for an Implementation may not be shown, and there may be items listed which are not required. Once under contract, the client will receive a tailored version of this timeline.