



Sample Enrollment Timeline

The timeline below illustrates suggested steps to ensure a successful enrollment for your Voluntary plan(s). While you may add or take away steps, or change the order of some of them, the main goal should be to allow adequate time to enroll the group and submit the case prior to the plan's effective date.

Voluntary Timeline

Six weeks prior to effective date:

- Notify Assurant Employee Benefits sales office that case is sold.
- Complete paperwork.
- Request employee census.
- Schedule prospective effective date.

Four weeks prior to effective date:

- Receive personalized enrollment packets.
- Preview enrollment meeting to client's stakeholders.
- Continue efforts to notify and inform employees about the upcoming enrollment.

Three weeks prior to effective date:

- Continue efforts to notify and inform employees about upcoming enrollment meetings.
- Payroll staffers
- Posters
- E-mail
- Newsletter

Launch
Voluntary Program

Five weeks prior to effective date:

- Request personalized enrollment packets, payroll staffers and posters.
- Coordinate enrollment meetings with client and Assurant Employee Benefits sales representative.
- Create and implement employee communication plan.

Two weeks prior to effective date:

- Conduct enrollment meetings (facilitated or supported by the Assurant Employee Benefits sales representative).
- Distribute personalized enrollment packets.
- Collect completed applications and scrub for missing data.
- Submit all sold case materials to Assurant Employee Benefits sales office.