

At Ochs – We specialize in working closely with clients and their benefit advisors to develop implementation strategies that work best for them. A dedicated Implementation Coordinator from Ochs will be assigned to lead the transition process, along with a team of experts from technology; enrollment; administration; billing; underwriting and claims.

Timeline – The transition and implementation process below will be customized to meet the client’s needs.

When	Action
Date of award	Client Awards Contract for the Insurance Plan(s)
Within a week of award date	Plan and Administrative Questions Ochs Implementation Coordinator provides Coverage Administration Details (CAD) document. This document is completed by the client to ensure proper administration set up.
Within 1 – 2 week(s) of award date	Implementation Meeting (approx. 45 minutes) Ochs Implementation Coordinator initiates a conference call to discuss the plan and answer questions <ul style="list-style-type: none"> • Identify key contacts; outlining roles and responsibilities • Review sold plan design • Brief overview of billing, marketing, administration, and certificates
Following implementation call	Documents for Signature All documents are provided for review and signature
Prior to the annual enrollment period	Enrollment Materials <ul style="list-style-type: none"> • Customized marketing documents are provided (no additional cost) • Ochs provides enrollment support - email campaign, PowerPoint Presentations, in-person attendance at benefit fairs, etc.
1 – 2 month(s) prior to effective date	Certificate Documents Final electronic certificates are delivered to the client
1 month prior to effective date	Request for Census This will be used to set up billing, if list billed
1 month prior to effective date	Billing and Administration Call Prior to the first payment, the billing process will be discussed as well as a demo of the carrier website portals.
Plan Effective Date	Effective Date of the Insurance Plan(s) Plan is claim ready



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