Transition planning checklist

The move explained stage by stage — then an owner and due-date table for your team.

CHANGE, WITH A PLAN

A planning framework, not a promised timeline.

The calendar is agreed for each group; this is the sequence it follows. Each stage lists what happens and what must be settled before moving on.

1 / ASSESS THE GROUP · BEFORE A COMMITMENT

- [ ] Current renewal, benefits, enrollment, and objectives reviewed.
- [ ] Group eligibility and availability confirmed for your situation.
- [ ] The comparison and the data it needs defined — no census health data through a web form.

2 / REVIEW EMPLOYEE IMPACT · BEFORE CHOOSING

- [ ] Key physicians and facilities checked against Logro and PHCS participation.
- [ ] Prescriptions and anyone in active treatment reviewed, with a transition path where needed.
- [ ] Benefit differences — copay vs. HSA, tiers, cost share — explained in plain terms.

3 / AGREE THE TERMS · BEFORE SIGNING

- [ ] Funding, fees, plan documents, and specific/aggregate stop-loss provisions reviewed.
- [ ] Responsibilities for broker, administrator, care, and service recorded.
- [ ] Implementation capacity and an achievable effective date confirmed.

4 / PREPARE THE PEOPLE & FILES · BEFORE LAUNCH

- [ ] Enrollment, eligibility, payroll, and communication calendar set with named owners.
- [ ] Secure data exchange and accountable contacts established.
- [ ] Employee materials and member-support instructions prepared.

5 / LAUNCH & REVIEW · AFTER COVERAGE BEGINS

- [ ] Eligibility, ID materials, and first-week access questions handled.
- [ ] Open issues moved through the agreed escalation process to closure.
- [ ] Reporting, reconciliation milestones, and renewal readiness reviewed on cadence.

Transition planning checklist

Workstream owners & dates

ASSIGN THE WORK

Fill in the owner and target date for each workstream.

WORKSTREAM	WHAT IT ESTABLISHES	OWNER	TARGET DATE
Employer & HR	Eligibility, contributions, payroll, communication		
Broker / advisor	Comparison, recommendation, placement		
Administrator / service	Enrollment, ID materials, claims routing, escalation		
Care, network & pharmacy	Participation review, Rx impact, care transition		

Illustrative planning aid. Final milestones, service levels, and owners are agreed for the group; confirm specifics with your Apiary contact.