Colonial Life New Account Implementation Guide

Welcome to Colonial Life! This implementation guide outlines the key milestones that will take place as you begin to partner with us. Additionally, a Colonial Life representative will walk you through each step — from account setup and enrollment, to beginning coverage with us. Your representative will also be available to answer any questions you have along the way.

Today's Date: ______________ Account Name: ____________________________ BCN (Billing Control Number): ____________________

Keep and use this guide to capture your account number and important dates, and take any other notes as you progress.

Pre-Enrollment Steps:

- [ ] **New account paperwork** — Complete your new account paperwork with your Colonial Life representative by providing information such as billing address, account contact information, and payroll schedule details.
- [ ] **Implementation call** — If needed, you will have the opportunity to talk to a Colonial Life implementation team member to complete your account setup.
- [ ] **Enrollment logistics** — Confirm enrollment logistics with your Colonial Life representative, including dates, times, locations, and methods that work best for your business. Our benefit counselors are flexible and will be happy to meet your individual needs. You may also provide employee census information and current benefits at this time if applicable.
- [ ] **Register for My Account Administration website** —My Account Administration is our dedicated website for plan administrators to help you manage your account with us. You will receive an email with a personalized link, which you can use to register at ColonialLife.com.

DATE:	
	Enrollment Start Date: The date when your Colonial Life enrollment will begin.
	Enrollment Stop Date: The date when your Colonial Life enrollment will be complete.
	Coverage Effective Date: The first day of the month when employees' coverage will become effective.

Post-Enrollment Steps:

- [ ] **Receive and load payroll with deduction data and/or election forms** — Colonial Life will provide deduction data and/or election forms to you following enrollment. Use them to input into your payroll system to begin payroll deductions. If you require special formatting of your data return, please inform your Colonial Life representative.
- [ ] **Post-enrollment follow-up** — Your Colonial Life representative will follow up with you after enrollment to ensure all data has been delivered appropriately and address any questions about your enrollment experience.

DATE:	
	Payroll Input Date: The date when you must input deduction information and cut off payroll to meet the first deduction date.
	First Deduction Date: The first paycheck from which deductions will be taken. Confirm this date with your representative to help ensure you have sufficient time after enrollment ends to begin taking deductions.
	First Bill Date: Colonial Life will provide an invoice for your Colonial Life coverage around the last week of the month. You will receive a paper bill in the mail and an email that provides access to an online version of your bill. If you wish to move to paperless billing, please contact us via the number listed below.
	Customer Connections Follow-up: Colonial Life will contact you after your first bill generates to give you an overview of the billing process and online services available to you, and answer any questions you may have.

Colonial Life
The benefits of good hard work.®

ColonialLife.com

If you have questions, please feel free to contact us!
Colonial Life Account Contact Center: 1-800-256-7004

Your Colonial Life Representative: ________________________ Phone: __________________

Email: ____

12-16 | 101758