

SureCo's 2025 New Customer Timeline

The SureCo team has a proven process for migrating large groups to an ICHRA. We've onboarded customers from quote to completion in a few as 21 days, but every client is different. SureCo will work with you and your client to compress or extend any of these milestones as needed.

Milestones (+ Who's Involved) SureCo Consultant Client		
Phase 1 PRE-ONBOARDING (1-4 weeks)	Associated Assets 	
Consultant and client return completed SureCo census template	Census template	
Consultant reviews initial ICHRA quote with SureCo	Quote proposal	
Consultant schedules initial call with SureCo and client to review quote and see Enrollment Platform demo		
Client completes onboarding questionnaire and returns to SureCo	Onboarding questionnaire	
Contribution model and ACA affordability adjustments made as needed	Adjusted quote proposal	
Consultant and client review migration and implementation process with SureCo during onboarding discovery call	Onboarding process overview document, implementation checklist, and migration timeline	
Client, consultant, and SureCo align on Open Enrollment Period dates		
Phase 2 MIGRATION & IMPLEMENTATION (3-12 weeks)	Associated Assets 	
Client and consultant attend onboarding kickoff meeting with a SureCo migration specialist		
Client and consultant return signed SureCo contract and Business Associate Agreement (BAA)	SureCo contract and BAA	
Client and consultant log in to SureCo's shared workspace	Educational documents, implementation timelines, and action items	
Weekly onboarding meetings begin		
HRIS and/or ancillary integration scoping continues as needed		
Client and SureCo chart employee communication strategy		
Client completes HR authorized representative form for HR admin access and attends training session	HR authorized representative form	
Client reviews the company education documents from SureCo and distributes to employees		
Client verifies and submits list of eligible employees for manual census upload to Enrollment Platform	Census template	

Milestones (+ Who's Involved)



SureCo



Consultant



Client

Phase 2 | MIGRATION & IMPLEMENTATION (3-12 weeks) CONTINUED...

Associated Assets

Consultant and client approve final contribution model



Final quote proposal

Client reviews custom Enrollment Platform configuration



SureCo conducts live and recorded Enrollment Platform video training for client's employees



Client completes Stripe account setup



Client (C-Level) emails eligible employees using SureCo-provided email template



Email template

Consultant reviews ICHRA SBC and Benefit Plan Wrap Summary



[ICHRA SBC \(Summary of Benefits and Coverage\)](#)
[SPD \(Summary Plan Description\) Plan Wrap Document](#)

Client (HR Officer) emails eligible employees ICHRA Notices and ICHRA onboarding information using SureCo-provided templates



ICHRA employee notice and HR communication email templates

Client sends COBRA Notice to existing COBRA participants on group health plan



COBRA notice template

Client schedules Medicare meetings/education with Medicare-eligible employees and SureCo



Phase 3 | OPEN ENROLLMENT & BEYOND (2-6 weeks)

Associated Assets

Open Enrollment Period! Platform is open for employee benefits selection



[Enrollment Platform login](#)

Client reviews first funding report



Funding report

Employees' health coverage goes into effect; SureCo support on hand for questions



Client verifies contribution deductions for payroll are added for enrolled employees



Client and consultant participate in OEP recap meeting with SureCo



Employee benefits survey

Client and consultant attend new hire, termination, and QLE changes process training



Administration guide and new hire/termination/
QLE process document

Questions?
SureCo's large group ICHRA experts are here for you anytime.

Speak to a SureCo Expert