

# Group Enrollment Timeline



ABC Company

**Broker:** John Q. Broker

**Sales Rep:** Mr. Sales Rep, Jr.

**Enrollment Coordinator:** John Enrollment

<b>Sold Case Paperwork Due:</b> <i>Plan Designs, Sold Proposals, Completed Census, Group Application, SCIC, FUAL</i>	02/16/2020
<b>Pre-Enrollment Communications provided for distribution:</b> Email blasts, Posters, Memos, Flyers, etc	03/01/2020
<b>Booklets Provided to Employer</b>	03/05/2020
<b>Booklet Distributed to Employees</b>	03/06/2020
<b>Enroller Training</b>	02/13/2020
<b>Enrollment Period</b>	03/01/2020-03/30/2020
<b>Group Meeting Dates</b> BROKER/SUN LIFE FINANCIAL	03/01/2020
<b>Application sent in to carrier</b>	02/01/2020
<b>Enrollment Processed</b>	03/13/2020
<b>Voluntary Deduction Report Due</b>	03/24/2020
<b>Payroll Cutoff Date</b>	03/27/2020
<b>Effective Date</b>	04/01/2020
<b>1st Payroll</b>	03/30/2020

**Additional Comments:**

<b>Color Key:</b>
Sun Life Financial
Employer/Broker
Milestones

Insurance products are underwritten by Union Security Insurance Company (USIC) (Kansas City, MO) and administered by Sun Life Assurance Company of Canada (SLOC) (Wellesley Hills, MA) in all states except New York. Prepaid dental products are provided by USIC and are administered by SLOC, and are provided by prepaid dental companies affiliated with SLOC in certain states except New York. Prepaid dental companies are Denticare of Alabama, Inc., United Dental Care of Arizona, Inc., UDC Dental California, Inc., United Dental Care of Colorado, Inc., Union Security DentalCare of Georgia, Inc., United Dental Care of Missouri, Inc., Union Security DentalCare of New Jersey, Inc., United Dental Care of New Mexico, Inc., UDC Ohio, Inc., United Dental Care of Texas, Inc., and United Dental Care of Utah, Inc. In New York, insurance products and prepaid dental products are underwritten or provided by Union Security Life Insurance Company of New York (Fayetteville, NY) and administered by Sun Life and Health Insurance Company (U.S.) (Lansing, MI). Group Hospital Confinement Indemnity "Gap" or Supplemental Medical Expense "Gap" insurance is underwritten by Fidelity Security Life Insurance Company (Kansas City, MO) and is administered by SLOC.  
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