

GOING ONLINE?

A Timeline for Implementing Your Benefits Platform by the Fourth Quarter

At BerniePortal, we recommend rolling out your new benefits administration platform with your clients during open enrollment. Because most groups will renew during the fourth quarter, it is best to be completely up to speed and comfortable with your new platform by that time.

Why do we recommend implementing during open enrollment? Our sister company, benefits brokerage Bernard Health, has brought thousands of users online with BerniePortal. We have found this is the best approach, because you are implementing change at an existing time of change.

But it does take some advanced preparation to be fully implemented by Q4. Let's review:

Full implementation means you have selected a platform, contracted with the vendor, rolled out the system, attended training, and are comfortable working in the platform. You may even want to put a few of your smaller groups on the platform before the fourth quarter to establish best practices and resolve any issues. **From start to finish, we estimate this process takes around 18 weeks.**

If you plan to be online this year, we recommend you start the buying process within the next six weeks.

