

## Timeline of a Deal

This timeline applies to Comfort<sup>®</sup> and ICHRA with Gravie deals.

The time frames listed are approximate. For details on timing and the schedule of events regarding a specific deal, connect with your Gravie sales representative.



### Get a quote

*Approximate timing: 8-10 days*

- To get a quote for a group, follow the steps in Gravie's [quoting checklist](#)
- Receive the quote back from Gravie **8-10** business days
- Present the quote to your client
- If they accept, notify your Gravie sales representative to move forward



### Contracting

*Approximate timing: 7 days*

- Gravie will email the contract to your client for their electronic signature. Your client **must sign** within 7 business days or before the first day of open enrollment



### Implementation

*Approximate timing: 45 days*

- Your client will be introduced to their Gravie implementation manager and permanent account manager through a welcome email
- Your client will be asked to complete the new client questionnaire
- You or your client will confirm the contribution strategy and send the roster of eligible employees to the implementation manager
- Gravie will send your client's employees notification packets and marketing materials on their new coverage
- The account manager will hold an enrollment kickoff meeting with your client and their employees



## Open enrollment & invoicing

Approximate timing: 28 days

- Employees enroll in coverage
  - A two week window is recommended ending on or before the 15th of the month, prior to when coverage begins.
  - Enrollment may vary based on certain factors, such as the enrollment platform your client is using (Gravie or their own HRIS system), and more.
- Employees will receive ID cards within 2 weeks of enrolling. **Digital ID cards will be available the day coverage begins.**
- After open enrollment, the implementation manager will officially transition your client to their account manager who will provide year-round support, including monthly reporting, regular check-ins, important updates, and more.



## Get paid

Approximate timing: 30 days

- If this is your first deal with Gravie, complete the referral agreement provided by your Gravie sales representative.
  - Required information includes your legal name, address, TIN, a copy of your agency resident license, W9, and banking information. Upon completion of the referral agreement, a member of Gravie's commissions department will reach out requesting a copy of your agency resident license, W9, and banking information.
- You will receive commissions monthly, thirty days following the end of each plan month (e.g. you will receive January commissions at the end of February).
- A few days prior to receiving funds, you will get a commission statement via email.

### Example timeline

11/4	11/11	11/15	Early December			1/1
Notice of sale			Open Enrollment			Go live date
		New customer questionnaire completed		Network/Magellan contracts signed	Deduction file sent	ID cards mailed
All data received	Finalized quote	Proposal accepted				

