New Client Transition to Coastal TPA, Inc. - Task Timeline

COASTAL

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Week	1	2	3	4	5	6	7	8	9	10	11	12	13
Supply CTPA with Client Contact Person(s)													
Review Claim Forms with Client													
Need to reprint medical & dental claim forms													
Review eligibility options with Client													
Review enrollment forms with Client													
Review Misc forms with Client													
Review Provider Information with Client													
Review Plan Benefits with Client													
Secure new group numbers (will use same group numbers)													
Review EOB with Client													
Review Provider EOB with Client													
Provide provider database to CTPA (if applicable)													
Supply any and all reimbursment schedules to CTPA													

CTPA to determine requirements for combined ID card													
CTPA to secure open UR hospital certifications													
CTPA to review EOB remark codes w/Client													
CTPA to review Pend letters w/Client													
Client to review reporting package													
Secure camera ready artwork if applicable													
Signed Administrative Agreement between CTPA and Client													
“How To Read Your EOB” for Client to approve													
CTPA to build/load Client benefit strings													
CTPA to load provider data (if applicable)													
CTPA to load Client reimbursement schedules (if applicable)													
CTPA to develop SPD draft for Client/Consultant to review and approve													
CTPA to set up and test new banking													

(O=Order R=Receive L=Load T=Test)	Week 1	2	3	4	5	6	7	8	9	10	11	12	13
Load Key Plan & Participant Data													
CTPA to secure eligibility from Client													
CTPA to load initial eligibility													
CTPA to order initial ID cards													
CTPA to secure eligibility from EE enrollment forms													
CTPA to load updated employee eligibility													
CTPA to order ID cards based on updated eligibility													
CTPA to secure prior benefit accumulators if applicable													
CTPA to secure and load specific stop loss accumulator credits													
CTPA to secure claim histories from prior carrier and load if applicable													
CTPA to secure pended claims from prior carrier and load if applicable													
CTPA to secure open stop loss filings from prior carrier and load if applicable													
CTPA to secure and load open subrogation claims													
CTPA to secure open UR cases and load													

(D=Draft C=Changes SO=Sign Off P=Print DR=Distribute)

Employee Packets													
• SPD													
• ID cards													
• Customer Service Contact Sheet													
• Network Provider Information													
• How To Read Your EOB													
• How To Respond to a Pend Letter													
Client to prepare EE handout packages													
Client to distribute EE handout packages													
Meet with Client for final wrap-up													

Week	1	2	3	4	5	6	7	8	9	10	11	12	13
First Bill To Client													
Identify all vendor services to bill for and distribute to													
Generate first billing for Client													
Verify vendor rates and eligibility are correct													

(O=Ordered R=Received L=Loaded T=Tested

Claims Adjudication On-Line													
• Benefits loaded													
• Provider contracts loaded													
• Eligibility loaded													
• Claim histories loaded													
• Accumulators loaded													