

BPP Replacement: Transition to New Unum Plans

(Effective January 1, 2009)

Key Implementation Activities

	August	September	October	November
Adoption Agreement & Enrollments		Adoption Agreement Period = 9/1 – 9/15 (Plan Sponsors submit completed adoption agreements to General Board) Employee Data Cleanup Period (Plan Sponsor updates demographic information for applicable Employees on GBOPHB system, based on “employee listing” received from General Board)		Lay LTD/Life & Clergy Supplemental Life Plans Conversion/ Enrollment Period (Week of 11/3) <ul style="list-style-type: none"> Auto-conversion or enrollment of eligible participants No enrollment forms necessary Plan sponsor makes changes to initially converted/ enrolled group
Communications – Plan Sponsor	Final Adoption Agreement Kit to Plan Sponsor (regular mail and OnBoard Express) Plan Sponsor Conference Calls: 8/26 & 8/27 (OnBoard Express w/ Supporting Documents)	Adoption Agreement confirmation & approval (from GBOPHB) Separate from the Kit, will also provide each plan sponsor with “employee listing” from GBOPHB system to facilitate data clean-up (if applicable) Plan Sponsor Conference Calls: 9/30 & 10/1 (OnBoard Express w/ Supporting Documents)	Adoption Agreement confirmation & approval (from GBOPHB) Sample Communication Pieces for Plan Sponsor Use in Communicating to Participant’s (e.g. PowerPoint slides to accompany plan highlight sheets from AA kits)	<i>Early November (Week of 11/3):</i> <ul style="list-style-type: none"> Plan Sponsor Participant Eligibility Listing (Eligible’s & Ineligible’s – from Ceridian through General Board) <i>Mid to Late November (Week of 11/10 – Week of 11/24):</i> <ul style="list-style-type: none"> Plan Sponsor Confirmation of Plan Elections & Enrollments (On-line via CAMPUS)
Communications – Participant			October <i>Lay LTD/Life & Clergy Supplemental Life Participant:</i> From Plan Sponsor (at plan sponsor discretion) - if deemed necessary, “Heads-Up” regarding new Unum Plans, expectations, will be receiving communication directly from Unum, etc.	
Communications – BPP Claimants			<i>Existing BPP Claimant:</i> From General Board - Overview of impact (or no impact) of transition to new Unum plans – e.g. LTD benefit payments will continue, life coverage still in place, etc.	
Other			End of October: Webex Demo/ Conference Call: CAMPUS Overview (for Plan Sponsor)	If necessary, Webex Demo/ Conference Call: CAMPUS Overview follow-up (for Plan Sponsor)

BPP Replacement: Transition to New Unum Plans

Key Implementation Activities

	December	January/ February '09	March /April
Adoption Agreement & Enrollments		Lay LTD/Life & Clergy Supplemental Life Plans <ul style="list-style-type: none"> Policy(ies) Effective Date: January 1 Optional Life Plan <ul style="list-style-type: none"> Enrollment Period (for eligible participants) (January 15 – February 28) 	Optional Life Plan <ul style="list-style-type: none"> Policy Effective Date: April 1
Communications – Plan Sponsor	Plan Sponsor Invoice for 1 st Quarter: distributed by mid-December (from Unum)		Plan Sponsor Invoice for 2 nd Quarter: distributed by early-mid March ; from Unum (for Lay LTD/Life & Clergy Supplemental Plans)
	December	January/ February '09	March/April
Communications – Participant	<i>Lay LTD/Life & Clergy Supplemental Life Participant:</i> From Plan Sponsor (at plan sponsor discretion) - if deemed necessary , follow-up regarding new Unum Plans, expectations, will be receiving communication directly from Unum, etc. <i>CPP Participant:</i> From General Board - Optional Life Plan Overview & Upcoming Enrollment Opportunity through Unum	<i>Lay LTD/Life & Clergy Supplemental Life Participant:</i> From Unum (directly to participant) - Confirmation of new plan coverage (incl. online access to policy/certificate) + <i>Optional Life Plan Enrollment Packet for Lay life enrollees</i> <i>CPP Participant:</i> From Unum (directly to participant) - Optional Life Plan Enrollment Packet	<i>Optional Life Participants:</i> Confirmation of purchased Optional Life coverage (incl. online access to policy/certificate) with 4/1/08 policy effective date Initial quarterly premium bill distributed from Unum directly to Optional Life participant
Communications – BPP Claimant	<i>Existing BPP Claimant:</i> From General Board - if necessary, final follow-up overview of transition expectations - how not impacted by transition to new Unum plans		
Other			