



# New Group Onboarding Checklist

## Preparing For Enrollment

### 1 Affiliate Submits Client Overview

### 2 Client Signs List Bill Agreement

Sedera will send a List Bill Agreement that must be signed by the Client

### 3 Client Completes Dwolla Account and ACH Set Up

It is highly recommended to cross the start line no later than the 1st of the prior month to allow enough time for prospective members to enroll.

## Enrollment

### 1 Client Receives Enrollment Page Link

Link will not be sent any earlier than 1 month prior to start date

### 2 Members Enroll by the 20th

Members enroll from the 1st - 20th

### 3 Client Reviews Draft List Bill & Submits Corrections

Client received the draft List Bill on the 21st and submits corrections by noon on the last business day of the month

### 4 Final List Bill Sent on the 1st

Enrollment Window: 1st-20th