



Sample Implementation Schedule for Start-up Plan

Action Item	Owner	Due	Complete	Notes
New Account Paperwork	BPAS	1/1		Completed PPF, Attachment A, SFP
Set Date for Plan Design Call	BPAS	1/8		
Discuss Payroll Setup with Provider	Plan Sponsor	1/8		
Funds Approved	BPAS	1/9		
Plan Design Call	BPAS	1/9		
Internal BPAS PHM held	BPAS	1/10		
Signed Highlights	Plan Sponsor	1/10		
EBN Link (kits ordered if applicable)	BPAS	1/22		
CensusPro Training	BPAS	1/24		
Enrollment Kits Arrive	BPAS	2/5		Earliest date to schedule education meetings
Service Agreement and Plan Document Completed	BPAS	2/12		
New Enrollment Forms Completed	Plan Sponsor	2/15		Deferral election changes processed thru payroll, forms sent to BPAS. IMPORTANT NOTE: Any participant who does not return a completed enrollment form by this date will have money invested in the default investment option.
Document and Agreements Returned	Plan Sponsor	2/15		
Effective Date of Plan	BPAS	2/16		
First Contribution to BPAS	Plan Sponsor	2/26		
Plan is Live	BPAS	2/27		PIN letters sent to participants
Web Demo	BPAS	2/27		
BPAS Issues First Statement	BPAS	3/31		
BPAS Does First 5500 Filing for PYE	BPAS	3/31		