PIOPAC Fidelity

Organization Transition Process

The Organization

The organization communicates with their affected population and provides a census to PIOPAC.*

The organization sends follow-up to their population reminding them to look for message from PIOPAC.*

PIOPAC uploads census and initiates communication to each participant with unique link to secure their payment method.
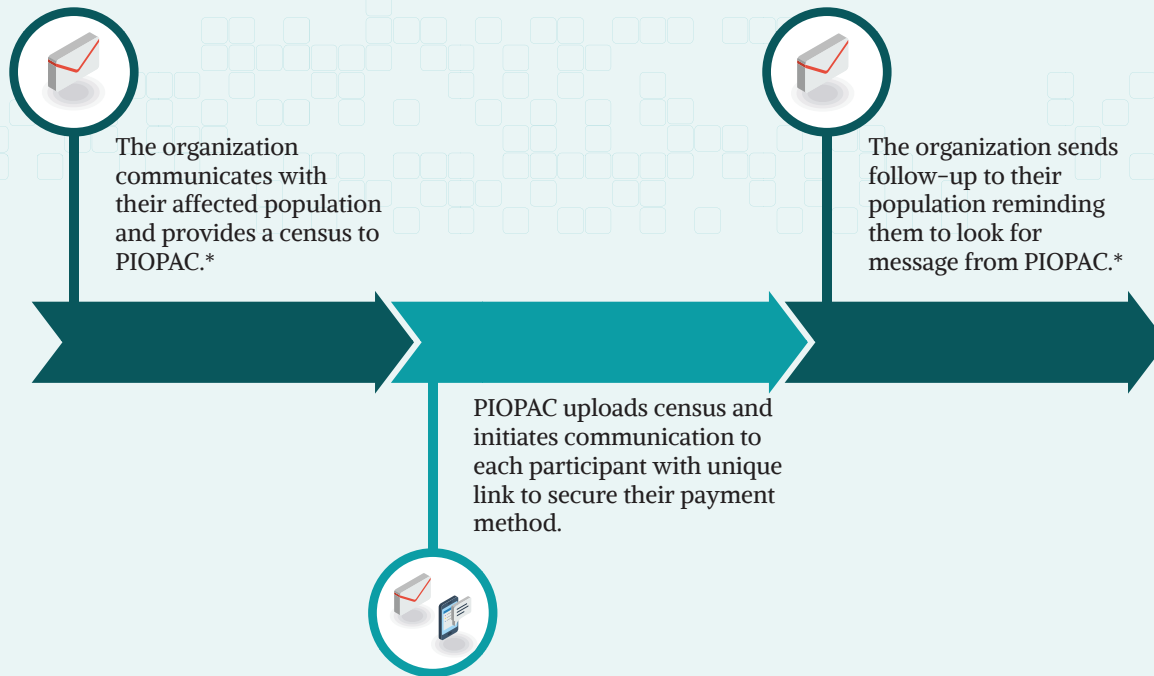
PIOPAC

Payment method received

When payment method is provided by the participant, no further action is needed.

PIOPAC initiates a welcome letter to participant

Payment method not received

PIOPAC sends final notification 6 days prior to the draft date indicating the need to act to keep their coverage.

Records with no payment method added are removed from the active system. No further outreach will go to those participants.

* PIOPAC can provide templates for organizational communications.

www.piopac.com 1-888-533-0555 inquiry@piopacco.com

PIOPAC Fidelity

Organization Transition Process

1 Communication

The organization communicates with their affected population. This communication includes the reasoning, the PIOPAC solution, and the timeline.

It also informs each participant to expect an email and/or text message from PIOPAC providing a unique link for each participant to take the steps needed to keep their coverage.

2 Census

The organization provides PIOPAC with census information including participant identifier (social or eeid etc.), participant name, carrier + policy type, premium for each policy, email, and cell phone.

Note – the premium must align with the drafting frequency to fully pay policies each month.

3 Outreach

PIOPAC uploads census information and initiates a text message and/or email to every participant in the census.

This message invites the participant to follow the unique link sent to them to learn about PIOPAC and secure their payment method.

4 Follow Up

PIOPAC notifies the organization and broker that emails and/or text messages have been issued to the population.

The organization then follows up with their affected population regarding the email and/or text message from PIOPAC and the actions needed for the participant to keep their coverage.

5 Landing Page

The link brings participants to their unique and secure landing page containing the steps needed to keep their coverage as well as general information regarding PIOPAC's role and services.

PIOPAC can provide a default message for the landing page, or work with the organization to customize and/or co-brand a message.

6 Payment Page

Clicking through the landing page takes the participant to a unique payment page pre-populated with their name and premium amount.

After validating the information and adding their preferred payment method, the participant is finished.

PIOPAC initiates a welcome letter to the participant.

7 Final Reminder

If payment method has not been received 6 days prior to the draft date, PIOPAC sends one final text and/or email notification to remind the participant of the need to act in order to keep their coverage.

This time frame allows the participant to add their payment method ahead of the scheduled draft while allowing for weekends or holidays.

8 Records Purge

Upon draft date, participants that have not taken action to provide their payment methods will be inactivated in the system.

PIOPAC will no longer send communications unless asked to do so by the participant.

Reports will be available to the broker identifying participants that provided updated payment information.