

On-site Checklist



Pre-Enrollment Travel Booking

Once you gain expenses, book ASAP!
Travel booked after one week may effect pricing,
which will be compensated by the counselor

1



Pre-Enrollment Case Readiness

Review BOD and verify ben admin credentials
Reach out to HR to introduce yourself
Verify instructions to get to the on-site location

2



On-site Start of Day

Be ready at least 15 minutes before on-site
start time and slack group channel to let us
know you are set up and ready for the day

3



On-site Support and Breaks

Educate and Enroll Employees
Take lunch based on HR's advised time
You have two 15-minute breaks

4



End of Day

Complete the on-site dispositions form
Do not pack up until the on-site requested
hours are over. Verify EOD with Charlotte.

5



End of On-site Travel

Keep travel expense receipts for your own tax
purposes

6

