Reta Lifecycle Calendar At-a-Glance

JAN

- New Enhancements and Programs Announced **starts January 1st**
- Loss/Ratio Reports Sent **starts January 1st**
- Quarterly Check-in Calls **to be scheduled quarterly**
- Summary Annual Report (SAR) **starts January 1st**
- Wellness Health Risk Performance **starts January 1st**
- OE Planning Calls Scheduled **starts January 15th**
- Renewal Meeting Scheduled **starts January 15th**
- Q1 Wellness Challenge

FEB

- Annual Trustor Survey **February 1st–February 28th**
- Final Renewal Materials **February 1st–February 15th**
- Loss/Ratio Reports Sent
- Final Renewal Meeting **starts February 7th**
- OE Planning Calls Conducted **starts February 15th**
- Post OE Planning Follow-up **starts February 15th**
- Trustor Decision Meetings **start February 15th**
- Renewal Meeting Scheduled **ends February 21st**

MAR

- Final Renewal Meeting **ends March 1st**
- Loss/Ratio Reports Sent
- Trustor Decision Meetings **end March 15th**
- New Plan Year Programs Announced **ends March 31st**
- Wellness Health Risk Performance Sent **ends March 31st**
- Wellness Grant Applications Due **March 31st**
- Q1 Grant Balance Report Sent

APR

- Final Trustor Renewal Decision **ends April 1st**
- Loss/Ratio Reports Sent
- OE Tools Prepared **starts April 1st**
- OE Planning Calls Conducted **ends April 15th**
- OE Training Tuesdays **start April 15th**
- RBC Ready for Trustors to Review **starts April 15th**
- Summary of Benefits and Coverage (SBC) **starts April 15th**
- Open Enrollment **starts April 21st**
- Q2 Wellness Challenge

MAY

- Annual Trustor Meeting Save-the-Date Notice Sent
- Loss/Ratio Reports Sent

JUN

- Loss/Ratio Reports Sent
- Open Enrollment **ends June 1st**
- Post OE Change Report **starts June 2nd**
- New ID Cards Issued **starts June 15th**
- OE Training Tuesdays **end June 30th**
- New Trustor Bill Sent **June 21st–June 24th**
- Q2 Grant Balance Report Sent

JUL

- Loss/Ratio Reports Sent
- New ID Cards Issued **ends July 1st**
- Post OE Change Report **ends July 1st**
- Q3 Wellness Challenge

AUG

- Annual Trustor Meeting Invitation Sent **August 1st–August 15th**
- Annual Trustor Meeting Registration **starts August 1st**
- Loss/Ratio Reports Sent
- Post OE Report Sent **starts August 1st**

SEP

- Summary Plan Description (SPD) Finalized **starts September1st**
- Loss/Ratio Reports Sent
- Annual Trustor Meeting Registration Due **ends September 20th**
- Q3 Grant Balance Report Sent

OCT

- Annual Pharmacy Updates Announced **starts October 1st**
- Annual Pharmacy Impact Reports Delivered **starts October 1st**
- Certificate of Creditable Rx Coverage **October 1st–October 15th**
- Compliance Checklist **starts October 1st**
- Loss/Ratio Reports Sent
- Post OE Report Sent **ends October 1st**
- Summary Plan Description (SPD) **ends October 1st**
- Wellness Program Changes Announced **starts October 1st**
- Annual Trustor Meeting Held **October 15th– October 22nd**
- Renewal/Trend Preview **October 15th– October 31st**
- Wellness Grant Applications **starts October 15th**
- Q4 Wellness Challenge

NOV

- EnvisionRx Member Notifications Sent **starts November 1st**
- Loss/Ratio Reports Sent
- Pre-Renewal Meetings Scheduled **starts November 1st**
- Pre-Renewal Materials **starts November 5th**
- Pre-Renewal Meeting **starts November 10th**
- Annual Pharmacy Updates **end November 15th**

DEC

- Reta Team Pre-Renewal Follow-up **December 1st–January 31st**
- Compliance Checklist **ends December 31st**
- EnvisionRx Member Notifications Sent **ends December 31st**
- Loss/Ratio Reports Sent **ends December 31st**
- Wellness Program Changes **end December 31st**
- Q4 Grant Balance Report Sent

Reta
A Catholic Healthcare Trust