Phase/Action	Status	Start date	End date	Duration								April										Ма	У	
	Status	Start date	End date	Duration	08	09	10	13	14 15	16	17	20	21	22	23	24	27	28	29	30	01	04	05	06
☐ Basic Concepts						Bas																		
Types of plans (Trip Protection, Travel Med)	Unstarted		04/09/2020	1d		Тур																		
Annual Plans	Unstarted		04/09/2020	1d		Ann																		
	Unstarted		04/09/2020	1d		Gro																		
Types of Coverage (CFAR, FAP)	Unstarted		04/09/2020	1d		Тур																		
Mura vs Legacy Site (+ transition points between Mura and Legac			04/09/2020	1d		Mur																		
Other Ancillary sites (ExpatHC, TIA, etc)	Unstarted		04/09/2020	1d		Oth																		
☐ ► Plan Quoting Administration							Plan																	
Overview of moving parts (cm_quote -> Quote component -> Quote compon				2d				view c																
Plan Domain orientation session hosted by Michael (Michael/				2d				Doma																
Current process for backing up/updating XML forms	Unstarted	04/10/2020		2d			Curre																	
Updating Java objects (frequent types of tasks, gotchas)	Unstarted	04/10/2020		2d			Upda	1																
Updating Rates (workflow by carrier, examples)	Unstarted	04/10/2020	04/13/2020	2d			Opua	lung F																
Quote/Enrollment Workflow								•	Quote/Enrc  Quote -> R															
Quote -> Register -> Purchase -> Fulfillment workflow walkthroug				2d					State-spec															
State-specific plans - what are they and how are they managed				2d					Private-lab															
Private-labelled plans / Plans we collect premiums for	Unstarted	04/14/2020		2d					documenta															
documentation on plan-specific logic/business rules	Unstarted	04/14/2020		2d					Group Quo															
<ul><li>✓ Group Quote Request</li><li>□ Policy Picker</li></ul>	Unstarted	04/14/2020	04/15/2020	2d					STOUP QUU	Policy	v Diele													
Policy Picker  What is it and how does it work	Unotode	04/16/0000	04/17/0000	04						What														
What is it and how does it work  Policy Picker - how are benefits administered	Unstarted	04/16/2020		2d						Policy														
	Unstarted	04/16/2020		2d						Policy														
Policy Picker - how are plan warnings administered	Unstarted	04/16/2020	04/17/2020	2d						. 5110	, . 1011	Mych												
	Unatarted		04/00/0000	4 .d							•	MyF												
MyPolicies section walkthrough	Unstarted		04/20/2020	1d								Rer												
Renew purchase  Affilitate Management	Unstarted		04/20/2020	1d								1101	Λffil											
☐ Affilitate Management	Unatarted		04/01/0000	4 .d								•	Affil											
Setting up a new affiliate (+ invite process)	Unstarted Unstarted		04/21/2020	1d 1d									Sett											
Tracking affiliate production (+ Sub affiliate)			04/21/2020	1d									Trac											
Affiliate tech support?	Unstarted Unstarted		04/21/2020	1d									Affil											
Affiliate Schedules			04/21/2020										Affil											
☐ Carrier/Product Update Process	Unstarted		04/21/2020	1d									7	Carrie	er/Prodi	uct Hi								
Select Quote/Purchase API	Unctarted	04/22/2020	04/24/2020	24									•	Selec										
PayPal Integration	Unstarted	04/22/2020		3d 3d										PayPa										
Obtain rates	Unstarted Unstarted	04/22/2020		3d											n rates	===								
Obtain API documentation	Unstarted	04/22/2020		3d										Obtair		-								
Obtain Plan/Coverage Details		04/22/2020		3d										Obtair										
Document Carrier Contact Information	Unstarted	04/22/2020		3d										Docur										
Carrier Relationship Communication Plan	Unstarted Unstarted	04/22/2020		3d										Carrie										
Verify Carrier API via external tool (postman, etc)	Unstarted	04/22/2020		3d										Verify		-								
Format and import Carrier Rates	Unstarted	04/22/2020		3d										Forma		===								
Testing DEV	Unstarted	04/22/2020		3d										Testin		-								
Testing Beta  Testing Beta	Unstarted	04/22/2020		3d										Testin										
Go Live Process				3d										Go Liv										
Carrier Testing /Approval Process	Unstarted Unstarted	04/22/2020		3d 3d										Carrie			į							
Troubleshooting issues with the carriers		04/22/2020		3d										Troub		===								
handling reported errors/troubleshooting reported issues		04/22/2020		3d										handl		-								
Other	onotantoa	0 17 227 2020	0 1/2 1/2020	00													Otl	her						
Other TIC Administration Tasks	Unstarted	04/27/2020	04/28/2020	2d													Othe	r TIC /						
BoldChat - still in use?		04/27/2020		2d													Bold	Chat -						
Support for TravelInsuranceIsrael	Unstarted	04/27/2020		2d													Supp	ort for						
Google analytics administration - Creative owns?	Unstarted	04/27/2020		2d													Goog	gle an:						
Recommendation Tool	Unstarted	04/27/2020		2d														mmeı						
Ø payeezy	Unstarted	04/27/2020		2d											0		paye							
□ ► Misc	_ 13.100	0_0	020																Misc					
All supporting documentation has been saved	Unstarted		04/29/2020	1d														•	All s					
Discuss concerns/questions	Unstarted		04/29/2020	1d														•	Disc					
☐ ► Live Product Implementations				-																Live				
	Unstarted		04/30/2020	1d															•	TII				
✓ Travelex	Unstarted		04/30/2020	1d																Trav				
☐ ► Additional Sessions hosted by Michael (Michael/Jason/Mike)				-																	Additi	ional Se	ssio	
Affiliate Commission Tracking and Payments	Unstarted	05/01/2020	05/05/2020	3d																•	T	ite Comn		
Re-Posting Failed Policies	Unstarted	05/01/2020		3d																	Re-Po	osting Fa	ailed	
Call Center Sales Tracking	Unstarted	05/01/2020		3d																		Center S		
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