Transition readiness checklist

Every organization communicates a little differently. This checklist is here to help your team use the transition toolkit in the way that works best for you.

Helpful steps to consider

Get familiar

- ☐ Review transition toolkit materials
- ☐ Identify the best internal HR or benefits lead
- ☐ Align on employee communication timing

Plan communications

- ☐ Send the employee announcement email June 1
- ☐ Share follow-up communications on June 15
- ☐ Share a final reminder communication on June 30
- ☐ Make the employee FAQ available to internal teams

Prepare for questions

- ☐ Review the employee FAQ and portal registration guidance
- ☐ Share key messages with HR, benefits, managers, or help desk teams
- ☐ Confirm where employees should go for support

Before July 1

- ☐ Confirm communications are ready
- ☐ Ensure support contacts are accessible to employees
- ☐ Remind teams that this is a name change, not a change to employees' prescription coverage, medications, pharmacy access, or support