

Implementation Guide



READY SET GO!

You are just three steps away from program implementation.

STEP 1: PICK IT

Select the benefit package(s) that make the most sense for your employees. You can choose to pay for the program for your employees or make it available through payroll deduction. We recommend providing the program at no cost to your employees, as they will be more likely to utilize the benefits. We'll provide you with the corresponding documentation and forms to get started.

STEP 2: SIGN IT

Complete and sign an Employer List Bill Agreement reflecting your package selection and billing information. You should then email the signed agreement to the Account Executive (AE) listed on the form and the setup process begins! Please note the Billing Contact will receive your statement at the end of each month.

If you elect to offer these benefits as employee paid, voluntary programs, you will also need to either have a payroll deduction form completed by each employee (don't worry... we can help with that), or integrate these approvals into your existing voluntary election methods.

STEP 3: ACTIVATE IT

As the group is going through internal setup, a New Benefits Account Coordinator will email the Billing Contact listed on the List Bill Agreement to verify his/her email address and reinforce key points of the contract. Send your AE an eligibility file for all eligible employees (we'll show you how). Eligibility files must include employees' first and last name, address, a unique ID and email address. You will also use this same file format to submit Adds and Terminations.

BILLING

Very important! This part can be confusing... New Benefits bills in arrears. You are invoiced for all employees active the last business day of the month. The invoice is emailed to the billing contact provided on your List Bill Agreement within three to four business days of the 1st of the month. Payment is due by the 20th day of each month. We accept payment via check, credit card or bank draft. Recurring monthly payments are available and we can automatically charge a credit card or bank account for the list bill total. If payment is not received by the 20th of the month, we will send a payment reminder email but don't let your group be deactivated for non-payment! The deactivation and reactivation process can impact an employee's access to a benefit when they need it.

RESOURCES

