

Tips & Tools for Successful Implementation





Implementation

www.choicecarecard.com

BROKER IMPLEMENTATION TOOLS

- Enrollment Forms
- Welcome Kits
- Submit New Group

Submit New Group –

1. Submit New Group Submission Form (NGSF) Online
2. Print NGSF and email, fax or mail



Implementation – Submitting Online

1. Enter group name and click “Create Group”
2. Always password protect your group!
3. Complete necessary fields
4. Read and Check Employer Acknowledgement
5. “Save Data” and/or “Submit Completed Form”
6. If there are required fields missing, they will be highlighted in red after submitting completed form
 - You can go back at that time to edit or you may submit the form as is



Implementation – Submitting Online

7. You will receive an email confirmation that your NGSF has been received
8. The other required Choice Care Card forms that must be submitted to begin implementation are:
 - Employer Signature Page,
 - ACH Authorization Form
 - Broker Commission Structure
 - Health Plan Design/Summary of Benefits
9. After receipt of NGSF a confirmation email will be sent to you and the client (if email addresses are provided for both) from the installation department.
 - This email includes pertinent plan information and notifies you if anything is missing.
 - Approval of this email is required to continue implementation.



Implementation – Enrollment Material

Enrollment material can be provided 3 ways:

1. Enrollment materials are located under the broker tab of the website. This is useful if the enrollment meetings will be completed prior to Choice Care receiving the NGSF.
2. If enrollments are not received with NGSF, they will be shipped to the client within 2 business days after the confirmation email has been approved by client or broker.
3. Electronic enrollment is also available, please contact the installation department for the enrollment template.
 - It is recommended by the Choice Care Card that all participating employees complete an enrollment form to protect the employer.



Implementation – Enrollment Process

1. Cards will be issued 2-3 business days after receipt of completed NGSF, ACH, approved confirmation email & enrollment forms.
2. After enrollments have been processed, an email will be sent to the client and the broker stating that cards have been issued. Cards will arrive at employees' homes within 7-10 business days.
3. Welcome kits will be mailed or emailed to the employees about 30 days after enrollment.
4. If the client has elected to participate in the Choice Care Card substantiation service, HIPAA forms with instructions will be emailed/mailed to employees within 35-40 business days after cards have been issued.



Implementation – Administrative Materials

The following administrative materials will be sent to the client via email 5-10 business days after the date the cards are issued:

- Client Agreement
- Plan Document*
- SPD*
- Adoption Agreement*
- Consent Form*
- Non-discrimination testing worksheet
- Funding Sheet

*HRA/FSA/POP will be sent as separate documents



Implementation – Welcome

The client receives a welcome email from their dedicated client service representative 3-5 business days after the plan administration email is sent.

This email includes the following:

- Contact information for client & enrollees
- Web tour invitation & schedule
- Administrative password
- Reporting system login information

This email is followed up with a phone call to the client.



Eligibility

- After open enrollment all enrollments, terminations, status changes and address changes are sent directly to the eligibility department via our online enrollment system.
- This is located under the Employer tab of the website. Clients will need their administrative password to access this portion of the website.
- Welcome packets for new hires are shipped directly to the enrollees' homes.
- If the client is participating in the Choice Care Card substantiation service, a HIPAA form with instructions will be sent via email/mail to the new enrollee.



Renewal

1. Choice Care sends notification of renewal to client and broker 45 days prior to renewal date. This notification will include:
 - Details of plan
 - Enrollment material
2. Choice Care Card plans renew automatically
3. Notify Choice Care of the following:
 - Plan changes (funding, eligible expenses etc.)
 - Changes in HRA enrollment
 - Changes in health plan
4. FSA/DCA participants must complete new enrollment forms
5. Client and broker will receive a list of participants and funding amounts once the renewal is complete.



Employee Education

There are many educational tools available under the Members tab of the website

- Educational videos are available in English & Spanish.
- Descriptions of the different plans
- FAQ's

Employee webinars are also offered

- These webinars are plan specific and flexible to the needs of the client.