

# Implementation Checklist



Item	Specifics	File Format	Lead
Plan Documents	<ol style="list-style-type: none"><li>1. Schedule of Benefits/ Summary of Plan Descriptions</li><li>2. Summary of Benefits and Coverage</li><li>3. Formularies (including HSA/ACA preventative drug list, if applicable)</li><li>4. Dental and/or Vision plan documents, if applicable</li></ol>	Standard PDF	Consiliarium Group
Benefit Guide	Employee Benefit Guide for the plan year	Standard PDF	Consiliarium Group
Contribution Strategy	<ol style="list-style-type: none"><li>1. Gross Premiums</li><li>2. EE/ER payroll deductions for medical and dental/vision</li><li>3. HSA/HRA/FSA contribution details</li></ol>	Excel Preferred Standard PDF Accepted	Consiliarium Group
Eligibility File	Template is filled out with necessary fields <i>Instructions provided in template</i>	Please use <a href="#">this template</a>	Employer

This is a basic list of documents we will need for your implementation! We will discuss a full list of needed items during your implementation call, but do not hesitate to reach out with any questions.