



Implementation Checklist

Item	Specifics	File Format	Lead
Plan Documents	<ol style="list-style-type: none"> 1. Schedule of Benefits 2. Prescription Drug Coverage Form 3. Rate Contract 	Standard PDF	HPHC/THP Account Executive
Dental and/or Vision Plan Summaries	Dental and Vision Plan Summaries for the plan year, if applicable	Standard PDF	Broker
Benefit Guide	Employee Benefit Guide for the plan year	Standard PDF	Broker
Contribution Strategy	<ol style="list-style-type: none"> 1. Gross Premiums 2. EE/ER payroll deductions for medical and dental/vision 3. HSA/HRA/FSA contribution details 	Excel Preferred Standard PDF Accepted	Broker
Eligibility File	Template is filled out with necessary fields, including Subscriber IDs if participating in Claims Snapshots <i>Instructions provided in template</i>	Please use this template	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.