

Implementation Checklist



Item	Specifics	File Format	Lead
Plan Documents	1. Schedule of Benefits/ Summary of Plan Descriptions 2. Summary of Benefits and Coverage 3. Formularies (including HSA/ACA preventative drug list, if applicable) 4. Dental and/or Vision plan documents, if applicable	Standard PDF	Broker
Benefit Guide	Employee Benefit Guide for the plan year	Standard PDF	Broker
Contribution Strategy	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 <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.