



# Welcome to Promise Health Plan:

## What's Next?

**Thank you for choosing Promise Health Plan. We're excited and honored to continue our relationship and begin the implementation process.**

Our implementation process takes anywhere from 4–8 weeks before the effective date of the benefit plan. From beginning to end, every step of the way, you will have a dedicated Promise Health Plan team working with you to build and implement the plan. That team includes:

- Implementation Manager
- Client Manager
- Employee Service Representative
- Billing Analyst
- Plan Document Analyst
- Business Analyst
- Cobra/FSA/HSA Analyst (if applicable)

Your **Implementation Manager** will be the point person for the entire implementation process.

Your **Client Manager** will oversee the implementation process, and once the plan is live, will be your go-to person for benefit management, design, product or plan recommendations, and reporting for the plan.

Throughout implementation, we'll provide an active agenda to track where we are in the process. We'll continuously track all details and deadlines so we adhere to our implementation timeline.

**No surprises: that's our implementation motto.** We're dedicated to keeping all stakeholders informed and engaged for a smooth transition so that members are ready for their new benefit plan year.

## Your Promise Health Plan Contacts

### Implementation Manager:

Name:

Email:

Phone:

### Client Manager:

Name:

Email:

Phone:



# Here's a quick overview of the implementation process:



## Broker Kick-Off Meeting

- Review the products and services sold and final fees
- Request required implementation documents:
  - Prior carrier SPD, SBC, ID Card
  - Client logo
  - Benefit plan changes
  - Completed Prep Checklist



## Weekly Client Implementation Meetings

- Work step-by-step through plan set-up while determining administrative and plan details
- Finalize plan design, billing, reporting, marketing communications, plan documents, financial agreements



## "Go Live" Summary

Right before the effective date, you will receive a "GO LIVE" summary email of key information to prepare you for your effective date and any member questions associated with moving to a new carrier. This summary will include:

- ID card listing
- Key member communications
- Contact list



## Debrief Meeting

The final step of Implementation is the debrief meeting, which occurs about one month following the effective date. The purpose of this meeting is to address any issues with members or administration that may have arisen since the effective date. More specifically, it is for a deeper dive into the specific details and advantages of Promise Health Plan's value-added programs and to share recommendations on communication plans and reporting details.

**We're looking forward to working with you!**  
**And once again, thank you for trusting us with your health benefit plan.**

