How to successfully submit a New Group

Step 1: Complete the Master Application

The Choice Strategies Master Application is completed by the Employer with help from their Broker (if applicable). This document captures all of the necessary information about the client and the desired plan, such as:

- Company and Administrator Contact details
- Eligibility information for Participants
- Plans to be offered
- Funding amounts
- Eligible expenses

If you have any questions while filling out the application, please contact your Choice Strategies Sales Representative directly, email sales@choice-strategies.com or call 1-888-278-2555 #6.

Step 2: Confirm ACH Authorization has been provided (for Payment of Admin Fees and Claims)

The ACH Authorization form is included at the end of the Master Application, but it is also available as a stand-alone form. The Employer must include:

- Employer's bank account number and routing number
- Authorization to automatically debit the provided bank account for:
  - Choice Strategies Administration Fees (Monthly – Invoice Provided)
  - Employee Debit Card Transactions (if applicable)
  - Employee Claim Reimbursements

The Employer is free to use any bank they wish, and can set up and manage the account however they see fit. We do recommend that the account have overdraft protection to avoid insufficient funds fees. Many of our clients choose to use a separate bank account rather than a general operating account due to the possibility of incurring a large number of transactions.

For more information on how Choice Strategies' paperless billing works, please see our Billing Resource or contact your Choice Strategies Sales Representative.

Step 3: Compile Employee Enrollment and Eligibility Information

In order to set up individual accounts for participating Employees, Choice Strategies needs Employee demographic and eligibility information as well as any participating dependents' information. New groups should submit enrollment information to Choice Strategies via our Enrollment Template. For convenience we also offer individual Employee Enrollment Forms that can be distributed to Employees to help the Employer collect all relevant information needed to complete the template.

Step 4: Provide a Copy of the Health Plan Summary of Benefits, if applicable

While the Master Application requests basic health plan design information, a copy of the health plan schedule of benefits can help our service teams provide over-the-top service to our clients and members. While this is not required, it is highly recommended that clients submit their health plan SOB.

Step 5: Submit all Implementation documents via one of the following methods:

- **Fax : 1-888-415-6471**
- **Mail : Choice Strategies**
  P.O. Box 2205
  South Burlington VT 05407