

Choice Strategies New-Client Implementation

Choice Strategies processes all new Employer Master Applications and enrollments in the order in which they are received. Once your submission is under way, you will receive a series of emails from Choice Strategies (see list below) keeping you abreast of the implementation process.

1. The **Implementation Department** sends an email confirming receipt of the application within two business days of receiving it. This email may also include a list of any additional information or documents that will need to be provided to Choice Strategies so we can successfully set up the account and plan(s) in our system and create the plan documents.
2. The **Client Services Team** sends a confirmation email when the plans have been set up in our system. This email will also include the following:
 - Funding Sheet (Benefit Summary)
 - Contact information for your Client Service Team
 - A review of online resources such as the Employer Administrative Guide (where plan documents and invoices are stored), On-Demand Reporting System and links to video tutorials and educational information.

Upon request, the Client Services Team will securely send the Employer contact(s) their login information for administrative access to the Admin Guide and Reporting System.

- Confirmation regarding employee enrollments if they have been received and processed. Choice Strategies cards (if applicable) will arrive at employee homes within 7-10 business days from that point
3. The **Implementation Department** sends an email containing the Client Contract for eSignature. Once the Contract is signed electronically, the Client will receive an additional email with a final PDF copy of the Contract.

Processing times for the setup of new-client accounts vary, but on average, groups are fully implemented in our system within ten business days of receiving their completed submission. Please note that implementation delays will occur if submissions are incomplete. Also, the implementation timeframe may extend up to 30 days during the end/beginning-of-year busy season so we ask that you plan submissions accordingly.

Whenever possible, Choice Strategies recommends submitting new-client applications and enrollments at least 30 days prior to the start of the client's plan, to allow ample time for the plan to be set up and cards to be shipped, although there is no deadline for submitting applications and enrollments.

