Implementation Tips & Checklist

Below are some tips and necessary steps to make the implementation process go smoothly for you and your clients.

IMPLEMENTATION TIPS

1. Review what The Alliance offers to become more familiar with the ways we deliver High-Value Healthcare to employers, employees, and their families.

2. Schedule a planning meeting between the employer, the plan administrator, The Alliance, and yourself to discuss onboarding.

3. Ask about additional discounts available through The Alliance partners (e.g. National CooperativeRx and Delta Dental).

4. Schedule an introductory meeting between the employer and your account executive at The Alliance.

5. Prepare communication to employees and their families describing The Alliance Find a Doctor tool (our online provider directory).

6. If desired, invite a representative from The Alliance to attend a scheduled employee orientation or health benefit fair.

The information indicated should be sent to your primary contact at The Alliance.

IMPLEMENTATION CHECKLIST

- [ ] Please complete these items 30 days prior to The Alliance network effective date.
- [ ] Notify the plan administrator that The Alliance will be utilized.
- [ ] Determine the plan effective date and communicate the date to The Alliance.
- [ ] Sign **The Alliance Membership Agreement** and send to The Alliance.
- [ ] Complete **The Alliance New Group Set-Up Form** and send to The Alliance
- [ ] Submit copies of the plan(s) Summary of Benefits and Coverage (SBC), Summary Plan Description (SPD), and ID card(s) to **salessupport@the-alliance.org**
- [ ] Pay initial fees to The Alliance.

Learn more at
the-alliance.org | 800.223.4139 | info@the-alliance.org

The Alliance
Self-Funding Smart®