The Alliance
Self-Funding Smart®

Employer Implementation Checklist

If self-funding seems complicated, it doesn't have to be. Use this **Employer Implementation Checklist** to compile all your to-dos for self-funding success!

- [ ] 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.
- [ ] As noted in the **New Group Set-Up Form**, submit copies of the plan(s) **Summary of Benefits and Coverage** (SBC).
- [ ] Send **Summary Plan Description** (SPD) and **ID card**(s) to salessupport@the-alliance.org.
- [ ] Pay initial fees to The Alliance.

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

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