

## Enrollment

- ◆ **Open Enrollment** is to be set six (6) calendar days *after* new group paperwork is received by KBA and approved for enrollment to begin.
- ◆ **All enrollments** must be received electronically by the 15<sup>th</sup> of the month prior to the group's effective date.
- ◆ **Portal** is built for Open Enrollment.
- ◆ **Employer** receives an enrollment flyer and enrollment guide for the MEC along with any enrollment materials for the Limited Medical and Critical Illness to distribute to employees 48 hours after completed sold case paperwork.
- ◆ **Enrollment Flyer** — provides the log in information including steps to ensure the employee enrollment process is as easy as possible.
- ◆ **Enrollment Guide** — explains the plan designs and rates of the program.
- ◆ **Enrollment files** will be uploaded to KBA's system to begin the final stage of implementation.

## Welcome Kit

- ◆ **Fifteen (15) calendar days** from the effective date, upon receiving the enrollment information electronically the Employer, the Welcome Kit is produced, Employee Fulfillment and ID cards are generated, and the KeySolution account management team is introduced to the client via an email.
- ◆ **Welcome Kit** includes information for the client and a copy sent to Agent:
  - Administration Guide explaining how ongoing enrollment changes can be made through the EZB on line portal.
  - Plan Document — requiring group's signature, copy sent back to account management team.
  - SBC is included in the Welcome Kit and are for the Employers future use.

## Fulfillment

- ◆ **Employee Fulfillment and ID cards** will be in the mail by the group's effective date.
- ◆ **Employee Fulfillment will include:**
  - ID Cards — one ID card for the MEC and another for the LMI
  - Welcome Letter (*personalized to the member*)
  - MEC “What Now” Sheet (*this is only included in MEC packages*)
  - KeySolution sheet (*instructions on how to login to EZB*)
  - EZB Portal includes:
    - Claim look up
    - Eligibility
    - Provider network look up
    - PBM
    - Forms/documents/duplicate ID cards
  - Cobra Sheet

## Implementation

- ◆ **Last stage of implementation** includes a defined hand-off to the Client Relations team, the client's KeySolution account management representative:
  - Welcome call with the broker and client from the client team reviewing:
    - Contact Sheet — discuss first point of contact
    - First Invoice — discuss and answer questions
    - Plan Document with Signatures
    - Answer any questions