



Consumer Driven Health Plan Account Launch Timeline Template

Four months from Effective Date	
Week 1	
<ul style="list-style-type: none"> • Announcement letter from employer on plan choice 	Employer downloads letter from the BlueIQ Communications Center and sends to their employees. Link provided below.
<ul style="list-style-type: none"> • Schedule on-site education sessions for Open Enrollment 	Sales Representative works with employer to set up schedule
Week 2	
<ul style="list-style-type: none"> • Follow-up email Your medical plan and promotion of upcoming educational session <ul style="list-style-type: none"> – Attachment – Deductible Education Sheet 	Employer downloads email and attachment from the BlueIQ Communications Center and sends to their employees. Link provided below.
Week 3	
<ul style="list-style-type: none"> • Follow-up email #2 Your Spending Account and promotion of upcoming educational session <ul style="list-style-type: none"> – Attachment – HRA/FSA/HSA member education sheet 	Employer downloads email from the BlueIQ Communications Center and sends to their employees. Link provided below.
Week 4	
<ul style="list-style-type: none"> • Follow-up email #3 How your medical plan and spending account work together and promotion of upcoming educational session 	Employer downloads email from the BlueIQ Communications Center and sends to their employees. Link provided below.
<ul style="list-style-type: none"> • Onsite meeting explaining the plan design 	Sales Representative attends and leads session.
<ul style="list-style-type: none"> • Order open enrollment kits <ul style="list-style-type: none"> – Medical plan benefit summary – Spending Account Fact Sheet – Deductible education sheet – Typical costs fact sheet – Medical application 	Sales Representative orders kits and arranges delivery.

Three months from Effective Date	
Week 2	
<ul style="list-style-type: none"> • Letter from employer Outline open enrollment process and highlight plan choices 	Employer drafts and sends letter as part of their open enrollment process.
<ul style="list-style-type: none"> • Follow-up email Benefits presentation schedule reminder 	Sales Representative works with client to draft reminder email to employees.
Week 3 - Open Enrollment Begins	
<ul style="list-style-type: none"> • Distribute open enrollment kits 	Sales Representative ensures kits are delivered to employer for OE.
<ul style="list-style-type: none"> • Follow-up email Benefits Presentation Schedule 	Sales Representative works with client to draft reminder email to employees.
Week 4	
<ul style="list-style-type: none"> • On-site education sessions 	Sales Representative confirms scheduled sessions with employers.
Two months from Effective Date	
Week 2 - Open enrollment ends	
Week 3	
<ul style="list-style-type: none"> • Follow-up email Employer sends confirmation of coverage selections 	Employer drafts and sends notice as part of normal open enrollment process.
One month from Effective Date	
<ul style="list-style-type: none"> • ID card mailed to members 	
<ul style="list-style-type: none"> • Welcome Packet Mailing by Spending Account Administrator 	Package sent via account administrator. Check with your administrator for more information.
Effective date - January	
<ul style="list-style-type: none"> • Follow-up email Member Central registration/tools/email signup 	Employer downloads email and attachment from the BlueIQ Communications Center and sends to their employees. Link provided below.

Link to BlueIQ Communications Center: Consumer-Directed Health Care to download the above mentioned documents:
<http://www.bluecrossma.com/blue-iq/plan-education/consumer-directed-health-care.html>

