

Health Advocate Install Instructions:

The below and attached is the most up to date forms etc for installations. (when B&B is paying.....write B&B on behalf of client name as B&B consulting is the plan sponsor ins this scenario).

In order to get the installation started and send our communication materials to your client, I will need the following items completed and emailed to me from B&B.

- Complete the attached HA Plan Sponsor Agreement, sign and scan and email back to me. The start date is always starts the 1st of a month. The advocacy first year rate is \$ **1.50 pepm.**
The contract is for 36 months.
- Complete the attached Installation form and email back to me.
- Copy of the Medical, Dental, Pharmacy and Vision benefit summaries.
- Census on excel to include first and last name of all eligible employees at a minimum. We would like to have other information such as zip code, birth date and last 4 digits of social.

Ideally, for large groups we want them to send census by FTP. I can share those details if requested.

Please send all the information on one email. If more than one email is appropriate, please # the emails ie 1 of 3, 2 of 3 etc so we know we got them all. I will reply back to every email so you know we have received the information

Once we get the requested installation information. Health Advocate will mail out (see sample attached) by UPS - member Advocacy welcome brochures for all eligible members plus extras, posters and a employee video (<http://www.healthadvocate.com/member-videos/index.html?v=orientation2>) to the HR contact listed on the installation form for distribution. This generally takes about 6 days to have brochures at your client once the installation is completed.