



# Welcome to BenefitsApp

We look forward to working with you in developing your app.

1. Review the timeline and let us know if you have any questions.
2. Review the App checklist.
3. Review the additional icons information to see if you would like to include those in your app.
4. Complete the new app set up form and send us your benefit guide along with any other supplemental documents you would like to include in your app.

Your Client Engagement Manager is:

**Madeleine Wiklund**

Contact Information: [mwiklund@benefitsapp.com](mailto:mwiklund@benefitsapp.com)

Phone Number: 443-844-4598

# App Setup Timeline

Timeline is subject to change based on client approval timing and complexity of the BenefitsApp.

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## **Week 1**

Client reviews the app checklist to determine what to include in the app.

Client sends benefit guide, supplemental documents and the app set up form to BenefitsApp.

Client sends census file if needed.

BenefitsApp develops the App and creates a test user.

## **Week 2**

Client reviews the App and notifies BenefitsApp of any changes.

BenefitsApp develops launch materials – poster and launch email.

BenefitsApp releases the App to the client for final review.

App approval and launch.

# App Setup Checklist

Use this checklist to consider the information you want to feature in your BenefitsApp..

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## Benefits Information Sections

### **Benefits**

Welcome - PDF

Full Benefit Guide - PDF

Open Enrollment

Enrollment Process - PDF

Eligibility - PDF

Enroll Online - Link to Web

### **Medical**

Medical Overview - PDF

Medical Summary - PDF

Find a Doctor - Link to Web

Prescription Information

Supplemental Information

### **Dental**

Dental Plan Overview - PDF

Find a Dentist - Link to Web

### **Vision**

Vision Plan Overview - PDF

Contact Vision Provider - Link to Web

### **Income Protection**

Life and AD&D - PDF

Disability - PDF

HSA - PDF

Retirement - PDF

FSA - PDF

### **Wellness**

Health & Wellness Info

Health & Wellness Coach

Click to call Health Coach

## Quicklinks Section

### **Contact Plan Admin**

Please supply full name, email, and phone number for contact.

### **Benefits Contacts**

This is a list of all contacts found throughout the benefit guide and any other contact you would like to give quick access to.

### **My ID Cards**

Employees can upload digital versions of their ID cards for quick access.

### **National Day Calendar**

Calendar included in every app that includes nationally celebrated days.

## Next Steps

Email all benefits information PDF files to **production@benefitsapp.com**

Follow FTP directions to send secure census data.

Send high resolution logo file to **production@benefitsapp.com**

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Work with your engagement manager to see which features will benefit your company, and customize your BenefitsApp to be exactly what you need.

# BenefitsApp Icons

Additional icons you may want to include in your app.



ScriptSourcing



Benefit Guide



My Benefits



Medical



Dental



Vision



Income Protection



Life Insurance



Accident Insurance



Prescriptions



Wellness



Retirement



Employee Assistance Program



Flexible Spending Account



Health Reimbursement Account



401k



Pet Insurance



Telehealth



Identity Theft



Legal Insurance



Commuter Insurance



Employee Handbook



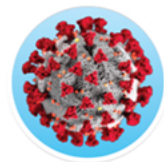
Open Enrollment Videos



ID Cards  
Medical, Vision, Dental



Company Website



Covid Survey



Vaccine Cards



Covid Test Results



Authorization Forms



HIPAA Forms



98Point6



Payroll / PTO



Quality Care Connect



Benefit Rates



Surveys



Travel Insurance

# New App Setup Form

Complete the following for each new BenefitsApp.

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**Company Name/ Logo:** \_\_\_\_\_

**Note:** For logo please link to the website with the company logo, or attach a screenshot or a .jpg file.

**Contact Plan Administrator:**

**Name:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Company Website:** \_\_\_\_\_

**Note:** This can be your website or company specific.

**Files To Send:**

PDF Benefits Guide

**ID Cards:**

Use Upload link for members to upload themselves

Send Sample ID card (Census will populate fields)

*\*Please attach a PDF of the ID cards you would like to have included in the app.*

**Please note:** the name you will use on your census to identify ID cards.

**Icons to Include:**

Medical       Dental       Vision

Life & Disability

Additional Benefits i.e. 401K, Travel, Pet Insurance (See BenefitsApp Checklist and Icon flyer)

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Census File

**Timing of ongoing census file:**  Weekly  Monthly  Other: \_\_\_\_\_

Upload census here: <https://benefitsapp.com/sftp/>

**Note:** Please ensure company name is in the census file name when uploading.