

For additional information see below for a step-by-step guide to complete the group set-up form:

1. GROUP INFORMATION (PAGE 1)

- Select Healthiest You Core or Complete Bundle
- Select 1st of the month effective date.

2. GROUP ADMINISTRATOR INFORMATION (PAGE 1)

- *You can perform administrative functions for your group online with up to 2 people designated as administrators. Administrators have full access to add/change/terminate employees, view or modify non-medical member data and view invoice status.*

3. BILLING & CONTRACT INFORMATION (PAGE 1)

- *Invoices will be generated on the first of each month and sent electronically to the group administrator(s) listed above unless a separate billing contact is listed below.*

4. ELIGIBILITY SUBMISSION METHOD (PAGE 2)

- *Eligibility may be submitted via a one-time census spreadsheet file upload or can be manually entered into the Client Portal.*
- *When choosing Client Portal, credentials and instructions will be provided to the Group Administrator listed on page 1.*
- *When choosing One Time Census Spreadsheet (MFT), credentials and instructions will be provided to the Eligibility/IT Contact(s) provided in this section.*
- *Additionally, certain eligibility may require an ongoing file transfer method (EDI feed). EDI feeds are typically established for groups with 50 employees or more that require frequent updates on a regular basis.*
- *New groups that are submitted after the 1st of the month for the current month's effective date must select and provide eligibility via One Time Census Spreadsheet (MFT) - (e.g., submitted on 12/5 for 12/1 effective date) – unless utilize EDI.*

NOTE: there are 3 methods of Submitting Eligibility:

1. Manual Entry via Client Portal (suggested for 25 employees or less)
2. One-time census spreadsheet (MFT)
3. Ongoing EDI Feed (50 employees and over)

5. BROKER/CONSULTANT INFORMATION (PAGE 3)

- Complete per below

Broker/Consultant Information

Agency Name

Associated Benefits Consulting, LLC

Broker/Consultant Name

Marcie

First Name

O'Dwyer

Last Name

Broker/Consultant Email Address

marciehod@abenefitsconsulting.com

Broker/Consultant Phone Number

(504) 265-1806

Account Manager Name

Kristen

First Name

Bourgeois

Last Name

Account Manager Email Address

kristenb@abenefitsconsulting.com

Account Manager Phone Number

(504) 265-1804

6. HEALTHIEST YOU/TELADOC ACCOUNT EXECUTIVE

- Select "Keaton Anderson" in the drop-down menu.

7. SUBMITTER INFORMATION

- Complete with your information

Once you submit the form, the Teladoc Implementation Team will contact you. They will review instructions on how to complete and upload the attached eligibility file.

Stephanie Lafarga will reach out to schedule a Welcome Call. With this email, you will receive flyers on the Benefit and how to register for Teladoc's Healthiest You, Core or Complete Bundle. You will send any Logos to Stephanie Lafarga at slafarga@teladochealth.com so that she can co-brand the flyers.