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## Implementation Guidelines

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**Step 1:** Fill out pertinent client and plan information

- a) Initial Client Information sheet (Attached)
- b) Plan specifics sheets (Attached)

**Step 2:** Decide on a funding option (*Applies to FSA and HRA Administration only*)

- a) Funding sheet (Attached)
  - If EFT is chosen fill out Bank information sheet
  - If ACH is chosen keep ACH information sheet

**Step 3:** Sign employer confirmation- **BSL will not move forward without having this signed and returned**

- a) BSL sends this once all the above pertinent plan information is gathered

**Step 4:** Once all above information is received, BSL sets the plan up in our system- **5 day system setup**

**Step 5:** Sign Services and Business Associate Agreement

- a) BSL sends this to you

**Step 6:** Send all employee enrollment or census information to BSL- **5 day turnaround time for BSL to enter**

- a) Electronic materials including the enrollment form will be sent once step two (2) has been completed

**Step 7:** Once all participant information has been entered welcome materials will be sent out.

**Step 8:** Employers will then be introduced to your Account Manager who are available to answer day to day questions once implementation has been completed.