

2021 Personal Health Plan Checklist

Your customers experiences are rapidly evolving. Touching base and providing meaningful value to your client's Personal Health Plan is the first step in delivering a superior customer experience.

What's new? What do your clients need to know? Review the follow items with your clients to ensure they have the right options for their Health Insurance needs.

ITEMS TO REVIEW WITH YOUR CLIENTS:

- Add Optional Benefits**
 - Underwritten Benefits: Prescription Drugs, Hospital Cash, Critical Illness, Term Life Insurance
 - Non-underwritten Benefits: Dental, VIP Travel, Student Accident

**Optional Benefits will become effective the first of the month, following the request*
- Add dependent(s)**
 - Newborn baby under 60 days old: no medical questionnaire required
 - Dependent +60 days old - 18 years of age ? Submit an application for review
 - No longer a full-time student? Transition to own plan, no questions asked
- Conversion Plan Policyholders: upgrade to the \$1500 Prescription Drug Benefit**
 - *Conversion Plan Members who held a \$500 Drug Plan, prior to December 31, 2018 may upgrade at their renewal date, no questions asked*
- Complete the [Electronic Deposit Form](#) for claims reimbursement**
- Encourage Member Portal Registration for Personal Health Plan management and self-service options**
 - Need a review? Visit your [Broker FAQ's](#) and [Member Portal Screen Shot](#) resources
 - Need help? See the [Customer FAQ's](#)