

# MedAmerica Simply Business<sup>SM</sup> Employee Education & Enrollment Plan

## Required for Employer-Funded Groups and All Groups of 50+ Eligible Employees

### Phase 1: Education & Awareness - 30 days prior to open enrollment *(check at least one tool you plan to use and indicate dates )*

Dates: \_\_\_\_\_

**Employee Introduction Letter**

On employer's letterhead, signed by employer and mailed to employees, this letter announces the offering of the new plan and lists the dates of the educational meetings.

**Management Meeting—Introduction of LTCi Benefit**

Introduction of new LTCi benefit and announcement of upcoming events. Confirmation of management support for employee participation and scheduling of management consultations.

**Weekly Distribution of Educational Information—Educational e-mails (hard copy available by request)**

Series of 5 one-page flyers: Life Can Change on a Dime; We're Not Talking About Pocket Change; Don't Take It Sitting Down; Planning Ahead is One of the Greatest Gifts you Can Give your Family; and Simplicity<sup>ii</sup> Gives You the Flexibility to Keep Your Life on Track.

**Announcement of Events—Posters and Tent Cards**

Our posters and tent cards can be customized to include your contact information, Web site, open enrollment and seminar details.

**Other (Please Describe)** \_\_\_\_\_

### Phase 2: Open Enrollment *(check at least one tool you plan to use and indicate dates)*

Dates: \_\_\_\_\_

**Educational Meetings—Key Elements *(check all that apply)***

Conducted at workplace during work hours

Employer introduction at each meeting

Employer agrees to mandatory attendance & RSVP's

Seminar evaluation forms will be collected

Personal consultations will be available during work hours

Meetings for family members and retirees available

Other (Please Describe) \_\_\_\_\_

**Online Enrollment & Educational Information *(where available)***

Our turnkey online enrollment system includes educational articles, an easy online enrollment tool and a rate calculator that is available to employees as well as their families and retirees.

**Call Center Enrollment**

Call Center Phone Number: \_\_\_\_\_

**Private Consultations**

Use our application booklet and consumer brochure to help eligibles understand their risk so they can make an informed decision about purchasing an LTCi plan.

**Employer Reminder Notices to Employees**

**Ongoing Services— Educational & Enrollment Services are Ongoing**

New employee enrollment—Simplified underwriting for new actively-at-work employees who apply within 60 days of the date new employee is eligible to participate. (Note: Employer Census required on annual basis.)

Ongoing enrollment of employees and family members with full medical underwriting after the open enrollment period ends.

The employer and agent signed below have reviewed and agree to the above timeline and participation in the Employee Education & Enrollment Plan. Each party also understands that materials may vary by state and are subject to approval of the insurer.

Signature of Authorized Employer Representative: \_\_\_\_\_ Date: \_\_\_\_\_

Agent Signature: \_\_\_\_\_ Date: \_\_\_\_\_

#### MedAmerica Approval Section

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_ Group #: \_\_\_\_\_