FAIRMARKET HEALTH

Onboarding Checklist

45 days before go-live

- [ ] Electronically sign Participation Agreement (need signer's email)
- [ ] Provide access to SPDs and plan designs
- [ ] Provide Census Data (required data fields will be provided)
- [ ] Establish process for keeping the census data timely updated

---

30 days before go-live

- [ ] Approve FMH Benefit Summary (to be prepared based on SPD)
- [ ] Connect bank account for purchases (Stripe link will be provided)
- [ ] Choose HDHP incentives (if applicable) – options will be provided

---

2 weeks before go-live

- [ ] Identify who will need logins and permissions to the platform
- [ ] Complete a 15-minute online demo for admins (recorded)
- [ ] Send client-approved announcement email

Day of go-live

- [ ] Send 2nd client-approved announcement email

---

30 days post go-live

- [ ] Send client-approved reminder email to members
- [ ] Optional: 15-30 minute webinar