



2024 MEDICAL CAPTIVE FORUM | MAY 1ST & 2ND | NEW ORLEANS, LA

# THE BIG EASY APPROACH TO BENEFITS

Quality, Affordable Healthcare Made Simple





# What to Expect When Onboarding with Roundstone



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*Breakout Session at the 2024 Medical Captive Forum*



# Overview: Onboarding Process

1

Binding

2

Onboarding &  
Implementation

3

Signed SPD

4

Policy of  
Insurance



# You got an agreement, now what?

## Let's confirm a few things first:

- Are there any additional changes?
- Which proposal are we binding?
- Who from the agency should receive our electronic binding packet?
- Who at the employer should receive it?



# Binding

## In the first 3 days:

- Roundstone sends the electronic binding packet via DocuSign.
- Customer Outcomes Manager will contact the advisor to set up a walk-through of the electronic binding packet.

## The Binding Packet

1. Your Roundstone Proposal
2. Plan Sponsor Disclosure
3. The Application for Stop Loss Coverage
4. Participation Agreement
5. Binding Invoice
6. ACH Information Sheet
7. Notice Regarding Stop Loss Premiums

# TPA Onboarding Overview

## During Onboarding:

- TPA will initiate the onboarding process (30-45 days before go-live date)
- Plan Documents (SBCs, SPDs) & Supporting member materials
- Setup of Additional Vendors (Telemedicine, EAP, COBRA)
- Census intake & ID Card Delivery
- Administrator Portal, Member Portal, Mobile App Access

## After Onboarding is Complete:

- Once SPD and all other requested binding items are received, Roundstone can issue a policy of insurance and begin paying stop-loss claims

# Overview: After the Effective Date





# What to Expect After Effective Date

## First

**Our Approach:**  
Customer-First Mindset



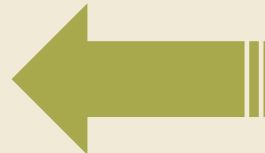
## Second

**Captive Performance Statements:** 45 Days after each Quarter



## Third

**Reporting:** Cost Savings Investigators (CSI) Dashboard

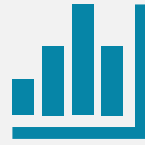


## Fourth

**Ongoing:** Throughout months 4-12, the CSI Team will review claims activity



# The Renewal Process



Claims Reporting from  
your TPA



After 7 to 8 months:  
Renewal Strategy Meeting



Over 90% of Clients Renew

**Q&A**

**Thank you.**