



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

THE BIG EASY APPROACH TO BENEFITS

Quality, Affordable Healthcare Made Simple



Working with Your TPA Effectively



Chris Zirke
General Counsel
at Roundstone

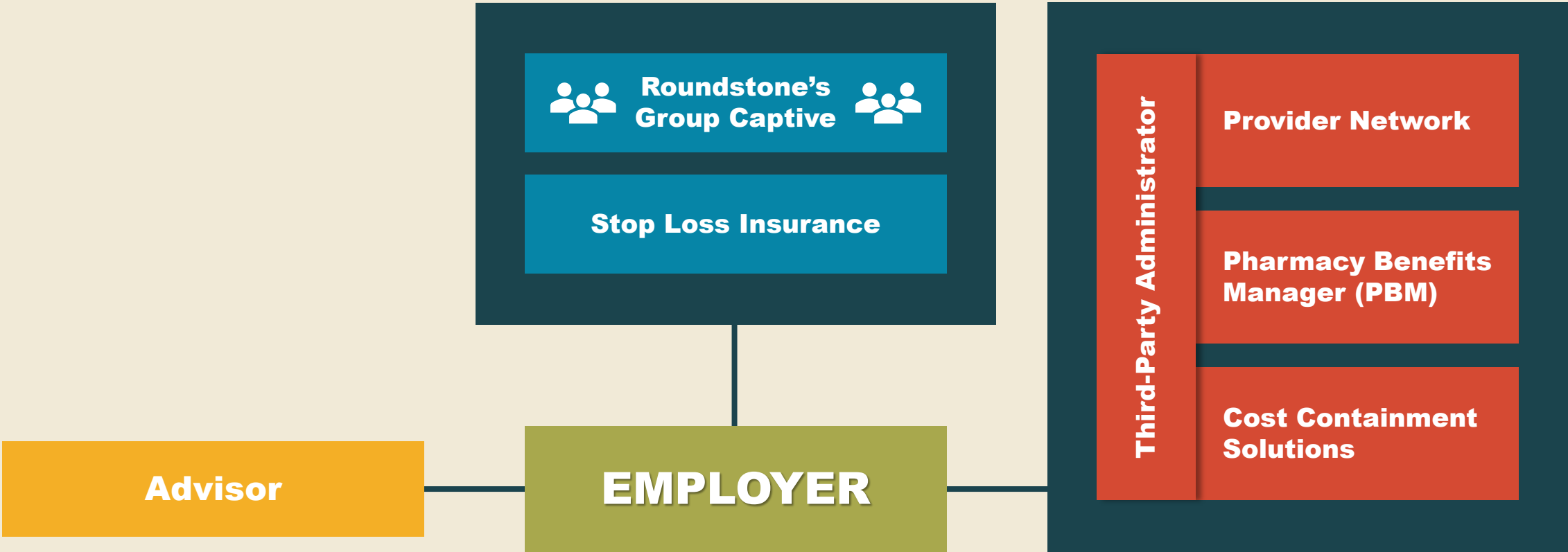


Lisa Kerr
Sales and Onboarding
Manager at Bywater



Lauren Gliha
Stop Loss Claims Team
Lead at Roundstone

Who's Who



Criteria for Vetting TPA's

- **Claim Quality**
- **Network Availability**
- **Programs & Pricing**
- **Ops and Sales Responsiveness/Collaboration**
- **CSI Integration**
- **Cost Containment**
- **Stop Loss Ratio**
- **Renewal/Win Rate**
- **Onboarding Experience**

Onboarding Process Snapshot

During Onboarding:

- TPA will initiate the onboarding process (30-45 days before go-live date)
- Implementation calls to:
 - Gather Group Information & Review Benefits
 - Discuss Accounting and Funding; Set Expectations
- 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:

- Transition to your day-to-day service team
- Claim Processing will begin 45 days post go-live
- Once SPD and all other requested binding items are received, Roundstone can issue a policy of insurance and begin paying stop-loss claims

Client Experience & Ongoing Support

Service

We take the lead on managing service requests by providing expert root cause analysis, streamlined communication, and problem resolution. Dedicated service manager will be assigned to each client.

Resource

As Roundstone's TPA, we work with you to optimize the coordination between Roundstone and Bywater by providing reporting support, compliance assistance, and continuous education and updates on products and services.

Strategic

We identify and optimize cost containment opportunities and provide reporting analysis and consultation. Our goal is to make the most of your data and provide updates on captive performance throughout the year.

The 3 Pillars of Compliance



1

SPD Notices



2

**Notices and Data
Provided by Bywater**



3

**Filings and
Reporting**

Q&A

Thank you.