HRA Administration - SummaCare Plan
Getting Started Checklist

INITIAL SETUP

1. **Setup paperwork – submit executed forms to SummaCare to initiate services.**

   a) Employer Plan Setup & Document Checklist
   b) Services Agreement & Business Associate Agreement

2. **Section 105 plan document and SPD.**
   BASIC NEO can create or restate the Section 105 plan, in BASIC NEO's standard format and customized to client's plan design*.

   *** If the benefits provided under the Section 105 HRA plan are included as part of an existing "wrap" document, or the employer already has a Section 105 plan document that they do not want to replace**, then send a copy of the SPD to BASIC NEO so we can make sure our administration procedures match your written plan.

3. **Employer Admin Resources**
   - Plan Summary Sheet provided to employer with contact info, plan design summary, etc.

ONGOING ADMINISTRATION

Changes, additions and terminations
Submitted to BASIC NEO by weekly electronic file feed from SummaCare.

Claim submission
Submitted to BASIC NEO by weekly electronic file feed from SummaCare.

Reimbursements
Processed weekly and issued directly to providers, with the exception of Rx expenses in which case payment shall be issued directly to the member.

Secure HR portal for Employers:
Access **plan reports**, including YTD Summary Report, payment register, and balances.

Employee's online access
To check account balances, claims and payments, or get forms.

Fund transfer
BASIC NEO will initiate an ACH debit for the amount of reimbursements issued on each processing date. BASIC NEO will notify the employer by email two business days prior to executing the ACH debit.

Contact Info:
- *Submit forms to SummaCare to initiate services*

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Contact Info:

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