

HealthJoy Embedded Navigation “Cheat Sheet”

EVHC

Implementation:

Roles and Responsibilities for Implementation			
Implementation Timeline: 45 Days			
Pre Launch	EVHC	<input type="checkbox"/> Complete intake form <ul style="list-style-type: none"> Confirmation email sent to EVHC team that form was received <input type="checkbox"/> BAA to be sent by EVHC team to client via link <input type="checkbox"/> Ensure client/broker attend webinar <input type="checkbox"/> Provide benefits and eligibility by required deadlines. <ul style="list-style-type: none"> Benefit details - 30 days prior to launch <ul style="list-style-type: none"> <input type="checkbox"/> SBCs - required <input type="checkbox"/> SPD & ID card - when available <input type="checkbox"/> Company Logo - required Eligibility - 15 days prior to launch <ul style="list-style-type: none"> <input type="checkbox"/> Request group is added to Luminare feed - cc' HealthJoy team <input type="checkbox"/> EVHC to review client instance in Dashboard, client to be added to dashboard <ul style="list-style-type: none"> <input type="checkbox"/> Log-in to Dashboard, navigate to Benefits > Preview to review wallet cards and benefit plan details 	
	HealthJoy	<ul style="list-style-type: none"> HJ to send kick-off emails once intake form received HJ to configure app instance (after benefits received) HJ to notify EVHC team to have client added to Trustmark file feeds <p>Customer Experience:</p> <p><i>Less than 500 employee lives</i></p> <ul style="list-style-type: none"> Dedicated Customer Experience Team to support client needs <p><i>More than 500 employee lives</i></p> <ul style="list-style-type: none"> Dedicated Customer Success Manager to support client needs and support member engagement 	
	Client	<ul style="list-style-type: none"> Attend a webinar to learn about HealthJoy services, implementation, and marketing best practices. Whitelist HealthJoy Promote HealthJoy to employees and dependents using resources from the Marketing Portal 	
	EVHC	HealthJoy	Client
Launch Day	1. Check-in with client to ensure launch day communications were sent	1. HJ sends activation email/text to members with contact info	1. Send Launch Day email and activation info to employees
Post Launch	1. Review client reporting as needed in HealthJoy Dashboard	1. PSM to review high-level activation results for BOB and provide helpful suggestions with EVHC leadership	1. Monitor reporting via dashboard 2. Continue promotion of HealthJoy 3. Utilize Broadcaster

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Marketing:

- Embedded Navigation Marketing Portal - this dedicated marketing portal was created to provide marketing materials for year-round use that reflect what is available with Embedded Navigation and provide TPA branding on applicable resources.
 - [Member facing resources](#)
 - [Sales enablement resources](#)
- **Engagement Toolkit** - Recommendations, best practices and suggested timeline for communications
- **Broadcaster** - send in-app communication straight to employee’s mobile phones

Marketing Recommendations that can be shared with Client’s HR team:

Pre- Launch Recommendations		
What	When	Marketing Portal Resource
Mark HealthJoy as a safe sender	2-4 weeks prior to launch	<i>HealthJoy IT Safe Sender Info</i>
Send Awareness Email w/ HealthJoy attachment	1-2 weeks prior to launch	<i>What is HealthJoy - Flyer</i>
Share member success stories to show value and impact of HealthJoy	1-2 weeks prior to launch	<i>Member Stories Section</i>
Launch Day Recommendation		
What	When	Marketing Portal Resource
Send Launch Day email	On Launch Day	<i>HealthJoy Launch Day Email</i>
Share “How to download & Activate” flier in common areas	On Launch Day	<i>How to Download and Activate HealthJoy - Flyer</i>
Consider a Lunch and Learn review Activation flow and features of HealthJoy	Throughout first couple weeks	<i>HealthJoy Embedded Navigation Presentation</i>
Post Launch Recommendation		
What	When	Marketing Portal Resource
Send activation reminders	2+ weeks post launch	<i>HealthJoy Activation Email Template</i>
Share relevant one-pagers, videos, and member FAQs	2+ weeks post launch	<i>Review Flyers and Direct Mailers, Posters sections</i>
Send Quarterly broadcasts to employees with the HealthJoy app	Throughout year	

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HealthJoy Dashboard

- Access client reports and wallet card instances – [HealthJoy Dashboard](#).
 - NOTE: Reporting will be available in the Dashboard 24 hours after client launch
- Support
 - Dashboard walkthrough available [HERE](#)
 - How-To Videos are linked on each page of the Dashboard
 - Help Center in HealthJoy Dashboard
- Quarterly BOB reviews with aggregate reporting across our shared book of business will be added to the Sales Enablement site as they become available.
- All reporting questions should be directed to your Partner Success Manager, Katie Foley.

Resources:

Partner Success Manager: Katie Foley, kfoley@healthjoy.com

Contact your **Partner Success Manager** for...

- Partnership questions
- Process/Operations
- Billing questions

Contact **Implementation Manager** for...

- Questions related to client implementations

Contact success@healthjoy.com or dedicated CSM (clients over >500 lives) for...

- Client-specific questions or changes related..
 - Mid-year Changes
 - Reporting questions
 - Dashboard Help
 - Member-specific questions

Member Engagement Materials: [LINK](#)

Sales Enablement Materials: [LINK](#)

Dashboard: <https://dashboard.healthjoy.com/>

Best Practices:

- Encourage clients to market HealthJoy early and often!

- Activation is key – this can be reviewed in the HealthJoy Dashboard.

- Review Embedded Webinar Kick-off deck and recording

- Utilize reporting tool in the HealthJoy Dashboard to help steer communication plans

- Regularly redirect employees to HealthJoy