



# Implementation Guide



# Contents

- 03** Optimal enrollment practices
- 04** Implementation and professional services
- 05** Implementation milestones: High touch
- 06** Implementation milestones: Low touch
- 07** File requirements for enrollment and beyond
- 08–09** File specifications



## Using this guide

MASA has been protecting groups from high-cost emergency transport bills for over a decade. In that time, we've developed proven best practices for participants to get the most out of our product. By using the guidelines and resources listed throughout this guide, we can work together to ensure employees realize the full value of our benefit.

At MASA, we are here to support you every step of the way. If you need assistance and aren't sure who your implementation Specialist is, contact:

**Implementation@MASAMTS.com**

# Optimal enrollment practices

We recommend these tried-and-tested methods and materials to maximize enrollment.

## Platform optimization

- Maximize placement on enrollment platforms by positioning MASA directly after core health
- Access a resource library of logos, videos, and other content to use on your platform page at our Partner Success Portal
- If a decision support tool exists, contact us for guidance

## Marketing resources

- Engage employees during open enrollment with product flyers and information on the benefit
- Support employees with education through additional media, such as testimonial videos to introduce the benefit during open enrollment
- Utilize the Partner Success Portal for marketing resources listed above and work with your dedicated implementation Specialist on any additional marketing needs

## Employee communication

- Educate employees on how to activate their App account and find information on all benefits
- Work with us to determine post-enrollment communications that accommodate employees and employers' preferred method of communication

**Download materials and resources using the button below:**



**Go to the Partner Success Portal**

# Implementation and professional services

At MASA, we are here to support you at every step of the onboarding process.

## **Dedicated implementation support**

Your implementation team will work with you throughout the entire onboarding process. From managing onboarding and file processing, to coordinating marketing, training, and demos, our support Specialists ensure a positive experience from beginning to end.

- Implementation Specialist response time SLA: 1 business day
  - Escalated issues receive a same-day response
- Digital EDI files are processed in minutes; manual processing takes as little as 2–3 business days

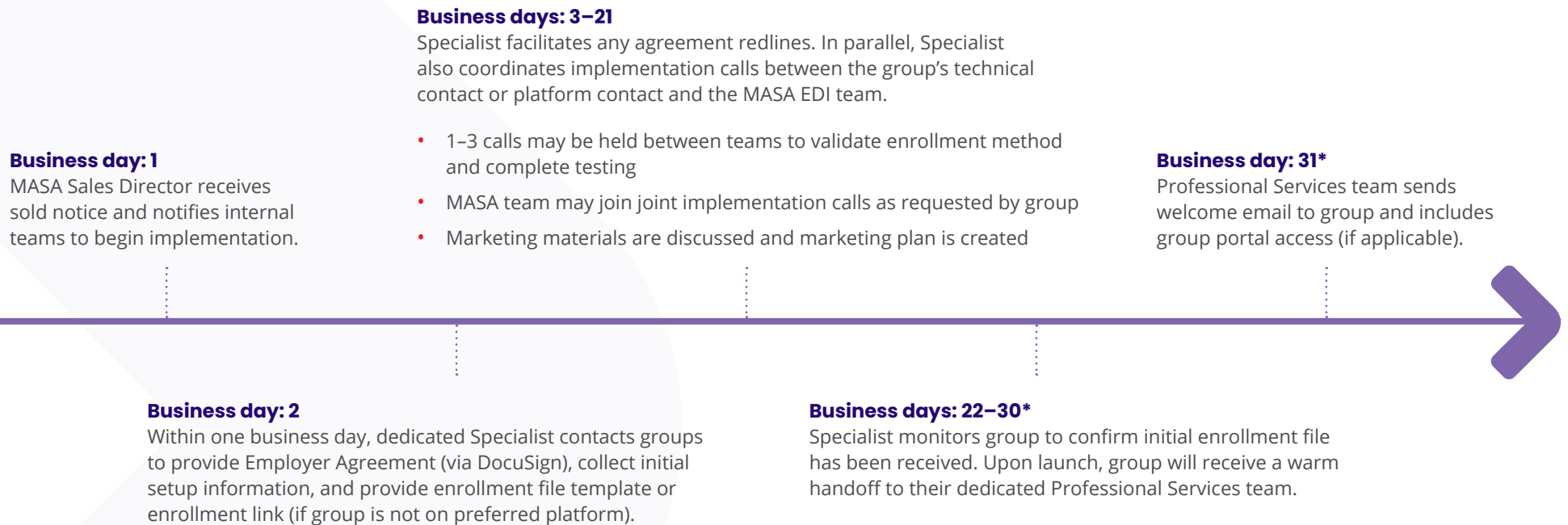
## **Focused Professional Services team**

Our Professional Services team is aligned to your every business need. Our goal is to maximize the return on your investment and to be your key point of contact. They'll provide data and reports that show the value our benefit provides.

- Our Professional Services team has a client satisfaction score of 4.8/5 stars
- Professional Services response time SLA: 1 business day

# Implementation milestones: high touch

Groups that prefer a white-glove implementation experience or require a more advanced technical implementation may opt for this seamless process.



Upon request, your dedicated implementation Specialist can provide a detailed project plan.  
\* Final timeline dependent on group OE and effective dates.

# Implementation milestones: low touch

Groups that prefer a fast implementation or are a smaller business utilizing a platform partner may opt for the efficient process below.

## **Business day: 1**

MASA Sales Director receives sold notice and notifies internal teams to begin implementation.

## **Business day: 2**

Within one business day, dedicated Specialist contacts groups to provide Employer Agreement (via DocuSign), collect initial setup information, and provide enrollment file template or enrollment link (if group is not on preferred platform).

## **Business days: 3–8**

Specialist facilitates any agreement redlines and validates enrollment method has been accepted by group and is operational. Specialist will also provide marketing materials. Average time in implementation process is five business days.

## **Business days: 9\***

Group is ready to launch when initial enrollments are received. Upon launch, group will receive a warm handoff to their dedicated Professional Services team.

## **Business day: 10\***

Professional Services team sends welcome email to group and includes group portal access (if applicable).

Upon request, your dedicated implementation Specialist can provide a detailed project plan.  
\* Final timeline dependent on group OE and effective dates.

# File requirements for enrollment and beyond

EDI files are used to send participant information to MASA in order to enroll participants and maintain coverage.

Initial test file should be submitted first for testing, initial enrollment full file thereafter. Subsequent weekly scheduled file should be a **“changes” only file**. We can accept full files upon request.

Changes-only files will contain new enrollment requests, cancellations or terminations of coverage, and updates to existing policies. Full files contain all active enrollments and will utilize a term by omission strategy.

## SFTP access

We provide an SFTP connection with two subdirectories: One for **testing** purposes, and one for **production** purposes.

Files are transmitted to MASA on a designated frequency of weekly, on the day of the client or benadmin platform's choosing, and deposited on the inbound directory of the SFTP.

## File format requirements

- File should be submitted as a .CSV file
- Test files use the test folder and should be named Test\_GroupCode\_yyyymmdd.csv
- Ongoing file name scheme should be as follows GroupCode\_YYYYmmDD.csv
  - GroupCode\_ is assigned by MASA
  - The file date should be the date that the file is sent to MASA
  - If an open enrollment file, naming convention is GroupCode\_yyyymmdd\_OE.csv

# File specifications

File specification	Description	Requirements
<b>Policy ID</b>	Unique ID for each employee that helps easily reconcile enrollments/payments	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• Can be 9-digit ID sent from the employer</li> <li>• Spouses and dependents must have same Policy ID as the primary employee enrolling for coverage</li> <li>• No special characters (@&amp;lt;_!*)</li> </ul>
<b>Modification</b>	Indication of whether the members contain new enrollment requests, cancellations or terminations of coverage, and updates to existing policies	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• Add: New/reinstating members</li> <li>• Update: Active members with changes to email, address, phone number, etc., OR if the primary employee is adding a spouse and/or dependent</li> <li>• Cancel: Member is ending coverage with MASA. Must include a cancel date in column F (Cancel Date)</li> </ul>
<b>Payment</b>	How the payment is posted to our system. We accept monthly and yearly payments; please inquire if another cadence is needed.	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• MN: Group sends monthly payments</li> <li>• YR: Group sends annual payments</li> </ul>
<b>Product Type</b>	The product plan chosen by member from the available products offered by the group	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• Enter the product code the employee has selected</li> </ul>
<b>Effective Date</b>	Reflects the first day of the first month that the member is being paid for, regardless of the specific day the member elects their benefits	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• Effective Date cannot be more than 3 months in the past or future</li> <li>• Effective Date should only be updated at the start of the new plan year or updating member's product</li> </ul>
<b>Cancel Date</b>	Reflects the last day of the month that the member is being terminated, regardless of the specific day the member is being terminated	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• Cancel Date cannot be more than 3 months in the past or future</li> </ul>
<b>Member Type</b>	-----	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• P = primary (Employee)</li> <li>• S = spouse</li> <li>• D = dependent</li> </ul>



# File specifications

File specification	Description	Requirements
<b>First Name</b>	-----	<b>Required</b>
<b>Middle Name</b>	-----	Not required
<b>Last Name</b>	-----	<b>Required</b>
<b>Benefit Address — Benefit Zip</b>	Physical address for members that benefits will be applied to	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• Address field should be filled in for spouses and/or dependents in addition to primary member</li> <li>• Physical home address is preferred for benefit/claims purposes, however if physical address cannot be provided then the PO Box will suffice</li> </ul>
<b>Mailing Address — Mailing Zip</b>	Address where member materials can be sent to, such as new member packets and replacement coverage cards (if applicable)	<ul style="list-style-type: none"> <li>• Does not need to match the benefit address</li> <li>• Can be left blank if benefit and mailing addresses are the same</li> <li>• Can be a P.O. Box</li> </ul>
<b>Email</b>	The member's personal email address	<ul style="list-style-type: none"> <li>• <b>Required</b></li> <li>• If that personal email address not available to share, please include work email address</li> </ul>
<b>Phone</b>	-----	Not required but please include if available
<b>Birth Date</b>	Member's date of birth	Formatted mm/dd/yyyy Ex. 02/25/1987
<b>Enrolled in HSA eligible plan</b>	Include via Y/N if the member is enrolled in a Health Savings Account (HSA) eligible plan. Ensures MASA appropriately communicates plan requirements should a claim be filed.	Enter Y or N