

2024 Personal Health Plan Checklist

Your customers' experiences are rapidly evolving. Touching base and providing meaningful value to your client's Personal Health Plan investment is the first step in delivering a superior customer experience.

What's new? What do your clients need to know? Review the following items with your clients to ensure they have the right options for their Health Insurance needs.

Items to review with your clients:

Add optional benefits

- **Underwritten Benefits:** Prescription Drugs, Hospital Cash
- **Non-underwritten Benefits:** Dental, VIP Travel

Optional Benefits will become effective the first of the month following the request

Add dependent(s)

- **Newborn baby under 60 days old:** No medical questionnaire required.
- **Dependent between 60 days old and 18 years of age?** Submit an application for review.
- **No longer a full-time student?** Transition to own plan, no questions asked.

Conversion Plan Policyholders

- **Upgrade to the \$1500 Prescription Drug Benefit**

Conversion Plan Members who held a \$500 Drug Plan prior to December 31, 2018 may upgrade at their renewal date, no questions asked

Complete the Electronic Deposit Form for claims reimbursement directly to the member's bank account.

- [Download the form here](#)

Personal Health Plan Member Portal and App

- **Encourage members to register for the [Personal Member Portal](#) to manage their personal health plan, including self-service options.** Members can manage their Personal Health Plan using the [member portal](#) or [mobile app](#). They'll enjoy convenient claiming, quick reimbursement direct to their bank account, plus access to details including plan maximums, coverage limitations, and plan usage.
- **Share our [FAQs: Personal Member Portal & App](#) or how-to videos to help members get started:**
 - [How to check your coverage: Personal Health Plan Members](#)
 - [How to submit a claim: Personal Health Plan Members](#)
 - [How to check the status of a claim: Personal Health Plan Members](#)
 - [How to download your premium receipt: Personal Health Plan Members](#)

☑ Share the Blue Advantage program

- The [Blue Advantage Program](#) allows Blue Cross members to save on medical, vision care and many other products and services offered by participating providers across Canada.

The program is unique because it provides savings at point of sale on the total cost of products and services from participating providers across Canada, regardless if the item is covered under your benefits plan. Simply present your Blue Cross identification card to the participating provider and mention the Blue Advantage program. [Learn more here.](#)

☑ Share Stronger Minds by MindBeacon

- Members have access to free, reliable, and relatable mental health information through [Stronger Minds by MindBeacon](#). They offer day-to-day guidance from their team of clinical psychologists and access to videos, quick reads, and resilience-building activities.