You've Chosen Peak1… What's Next?

The Peak1 Implementation Process - Easy as 1, 2, 3

What comes next after you choose the Peak1 system? Your Peak1 sales professional will introduce you to an experienced Implementation Coordinator, who will guide our three-stage process to get you up and running as quickly and easily as possible. Phone, email, and GoToMeeting are used extensively throughout implementation to maintain effective communication and momentum.

Stage 1: Introduction & Overview

Stage 2: Account Setup

Stage 3: Plan Management & On-Going Service

Stage 1: Introduction and Overview

Your implementation coordinator meets by phone with everyone who will have any role with the software, including operations and IT personnel, to make introductions and create the implementation project plan.

Stage 2: Integration and Account Setup

In this stage, your staff is trained on the details of system operation and the specific steps involved in completing various tasks.

Your implementation coordinator will assist you in setting up your first groups, developing your migration plan, and learning and verifying the migration process.

Stage 3: Plan Management and On-Going Service

Once integration and account setup have been completed, your account manager will request eligibility data. Eligibility data can be sent using an export form on your HRIS or payroll system. Once the data is imported and verified by Peak1, debit cards are ordered and the plan is ready for claims processing. Enrollment confirmations are sent to each participant with instructions on how to access to peak1 portal.

7600 Mineral Drive, Suite 450 Coeur d'Alene, Idaho 83815 // 877.404.9443 // sales@mypeak1.com