

ENROLLMENT INSTRUCTIONS/TEMPLATE

Instructions

- Please email enrollments with email subject in the following format: New Member_Employer ie. “New Member_Mercy” to **Yesenia Perez, Laura Rodriguez, Rita Ravenna, and Cindy Moro**
- Fill out all boxes below
- Bold sections are mandatory (If the member does not have an email address, please write “No Email”)
- Italic sections are employer specific – Please leave blank if unnecessary.
- In the Notes section, please include the Preferred Contact Method followed by the Program in the format shown. Any additional notes go in parenthesis ie. Preferred Time, “Goes by nickname” etc. which goes after the Method and Program
 - If member requests specifics for coach assignment please provide note in parenthesis BEFORE Method and Program ie. Requests a specific coach, “Spanish Speaker”, “Requested RD” etc.
- Multiple enrollments may be sent in the same email by copying multiple tables below – Please ensure all multiples are within the same employer group that is listed in the subject line
- Please continue to send enrollments over as best as possible in real time (ie. Do not wait until the end of the day to send all)

Sample

PARTNER	EMPLOYER	FIRST NAME	LAST NAME	DATE CONTACTED MARQUEE	MEMBER CONTACTED US METHOD
WellRight	Mercy	John	Smith	2/2/2022	Phone

NOTES - Phone/Email. Program. (Additional notes)	EMAIL	PHONE	ID NUMBER	EE/SPOUSE	DOB	SSN	EE NAME	EE DOB	City, State, Country
Phone. UBreathe RAS. (Prefers 3p CST)	John.smith@email.com	555.555.5555	555555	Spouse	5/5/1955		Jane Smith	6/6/1966	Chicago, IL

