GETTING STARTED

New Guide Checklist

We know it can be difficult to put together a brand-new guide, so below is a checklist to get you heading in the right direction. Our team **cannot get started** on a new benefit guide without the following information:

- [x] High-resolution client logo (at least 300 DPI; JPG, PNG or EPS format) and brand guidelines, if any

- [x] Previous broker's guide for reference (if available)
  - ***Note:*** We cannot work directly off the previous broker's guide or use their content. While some of the information may still be relevant, we need to use our standard content that has been developed.

- [x] ***All*** language and plan grids, ordered and written as they should appear in the guide
  - To access our standard language, visit the Creative Solutions website at **www.csbcreative.com** (Password: **CSBCreative11**). You will find the **Content Library** on the **Tools and Resources** page. The Content Library is set up how a guide would flow. You can pull whatever information is needed (from the previous guide and/or content library) into a Word document, outlining how you would like it to appear in the guide. **Here is a link to a sample that was provided for another client** so you can see a visual.
  - Under **Tools & Resources** on the Creative Solutions site, you will also find a section labeled **Request Forms & Templates**. Here you will find sample plan grids. The account team must provide all plans in an editable (Excel) format when submitting content for the guide. We cannot work off of PDFs or images (JPG, PNG) plan summaries.

- [x] ***All*** legal notices that need to be included in the guide
  - ***Note:*** Certain notices are non-standard and need to be completed/customized by the account team (Creditable Coverage, Marketplace Notice, COBRA, etc.) If you have questions about which notices should be included in a guide, please discuss with the Consultant or Compliance Team.

- [x] Carrier contacts (if applicable)
  - On the Creative Solutions site, under **Request Forms & Templates**, you will find a **Carrier Contact Form**. please complete this form if you would like a carrier contact table added to the guide.

THINGS TO KEEP IN MIND

- Our standard turnaround time to build out a brand-new guide is 7–10 business days. Please reach out to the Creative Solutions team if you have questions about timing.
- If any of the above information is missing from your Lytho request, the request will be denied and you will be asked to resubmit once all the information has been gathered.
- If the client has specific requests for images or would like to use their own images, Please provide/let us know in your original request.
- Have the client review the content of the guide before we design it – the closer we can get to the content being approved, the more it will help cut down on numerous versions.