

PHIA DOCUMENT MANAGEMENT® (PDM)

Plan With Us...

Frequently Asked Questions

What is Phia Document Management®?

Phia Document Management®, or PDM, is The Phia Group's online plan drafting software that allows the user to build, edit, and produce plan documents. PDM presents a user-friendly interface for plan drafters of all experience levels and allows unlimited document creation for a flat monthly fee.

Does The Phia Group have template materials we can use?

Yes. In addition to using The Phia Group's existing templates, subscribers can work with The Phia Group's PDM team to create a customized template.

Are there experts available if we need assistance using the software?

Yes. Although the plan drafting process with PDM is designed to be automated, The Phia Group has a dedicated team of consultants available to answer any PDM related questions a user may have.

Is there a limit on how many documents I can draft using PDM?

No. Users will have access to unlimited drafting.

What types of plan documents can be created using PDM?

Users of PDM can create major medical plans, Summary of Benefits and Coverage (SBCs), cafeteria plans, wrap documents, HRA documents and preventive care only plans. Our major medical template even has options to create a traditional PPO or reference-based pricing plan design.

How easy is to create plan documents using PDM?

Really easy. The Phia Group's template checklist is designed to be intuitive and straightforward, and PDM even provides the user the option to duplicate a completed checklist for simplified creation of similar plan documents. Once a checklist is completed, the variables in the template plan document will automatically populate, and a plan document is born.



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