

Service Specialties

2011 – 2012 Areas of Focus

- The Benefit Butler
- “Head to Toe” Wellness Program
- Comprehensive Compliance Services
 - Audits, implementation and ongoing management
 - Topics of:
 - ERISA, COBRA, HIPAA
 - Patient Protection and Affordable Care Act (PPACA)

Strategic Planning

- **Benefit Strategies** – develop short and long term program strategies
- **Benefit Plan Check-up/Analysis** – evaluate current benefit program in the areas of plan design, marketplace norms, competitor data, and financial performance
- **Plan Design** – develop recommendations and solutions consistent with corporate objectives and competitive landscape
- **Market Evaluation (RFP or Quote Process)** – evaluate and market portions of the benefit portfolio
- **Vendor/Plan Performance** – negotiate guarantees and evaluate vendor performance
- **Employer Regulatory Compliance** – audit existing policies and procedures, monitor and communicate new regulations
- **Executive Recruiting Services** – offered on an as needed basis

Financial Plan Management

- **Financial Reporting** – prepare regular reporting that includes analysis of claims, in-force, high claimants, utilization, network, medical management, pharmacy and overall plan performance
- **Renewals** – secure and negotiate renewals, including financial analysis and overall outcomes
- **Performance Recommendations** – analyze performance including claim experience, utilization, network discounts, pharmacy and market standards
- **Projections** – provide financial projections for accounting and budget modeling
- **Reserves** – calculate and monitor reserve accruals and accounting methodologies
- **5500s** – collect data, complete and prepare for submission
- **Contribution Strategies** – develop prototypes consistent with claim experience and market/competitive norms
- **Demographic Analysis** – evaluate employee demographics and cost implications
- **Carrier/Vendor Audits** – assess carriers and vendors, including financial performance, benefit payments and policies and procedures
- **Mergers and Acquisitions** – provide direction and financial analysis of new benefit programs

Value Exceptional Service
Experience Accountability

Do these words describe your
current broker or consultant?

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Service and Benefit Administration

- **Service Management** – produce monthly service report, review performance and issues
- **Vendor Management** – facilitate quarterly review of vendors' performance and issues
- **Claim/Customer Service Management** – monitor and evaluate timeliness and quality of claim processing, telephone service and provider negotiations
- **Benefit Advocacy** – interface with client and vendors for all issues
- **Claim Resolution and Support** – interface with client and individual employees to resolve claim and appeal issues
- **Employee Service** – work directly with individual employees to resolve benefit administration issues
- **Billing** – provide guidance and oversee set-up and ongoing management of vendor bills
- **Eligibility** – interface with client and vendors to resolve eligibility issues/discrepancies and manage ongoing enrollment
- **Audits** – define, execute and manage audits of dependent status, eligibility, and claims
- **Contracts and Agreements** – develop, review and manage issuance of all contractual documents
- **Summary Plan Descriptions and Certificates** – develop and/or review and finalize plan documents
- **COBRA, HIPAA, ERISA, FMLA, etc** – provide expertise, guidance and solutions for all state and federal legislative requirements
- **Human Resource Policies and Procedures** – provide expertise and guidance in developing internal policies
- **COBRA Administration Outsourcing*** – facilitate outsourcing with matrix partner
- **Online Enrollment*** – manage implementation and services with an outsourced partner

Benefit Communication and Employee Education[^]

- **Communication Strategy** – develop and implement a strategic plan to include employees and their families
- **Employee Education and Communication**
 - develop and manage all communication including written, electronic, virtual meetings, conference calls, 1:1s, audio recordings, and social media tools
 - educate employees on their benefits via communication tools
- **Open Enrollment** – develop the strategy, implement the tasks, develop all communications, manage vendor tasks and lead employee education
- **Benefit Statements** – develop and deliver hidden paychecks and benefit confirmation statements
- **Employee Surveys** – develop, execute and evaluate surveys with various scope: overall employment/company, benefit programs, wellness initiatives, etc.
- **Focus Groups** – develop and conduct group sessions; provide analysis
- **Wellness Strategies, Programs and Oversight** – design and implement programs, surveys, risk assessments and other wellness strategies

** Resource and service outsourced to matrix partner; cost to be negotiated; generally not included in base compensation*

^ Certain costs for services and products (including professional printing and postage) to be negotiated