GROUP NAME: New Client Onboarding

Account Manager:______________________________

GROUP INFORMATION

Executive Contact: *name, phone, e-mail*	
HR/ Plan Admin Contact: *name, phone, e-mail*	
# of Locations (please specify): *city, state*	
# Full-Time Employees	
# Part-Time Employees	

BENEFITS DETAILS - MEDICAL, ANCILLARY, WORKSITE

BENEFIT	CARRIER	RENEWAL DATE	ER CONTRIBUTION % or $
Medical			
Dental			
Vision			
Life/ADD			
Short-Term Disability			
Long-Term Disablity			
Critical Illness/Cancer			
Accident			

Cafeteria Plan			
COBRA Administrator			
Current ben-admin sytem			

BENEFITS PROCESS	
New Hire Waiting Period:	
Benefits Eligibility: *ex: all employees working 30+ hrs/week*	
# of pay periods: (i.e. 52/26/24/12) (Broken out by employee class?)	
Enrollment Process (paper/online): *specify online system*	Online
Enrollment Meetings: *ex: locations, similiarly situated employees*	

COMPLIANCE	
Notices: *HCR, WCHRA, Medicaid-chip, over-the-counter, fsa limit*	
CMS Letter & Disclosure:	
SPD & Distribution:	
5500 Filing (if applicable): *wrapped or unwrapped?*	
Status Classification: *(are benefits class specific) (i.e. mgmt,salary,hourly)*	
Affiliated Companies/Common Ownership	

WELLNESS + HR	
Wellness Program: *ex: health assessments, use of wellness data, wellness committee*	

HR/Benefits Portal: (Sully & Acct Mgr)	
HR Compliance Audit: (Sully & Acct Mgr) *ex: I-9/e-verify, handbook audit, labor law postings, personnel filing, EEOC reporting, FMLA compliance*	

OTHER (ACCOUNT-SPECIFIC) Date of new client ______________			
Entered Account Data into Broker Builder (AM)	Yes ☐	No ☐	Date:__________
Welcome Call and Consultation (sully, broker, acct mgr)	Yes ☐	No ☐	Date:__________
Onboarding meeting with new client scheduled (sully, broker, acct mgr)	Yes ☐	No ☐	Date:__________
Client web page with documents built (sully & acct mgr)	Yes ☐	No ☐	Date:__________
Benefit guide provided (broker & acct mgr)	Yes ☐	No ☐	Date:__________
DMW access NDA secured (if applicable)	Yes ☐	No ☐	Date:__________
ThinkHR access set up (sully)	Yes ☐	No ☐	Date:__________
Benefit app built (sully and acct mgr)	Yes ☐	No ☐	Date:__________

GROUP NAME
STRATEGIC ON-BOARDING PLAN

1. Welcome + Planning Phase

ACTION ITEM	TARGET DATE	C&C DESIGNEE	GN DESIGNEE
Welcome meeting: *meet the team, collect account details, discuss strategic goals, discuss plan design & benefit offerings*		Broker/Acct Mgr	
Add Contacts to E-mail Lists: *health care reform updates, inforum invites, wellness newsletter, etc (Broker Specific Lists)*		Sully	

2. Information Collection - to C&C

ACTION ITEM	TARGET DATE	C&C DESIGNEE	GN DESIGNEE
Up-to-Date Census		Acct Mgr	
All Plan Documents: *summaries, contracts,2 most recent medical renewals, and plan amendments (Get from Carriers)*		Acct Mgr	
Benefit Communication Materials: *enrollment materials (new hires & open enrollment)*		Act Mgr/Broker	
Most Recent Invoices: *most recent invoices (get from Carriers)*		Acct Mgr	

3. Benefits & Enrollment Strategy

ACTION ITEM	TARGET DATE	C&C DESIGNEE	GN DESIGNEE
Plan Design: *review claims data (if available), cost-benefit analysis of current strategy & plan design options*		Broker	

Cost Control: *review premium cost-sharing, alternate funding options, cost-benefit analysis of current strategy & options*		Broker	
Voluntary & Worksite Offerings: *evaluate strategy vs. benchmark analysis, review employee participation*		Broker	
Carrier Partnerships: *evaluate current relationships, identify opportunities for improvement*		Broker/Acct Mgr	
Administration Services (Cafeteria Plan, Alternate Funding, COBRA/HIPAA): *evaluate current relationships, identify opportunities for improvement*		Broker/Acct Mgr	
Pre-Enrollment: *evaluate past enrollments, identify opportunites for improvement*		Broker/Acct Mgr	
Open/Annual Enrollment: *enrollment proccess, identify opportunities for improvement*		Broker/Acct Mgr	
Post-Enrollment: *evaluate past enrollments, identify opportunites for improvement*		Broker/Acct Mgr	
Create Open-Enrollment Timeline:		Acct Mgr/Client	

4. Wellness

ACTION ITEM	TARGET DATE	C&C DESIGNEE	GN DESIGNEE
Wellness Program: *meet with C&C staff to discuss & evaluate current wellness initiatives; including potential legal exposures*		Broker	
Develop Wellness Goals & Objectives:		Broker	
Provide Strategic Recommendations: *ideas & recommendations to meet wellness goals & objectives*		Broker	
Wellness Implementation Timeline: *roll out new initiatives, create plan to support ongoing initiatives*		Broker	

5. Human Resources

ACTION ITEM	TARGET DATE	C&C DESIGNEE	GN DESIGNEE
Human Resources Support: *hr audit to identify potential legal exposures and opportunities for improvement*		Sully?/Broker	
Ben-Admin Portal: *build out portal (if applicable)*		Acct Mgr	

6. Compliance

ACTION ITEM	TARGET DATE	C&C DESIGNEE	GN DESIGNEE
Compliance Audit: *identify potential legal exposures and opportunities for improvement*		Sully?/Broler	
ThinkHR: *supply group with log in and information on ThinkHR*		Sully	