

Checklist



Benefits to Replace (may vary)

- | | | |
|----------------------------------|-------------------------------------|---|
| <input type="checkbox"/> Medical | <input type="checkbox"/> Life | <input type="checkbox"/> FSA |
| <input type="checkbox"/> Dental | <input type="checkbox"/> Disability | <input type="checkbox"/> 401(k) |
| <input type="checkbox"/> Vision | <input type="checkbox"/> EAP | <input type="checkbox"/> Work Comp/EPLI |

Services to Replace

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> Payroll/HRIS | <input type="checkbox"/> HR Service |
| <input type="checkbox"/> COBRA Admin | <input type="checkbox"/> Tech (online enrollment/eligibility) |

Items to Request From Prospect

- | | | |
|---|--|--|
| <input type="checkbox"/> Monthly invoice (chargeback) | <input type="checkbox"/> Plan Summaries | <input type="checkbox"/> Benefit Rates (Current and Renewal) |
| <input type="checkbox"/> Benefits Register (invoice) | <input type="checkbox"/> Employee census | <input type="checkbox"/> Employer Contributions |

Things to Consider

- | | | |
|--|---|---|
| <input type="checkbox"/> Timing (tax implications) | <input type="checkbox"/> Term Requirement from PEO | <input type="checkbox"/> ACA Compliance |
| <input type="checkbox"/> Number of w-2's | <input type="checkbox"/> COBRA (who takes COBRA participants) | <input type="checkbox"/> FSA/Transit Transition |

Potential Carrier Requirements

- BOR (Kaiser will require)
- Under 100 Lives (invoice or register in lieu of DE-9C)
- Standard new business paperwork (to include Kaiser)