



Renewal Process Checklist & Action Plan

Across the nation, employers are reviewing and considering how employee benefits circumstances have changed among prescription drug plans, short- and long-term disability insurance, voluntary benefits, and health care benefits in order to fortify their recruitment, retention, and group health and welfare efforts. It's important that you evaluate your company's benefit plan design and year-round strategy before investing more than you should.

INSTRUCTIONS: Please rate how well your organization completes the following tasks on a scale of 1 to 5, with a rating of 1 signaling something your organization does not do and a rating of 5 signaling something your organization does extremely well.

HOW WELL DOES YOUR ORGANIZATION...	1-5
Offer employees resources to help them be smarter health care consumers?	
Provide a detailed benefits guide to new and current employees during open enrollment?	
Answer employee health care questions?	
Explore new market innovations or funding options for group health plans?	
Provide employees with a varied plan design to fit their unique health care needs?	
Offer a competitive group medical plan for your industry?	
Review your benefits package on a regular basis?	
Conduct frequent health care compliance audits?	
Invest in employee wellbeing?	
Prepare for potential health care changes?	
Understand your legal obligations under the HIPAA Privacy Rules and Affordable Care Act?	
Utilize important HR tools, such as surveys, checklists, interviews, applications, letters and forms?	
Conduct employee satisfaction surveys?	
Offer additional voluntary plan designs?	
Review your contribution strategy on an annual basis?	

TOTAL SCORE:

UNDERSTANDING YOUR SCORE

If you scored between 15 - 40: Your organization's benefit plan could use some assistance! Talk to our experts at CBIZ Employee Benefits as soon as possible to re-evaluate your health care solutions ahead of renewal season.

If you scored between 41 - 60: Your organization's benefit plan is meeting expectations, but still has room for improvement. Reach out today to discuss your specific pain points and start transforming your plan from good to great.

If you scored between 61 - 75: Your benefit plan is excellent! You've taken the time to communicate with your employees, chosen a plan that meets their needs, and continue to evaluate your plan to ensure it's up to par.

TO GET IN TOUCH WITH AN EXPERT, VISIT US AT
cbiz.com/employeebenefits