What Employer Info Do I Need?

Below is an overview of the plan and employer information needed to complete the setup questionnaire:

Health & Wellness

Company Name

Employer Type
›› Private Sector
›› Nonfederal Government
›› Church
›› Number of Full-Time &
   Part-Time Employees

Plan Funding
›› Self-Insured
›› Level Funding
›› Fully Insured

Plan Anniversary Date

Subject to COBRA

Access to PHI

Contributions Made through

Cafeteria Plan or POP

Number of Employee Plan

Participants

Established Trust

Grandfathered Status

Plan Coverage
›› Prescription Drug
›› Mental Health & Substance Abuse
›› Maternity Care Coverage
›› Health Savings Account
›› Health Reimbursement Arrangement
›› Health Flexible Spending Account
›› Dependent Care Assistance Program
›› Retiree Coverage

State/District Law
›› States where the client has employees
   and/or offers coverage

Wellness Plan
›› Tied to health plan?
›› Provides medical care?
›› Participants receive incentives?

User Information
›› First and Last Name
›› Email Address
›› User View

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What Employer Info Do I Need?

Below is an overview of the plan and employer information needed to complete the setup questionnaire:

401(k)

Company Name

Employer Type
» Private Sector
» Nonfederal Government
» Church

Employer Size

Plan Anniversary Date

Plan Fiduciaries

Payroll Deferral Deposit Reminders
» Weekly or Bi-Weekly Payroll (Every Friday or every other Friday)
» Monthly or Bi-Monthly Payroll (1st or 15th of the month)

Automatic Enrollment Plan Document
» Pre-Approved
» Individually Designed, with Plan Cycle

Traditional or Safe Harbor Plan

Who Performs Nondiscrimination Testing?

QDIAs

Participant Directed

Risk Management

Plan Design & Safe Harbor Elections Organizational Details

Plan Investment/ Benefit Committee

Covered Service Providers

Basic Plan Eligibility Terms

Governing Documents

Plan Investments:
» Designated Investment Alternatives

Plan Administration:
» Fiduciary Duties
» Non-Fiduciary Duties

User Information
» First and Last Name
» Email Address
» User View

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