

Reynolds & Reynolds Inc

Outsourcing Department Capabilities

The Outsourcing Department was designed to assist our clients with everyday benefit administration responsibilities. Our current staff consists of a department manager and two benefit administrators. We would assign you to a benefit administrator who would handle those daily administrative tasks while you would still continue to work with your account manager to handle plan administration.

Listed below, please find the optional tasks that we could do for you.

New Hire Process

- ✓ With the appropriate access, we could generate this report on your desired frequency (weekly, bi-weekly, monthly)
- ✓ Mailing of new hire packets
- ✓ Online report of who packets were mailed to with a reminder notice sent 15 days prior to deadline
- ✓ Online report of who has returned their forms, whether accepting or waiving coverage
- ✓ Will make several attempts to receive all forms pursuant to the Section 125 guidelines

Enrollment Process

- ✓ Receive enrollment or change in status materials and verify information
- ✓ With the appropriate access, we could enter this information into the payroll system to set-up deductions
- ✓ Notify all carriers of the new enrollees on a weekly or bi-weekly frequency
- ✓ Notify all carriers of an enrollee's change in status on a daily or weekly frequency
- ✓ Notify COBRA administrator to send out initial notice

Termination Process

- ✓ With the appropriate access, we could generate this report on your desired frequency (weekly, bi-weekly, monthly)
- ✓ Notify all carriers of terminations
- ✓ Notify COBRA administrator of the COBRA event

Billing/Reconciliation

- ✓ With the appropriate access, we could generate a monthly deduction for each benefit
- ✓ Reconcile bill for payments
- ✓ Submit bill for payment to you
- ✓ Track deductions and payments on a monthly basis

Documentation

- ✓ Employee files kept on-site
- ✓ Reports and bills will be kept within our agency management system
- ✓ Return mail is tracked via a spreadsheet

- ❑ **401(k)**
 - ✓ Determine eligibility with appropriate access to your payroll system
 - ✓ Mail eligibility letter or packet to participant
 - ✓ Process enrollment paperwork within payroll system and notify carrier
 - ✓ If loans are applicable, we can set-up the payroll deduction for loans and monitor those for payoff
 - ✓ For withdrawals, we can review and send to you for approval
 - ✓ Annual ADP/ACP testing, we can assist in this process with the appropriate access
 - ✓ QDRO, assist in the process of getting this set-up

- ❑ **Court Orders (Medical)**
 - ✓ Review for eligibility
 - ✓ Process enrollment, if necessary
 - ✓ Correspond with employee and applicable agency

- ❑ **State Mandated Disability**
 - ✓ Determine if applicable
 - ✓ Complete the employer required information for each claimant

- ❑ **Disability Claims**
 - ✓ Completion of the employer statements, provided applicable access is in place
 - ✓ Gathering of any additional documents that may be required from the employer

- ❑ **Life Claims**
 - ✓ Initiate this process with the employee
 - ✓ Complete the required employer paperwork
 - ✓ Follow the process until the claim is complete

- ❑ **Employee Communications**
 - ✓ Facilitate the mailing of the Summary Plan Descriptions as well as any plan amendments
 - ✓ Preparation of any letters or documents that may be mailed to the employee on your behalf

- ❑ **Open Enrollment**
 - ✓ We will facilitate this process from start to finish with the appropriate required notices within a complete packet

- ❑ **Employee Benefits Center**
 - ✓ Call center for your employees to call in and ask any benefit related question
 - ✓ Available 8:00 – 4:30 CST, Monday thru Friday