

Zenefits Plan Data Collection Checklist

PREREQUISITES FOR ZENEFITS IMPLEMENTATION

The Zenefits implementation process must be started at a minimum **60 days** before any group-level enrollment event. Please provide all relevant plan information below and indicate which documents have been provided to the Zenefits Implementation team.

Carrier Plan Name Policy #	Documents	Data
Medical Example: Anthem Blue Cross PPO 500 #194823 Number of plans: 1	<input type="checkbox"/> Current plan year SBCs for each plan. Previous plan year SBCs or summaries cannot be used. <input type="checkbox"/> Carrier rate sheet for each enrollment tier for plan and/or highlight rates within renewal packets. <input type="checkbox"/> Most recent invoice <input type="checkbox"/> Enrollment Census including EE/DEP Information	Effective Date <input type="text"/> Renewal Date <input type="text"/> Rate Type <input type="checkbox"/> Age-band <input type="checkbox"/> Composite <input type="text"/> Waiting period for new hires <input type="text"/> Termination policy
Dental <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Number of plans:	<input type="checkbox"/> Current plan year SBCs for each plan. Previous plan year SBCs or summaries cannot be used. <input type="checkbox"/> Carrier rate sheet for each enrollment tier for plan and/or highlight rates within renewal packets. <input type="checkbox"/> Most recent invoice <input type="checkbox"/> Enrollment Census including EE/DEP Information	Effective Date <input type="text"/> Renewal Date <input type="text"/> <input type="text"/> Waiting period for new hires <input type="text"/> Termination policy
Vision <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Number of plans:	<input type="checkbox"/> Current plan year SBCs for each plan. Previous plan year SBCs or summaries cannot be used. <input type="checkbox"/> Carrier rate sheet for each enrollment tier for plan and/or highlight rates within renewal packets. <input type="checkbox"/> Most recent invoice <input type="checkbox"/> Enrollment Census including EE/DEP Information	Effective Date <input type="text"/> Renewal Date <input type="text"/> <input type="text"/> Waiting period for new hires <input type="text"/> Termination policy
Life <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Number of plans:	<input type="checkbox"/> Current plan year SBCs for each plan. Previous plan year SBCs or summaries cannot be used. <input type="checkbox"/> Carrier rate sheet for each enrollment tier for plan and/or highlight rates within renewal packets. <input type="checkbox"/> Most recent invoice <input type="checkbox"/> Enrollment Census including EE/DEP Information and coverage volumes	Effective Date <input type="text"/> Renewal Date <input type="text"/> <input type="checkbox"/> Check if bundled with AD&D <input type="text"/> Waiting period for new hires <input type="text"/> Termination policy

STD <div></div> <div></div> <div></div> <div></div> <div></div>	<input type="checkbox"/> Current plan year SBCs for each plan. Previous plan year SBCs or summaries cannot be used. <input type="checkbox"/> Carrier rate sheet for each enrollment tier for plan and/or highlight rates within renewal packets. <input type="checkbox"/> Most recent invoice	Effective Date <div></div> Renewal Date <div></div> Rate Type <input type="checkbox"/> Age-banded <input type="checkbox"/> Fixed rate per \$10
Number of plans:	<input type="checkbox"/> Enrollment Census including EE/DEP Information and coverage volumes	<div></div> Waiting period for new hires <div></div> Termination policy
LTD <div></div> <div></div> <div></div> <div></div> <div></div>	<input type="checkbox"/> Current plan year SBCs for each plan. Previous plan year SBCs or summaries cannot be used. <input type="checkbox"/> Carrier rate sheet for each enrollment tier for plan and/or highlight rates within renewal packets. <input type="checkbox"/> Most recent invoice	Effective Date <div></div> Renewal Date <div></div> Rate Type <input type="checkbox"/> Age-banded <input type="checkbox"/> Fixed rate per \$100
Number of plans:	<input type="checkbox"/> Enrollment Census including EE/DEP Information and coverage volumes	<div></div> Waiting period for new hires <div></div> Termination policy

- **How does the company contribute towards Medical premiums for employees and dependents?**

A few common contribution strategies are:

- 50% for employees and 0% for dependents
- 75% of base plan for employees and 25% of base plan for dependents
- \$450 for employee and dependent coverage

- **How does the company contribute towards employee and dependent premiums for Dental and/or Vision?**

- **Plan Bundling - does enrolling in any plan automatically enroll the insured in another plan?**

The most commonly bundled lines of coverage are Medical + Dental + Life.

- **Are life, short term, and/or long term disability plans basic (100% paid for by the company) or voluntary (100% paid for by the employee)**