

# Broker Insights

## HR Roadmap

### Using Broker Briefcase® Benefits to Support Human Resources

Human resources is a complex area that may be difficult for your clients to navigate. Support their needs and help them maintain a positive work environment by offering them resources from Broker Briefcase Benefits, which are highlighted in this roadmap.



## Market What You Can Do

The following services snapshots and services portfolios can be used to promote your human resources offerings to prospective clients and current customers:

- *Human Resources Services Snapshot & Portfolio*
- *Employee Communications Services Snapshot & Portfolio*
- *Legal Compliance Services Snapshot & Portfolio*
- *Enrollment Services Snapshot & Portfolio*
- *Health Care Reform Services Snapshot & Portfolio*
- *Workplace Wellness Services Snapshot & Portfolio*

## HR Education for Your Clients

Human resources can be a difficult department to work in because HR professionals need to stay up to date on complex, sensitive topics. Help your clients' HR departments understand the issues facing them today and stay informed with the *HR Insights* series, which is full of information on employee benefits, health and wellness, employment law, compensation, discrimination, performance management, legal compliance and many other topics. Below are just a few of the topics featured in the *HR Insights* series:



- *Recruiting and Retaining Talented Employees*
- *Avoid 10 Common ADA Mistakes*
- *Confidentiality Agreements*
- *Creating a Dress Code Policy*
- *Common and Costly Employee Benefits & HR Mistakes*
- *HR Audits*
- *Employer Information Report (EEO-1)*
- *Fair Labor Standards Act Reference Guide*
- *Helping Employees be Smart with their Money*
- *Hire to Fit Your Company Culture*
- *Inside the Role of an HR Professional*
- *Labor Unions: What You Need to Know*
- *EEOC Investigations – What Employers Need to Know*
- *6 Tips for Overcoming Negativity in the Workplace*
- *Sexual Harassment*
- *Team-building Activities*
- *Unemployment Insurance*

## HR Q&As

The human resources department is expected to have all the answers. Offer the *HR Q&A* series to give your clients access to the information they need on a wide variety of topics, including legal compliance, recruiting and hiring, employee benefits, and employment practices.

### Legal Compliance

- *Conduct Discrimination*
- *I-9 Forms for Seasonal Employees and Rehires*
- *State and Federal Labor Laws*

### Recruiting and Hiring

- *Background Checks*
- *Employment-at-will Restrictions*
- *Interview Questions to Avoid*

### Employee Benefits

- *COBRA Eligibility*
- *Long-term Disability*
- *FMLA Notice Requirements*

### Employment Practices

- *Email Communication Privacy*
- *Job Descriptions*
- *Return from Workers' Compensation*



## Legislative Compliance

Help your clients' HR professionals stay up to date on laws and regulations. Provide the materials they need to comply with health care reform, COBRA, FMLA, HIPAA and the ADA. Broker Briefcase is full of sample forms, informative articles and Legislative Briefs, as well as information about health care reform and state-specific employment law. For a more comprehensive list of compliance resources available to your clients, take a look at the *Compliance Roadmap*.

### Health Care Reform

- *Affordable Care Act Toolkits*
- *Health Care Reform Timeline Chart*
- *Health Care Reform: 2016 Compliance Checklist*
- *Health Care Reform Large Employer Calculator*
- *Health Care Reform Full-time Employee Tracker*
- *Section 6055 and 6056 Reporting Workbooks*
- *Health Care Reform Pay or Play Calculator*
- *Affordable Care Act – Cadillac Tax Calculator*

### Other Employment Laws

- *FMLA Guidelines (by state)*
- *COBRA Administration Flow Chart*
- *Top 10 COBRA Mistakes (and How to Avoid Them)*
- *HIPAA Portability Rules*
- *HIPAA Wellness Program Nondiscrimination Rules*
- *Medicare Part D Common Questions (Administration, Definitions, Notification Requirements)*
- *Americans With Disabilities Act: Questions and Answers*
- *Basics of ERISA Welfare Benefit Plans*

## Hiring and Performance Management

Hiring qualified staff and subsequently managing that talent can be difficult, especially when it comes to behavior or work performance issues. If your client's HR department is struggling to hire top-notch candidates or manage its current employees, these resources can help.

### Hiring Process

- *HR Toolkit - Interviewing*
- *Interviews: What's Illegal to Ask?*
- *Hiring Process*
- *Hire to Fit Your Company Culture*

### Performance Management

- *Communicating Terminations Effectively*
- *Creating and Maintaining Employee Personnel Files*
- *Dealing With a Passive-aggressive Employee*
- *Developing a Training Program*
- *Disciplinary Techniques for Supervisors*
- *Layoffs: A Proactive Approach*
- *Motivating Employees*
- *Performance Evaluations: Best Practices*
- *Progressive Discipline*
- *Results-only Work Environments*

### Forms

- *360-degree Review Form*
- *Corrective Action Form*
- *Notice of Unsatisfactory Performance*
- *Performance Appraisal Form*
- *Sexual Harassment Reporting Form*
- *Vacation Request Form*



## Employee Handbook

HR professionals are generally responsible for writing and updating their employee handbooks, which can be a difficult and time-consuming task. Broker Briefcase contains a complete handbook with over 60 sample policies and related forms, including the ones listed below, which you can use to help clients revamp their handbooks:

- *Employee Handbook With Linked Table of Contents and Appendix*
- *Confidential Information and Company Property*
- *Contagious Illness Policy*
- *Drug-free Workplace Policy*
- *Emergency Action Plan*
- *Equal Employment Opportunity*
- *I-9 Immigration Reform Policy*
- *Lunch and Rest Periods Policy*
- *Online Social Networking Policy*
- *Performance Evaluation Policy*
- *Standards of Conduct Policy*

- *Paid Time Off Policy*
- *Attendance and Standard Working Hours Policy*
- *Receipt of Company Handbook*
- *Expense Report Form*
- *Employee's Request to Take Voting Leave Form*

## Benefits Education and Communication

One of the most important jobs for an HR professional is to communicate benefits effectively with employees. Provide HR professionals with the *Benefits Insights* series, a reliable resource for all types of benefits-related topics and issues. Help employees understand their health benefits, finances and retirement with the *Know Your Benefits* and *Savings Fitness* series. Below are just a few of the articles available to your clients and their employees:

### Employee Education

- *Answers to the Most Frequently Asked Benefit Questions*
- *The Importance of Preventive Care*
- *25 Ways to Reduce Your Health Care Costs*
- *How to Read Your Medical Bill*
- *Flexible Spending Account (FSA) Eligible Expenses*
- *HSA Pros and Cons*
- *Is a CDHP Right for You?*
- *Open Enrollment Tips*
- *Short-term Disability Insurance*
- *Why Are Health Care Costs Rising?*
- *Employee's Guide to Understanding the Roth 401(k)*
- *Avoid Debt and Credit Problems*
- *Borrowing From Your 401(k)*
- *Coping With Financial Crises*
- *Top 10 Ways to Prepare for Retirement*



### Employer Education

- *401(k) Plans for Small Businesses*
- *Benefit Plans: Tax Considerations*
- *What Happens if an Employee Misses Open Enrollment?*
- *Chronic Conditions*
- *Communicating Benefits Cuts to Employees*
- *Dependent Eligibility Audits*
- *Educating Employees About Health Benefits*
- *Form 5500 Annual Return/Report of Employee Benefit Plan*
- *Fringe Benefits*
- *Group-term Life Insurance*
- *Mental Health Benefits*
- *Nondiscrimination Rules for Benefit Plans*
- *Preventive Care*
- *Qualified Sick Pay Plans*
- *Transitioning to a Consumerism Model*
- *Strategic Benefit Planning*
- *What Is Managed Care?*



## Promotional Materials

- *Reduce Stress Poster*
- *Bike to Work Poster*
- *Flu Shots Poster*
- *Benefit Plans Email/Poster*
- *Health Benefits Email/Poster*
- *Understanding Health Benefits Email/Poster*

## Benefits Statements

Employees are often unaware that their total benefits packages are more than just their paychecks. Help HR professionals educate employees and increase employee appreciation with customizable benefits statements showing total compensation benefits.

- *Benefits Statement Cover Letter*
- *Employee Benefits Statement*
- *Employee Benefits Statement With Statutory Benefits*
- *Employee Benefits Statement With Paid Time Off*
- *Employee Benefits Statement Content Checklist*
- *Employee Benefits Statement, Completed Sample*

## Benefits Enrollment

Employers can be overwhelmed by the administrative burden associated with open enrollment, and employees are often confused by the complexity of various benefits offerings. Support your clients by offering tools like educational materials, communications and forms to help streamline enrollment. Check out the *Open Enrollment Roadmap* to learn which resources are available to help your clients through every step of the open enrollment process, including the following:

- *Open Enrollment Overview and Summary*
- *Open Enrollment Glossary of Terms*
- *Annual Open Enrollment – Checklist*
- *Open Enrollment Tips*

## Benchmarking Resources

Employers need access to benchmarking data to help them stay competitive and make efficient decisions. Provide your clients with the following resources to help them see how their benefits programs compare:

### Employee Benefits Benchmarking

- *2014 Health Plan Design Benchmark Summary*
- *Online Health Plan Design Benchmarking Tool* – This online tool is based on data from nearly 31,000 employers and 50,000 plans and allows users to analyze data so employers can compare their health plans against similar organizations within the same region, industry, group size and plan type. Access this tool from the Broker Briefcase home page.

## Other Benchmarking Resources

- *2015 Survey Results: Broker Services*
- *2015 Survey Results: Paid Time Off Benefits*
- *2014 Survey Results: Affordable Care Act*
- *2014 Survey Results: Wellness Benefits*
- *Towers Watson 2014 Health Care Cost Survey*
- *Employer Health Benefits 2014 Annual Survey*

## Social Media

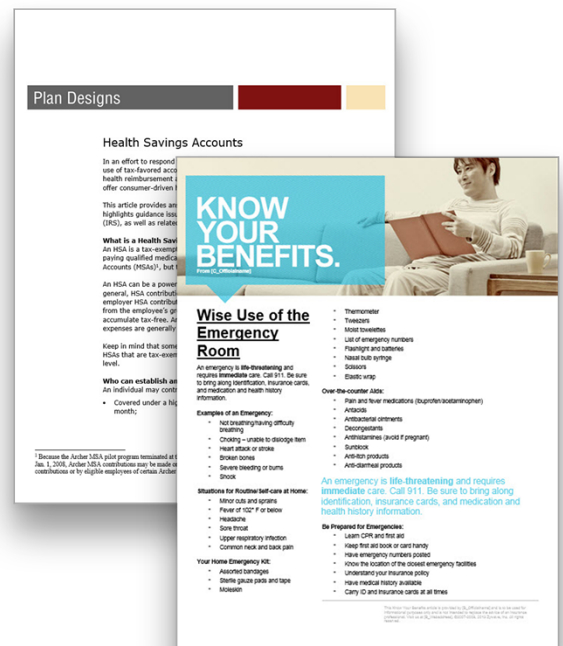
As social media continues to become an important part of employees' and customers' daily lives, it is important for clients to harness the power of social media. Share the resources in Broker Briefcase, including the *Succeed With Social Media* series, to help HR professionals improve corporate and benefits communications, connect with employees in a new and powerful way and recruit new talent.

- *Succeed With Social Media – an Essential Guide for Employers*
- *Developing a Social Media Plan*
- *Recruiting With Social Media*
- *Legal Considerations With Social Media*
- *Social Media Security*
- *Social Media – Measuring ROI*

## Managing Health Care Costs

Provide your clients and their HR professionals with strategies to help manage increasing health care costs. With the *Plan Design* series, clients can learn about different plan options and how to successfully implement them. Help them promote consumerism among their employees with the *Know Your Benefits* series. Give your clients information about voluntary benefits they can offer to help reduce costs, and provide ways for them to solicit employee feedback. Use the resources in Broker Briefcase, including the ones listed below, to get started.

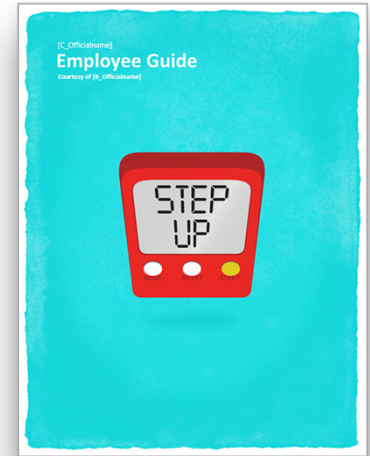
- *Employee Benefits Survey*
- *Disease Management Programs*
- *Health Savings Accounts*
- *Prescription Benefit Carve-out*
- *Value-based Insurance Design*
- *Voluntary Benefits*
- *What Is a Wellness Program?*
- *Understanding a Health Reimbursement Arrangement (HRA)*
- *Wise Use of Medications Handout/Presentation*
- *Wise Use of Emergency Room Handout/Presentation*
- *Knowing Where to Go – Choosing the Right Health Care Provider Video*



## Health and Wellness

One way for your clients to save on health care costs and to promote employee well-being is to implement wellness programs and education. Broker Briefcase contains the tools employers need to create and implement effective workplace wellness programs, along with the promotional materials to support these programs, including:

- *Workplace Wellness Roadmap*
- *Weight-loss Winner: Employer and Employee Guides*
- *Step Up: Employer and Employee Guides*
- *Kickin' Butts: Employer and Employee Guides*
- *Workplace Wellness series*
- *Live Well, Work Well series*



## For Fast and Easy Client Contact, Send Campaigns

Short on time? In 10 minutes or less you can support your clients' human resources needs by using one of the existing campaigns or groupings:

- Employee Handbook Grouping
- Harassment Resources
- HR Insights Monthly Campaign
- Human Resources (HR) Compliance Grouping
- Human Resources (HR) Hiring Grouping

To subscribe, hover over the grouping, choose Post or Email, select your client(s), customize as needed and designate periodic distribution dates.