

ADRS PRE-ENROLLMENT CHECKLIST

- 1) Exact location of meeting \_\_\_\_\_
- 2) Best time for meeting \_\_\_\_\_
- 3) Size of group \_\_\_\_\_
- 4) Type of group (employees, management, etc.) \_\_\_\_\_
- 5) Will there be potential for interruptions or noise concerns? YES\_\_\_ NO\_\_\_
- 6) Type of room to be used (classroom, conference room, warehouse, etc.) \_\_\_\_\_
- 7) Will refreshments need to be brought in? YES\_\_\_\_\_ NO\_\_\_\_\_   
If the answer is YES, confirm the number attending 24 hours in advance.
- 8) Are there any hearing impaired or disabled persons in your group? If so, how many? \_\_\_\_\_
- 9) Is there any specific information about the group of which the enroller should be made aware? \_\_\_\_\_
- 10) What is the name of the payroll representative and is he/she aware of this new benefit? \_\_\_\_\_ YES\_\_\_\_\_ No\_\_\_\_\_
- 11) How many pay periods are the employees paid? 12\_\_\_ 24\_\_\_ 26\_\_\_ 52\_\_\_
- 12) Are all the employees paid with the same number of pay periods (i.e. are hourly employees paid weekly, salaried employees paid monthly, etc)? Yes\_\_ No\_\_\_
- 13) Are benefits deducted from each paycheck? Yes\_\_\_\_\_ No\_\_\_\_\_
- 14) Are all attendees at the meeting fulltime payroll-deducted employees?   
Yes\_\_\_\_\_ No\_\_\_\_\_
- 15) If not, are some employees part-time and eligible for benefits? Yes\_\_\_ No\_\_\_
- 16) Are any employees present in the meeting non-employees, such as independent contractors, yet eligible for benefits? Yes\_\_\_\_\_ No\_\_\_\_\_
- 17) Have arrangements been made by the pre-enroller to have the blue card signed by the company's authorizing officer? Yes\_\_\_\_\_ No\_\_\_\_\_

- 18) Has the Business Owners Legal Solution Plan been offered to the business owner for companies of less than 100 employees? Yes\_\_\_\_\_ No\_\_\_\_\_
- 19) Arrange a discussion with the payroll representative of his/her importance to the employees' usage of the benefits. Explain the call from Group Marketing 1-2 days after the initial enrollment requiring 1) verification that the enrollment actually took place, and 2) that the Pre-Paid Legal sales associate left the payroll slips with the payroll representative. Remind the payroll representative that the group will be invoiced in arrears for a full month's billing cycle. Provide a copy of the Group Benefits Handbook (#51417) and communicate that he/she may need to contact Group Billing if the employees were not deducted a full month's pay during the first billing cycle.
- 20) Have arrangements been made if appropriate to meet with department managers, supervisors, school principals, etc. prior to rolling out the new benefits? Yes\_\_\_\_ No\_\_\_\_\_
- 21) Will the authorizing officer, CEO, President, and/or Decision-Maker, etc. be present to kickoff the meeting? Yes\_\_\_\_\_ No\_\_\_\_\_
- 22) Has the introduction of the group benefits specialist for the client to use at the beginning of the enrollment to begin the ADRS employee presentation been shared with the decision-maker? Yes\_\_ No\_\_
- 23) Has that individual read the prepared introduction and is he/she comfortable with beginning the meeting with the right tone and right spirit? Yes\_\_ No\_\_
- 24) Has the pre-enroller presented the enrollment forms so that the decision-maker/client understands what will be presented to the employees (i.e. the sensitive and non-public security policy, confidentiality form, etc.)? Does the client have any concerns? Should any item be emphasized or eliminated? Yes\_\_\_\_\_ No\_\_\_\_\_
- 25) Confirm with the decision-maker the desired length of the meeting to be 60-75 minutes but could run less with a minimum of questions. Explain the 2-part nature of the meeting including Part 1 consisting of the Identity Theft Risk Management Workshop and Part 2 consisting of the Voluntary Benefits.
- 26) Have arrangements been made to ensure that the company has appointed the Information Security Officer? That person is\_\_\_\_\_.
- 27) Reconfirm the number of attendees at the enrollment presentation and the necessity of ALL employees to be in attendance. If a sudden drop in attendance is forecast, discuss rescheduling to an alternate date.