

Discovery record/Finding the solution



<p>Name of company:</p> <p>Address:</p> <p>Phone number:</p> <p>Type of business:</p> <p>Decision maker(s) and title(s):</p> <p>Contact person(s) and title(s):</p>	
<p>How many employees do you have?</p> <p>Full-time _____ Part-time _____ 1099 _____</p>	<p>Tell me what a typical day is like for your company.</p>
<p>Do you currently offer medical insurance?</p> <p>Carrier:</p> <p>Broker:</p>	
<p>What portion of premium do the employees pay?</p> <p>Employee coverage _____% Family coverage _____%</p> <p>Major medical plan: Deductible \$_____ Co-pay \$_____</p>	<p>Tell me about the demographics of your workforce (age, family status, gender).</p>
<p>Do you use Section 125 of the IRS Code for these services?</p> <p>Premium Only Plan (POP) _____</p> <p>Dependent Care Reimbursement Account _____</p> <p>Medical Reimbursement Account _____</p>	
<p>Do you offer other programs such as:</p> <p>Short-term disability _____ Long-term disability _____</p> <p>Vacation and/or sick leave _____</p> <p>Life insurance _____ Dental _____</p> <p>Retirement benefits 401(k) _____ Match _____ Vesting _____</p> <p>Wellness programs _____</p>	<p>Notes</p>
<p>Do you feel your employees understand and appreciate their benefits?</p> <p>If you could add one benefit to your current package without additional cost, what would it be?</p> <p>How are benefit decisions made in your company?</p> <p>How are annual enrollments currently being communicated to your employees?</p>	