

Item	Specifics	File format	Lead
Ancillary Benefits	<ol style="list-style-type: none"> 1. Ancillary benefits offered 2. Which benefits are 100% ER funded? 3. Coverage level for 100% ER-funded benefits 	Complete this form	Unum
Health Plan Documents	<ol style="list-style-type: none"> 1. Schedule of Benefits/ Summary Plan Descriptions 2. Summary of Benefits and Coverage 3. Formularies (including HSA/ACA preventive drug lists, if applicable) 	<p>Any format.</p> <p>Typically, brokers send us exactly what the carrier has shared with them.</p>	Broker/ Consultant
Benefit Guide	Employee Benefit Guide for the plan year	Standard PDF	Broker/ Consultant
Contribution Strategy	<ol style="list-style-type: none"> 1. Gross Premiums 2. EE/ER payroll deductions 3. HSA/HRA/FSA Details 	Excel Preferred, standard PDF accepted	Broker/ Consultant
Eligibility File	Template is filled out with necessary fields. Instructions provided in template.	Download template here	Employer

What's next? Our team will email you to schedule a 45-minute kick off call. We'll then create a custom communications package for sharing Decision Doc with employees.

Decision Doc, powered by Sherpa Score, is a joint solution offered by MyHealthMath, Inc. and Sherpa



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