Stewardship Report

Presented to:

***Broker Logo Here***

December 1, 2013

Our Goal is to Help

*Broker Name*

Close more business \* Retain clients \* Build agency Brand

**Your ThinkHR Team:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer Success**  Tech Support, Communication Materials, Account Questions, Reports  [Customersuccess@thinkhr.com](mailto:Customersuccess@thinkhr.com) (925) 225-1100 ext. 215 | **Sales**  Executive, Contract, Contracts, Problems/Praises  Joy Justus  [jjustus@thinkhr.com](mailto:jjustus@thinkhr.com)  (925) 225-1100 ext. 247 | **Billing**  Invoices  [billing@thinkhr.com](mailto:billing@thinkhr.com)  (925) 225-1100 | **Hotline**  (877) 225-1101 |

**Broker Partner Contacts:**

|  |  |  |
| --- | --- | --- |
| **Executive**  Contact Name | **Administration**  Contact Name | **Portal Access**  <http://brokername.thinkhrlive.com> |



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| --- | --- | --- |
| **Broker Name** | **Broker Partner** | |
| Contract Effective Date | March 1, 2012 | |
| Contract Renewal Date | March 1, 2014 | |
|  |  | |
| **Reporting Period** | **December 1, 2012 - December 1, 2013** | |
| Clients Contracted | 100 |
| Active Clients | 69 |
| Active Users | 138 |
| Current Monthly Fee |  |
| Renewal Fee |  |

*ThinkHR is a comprehensive, turn-key HR compliance resource that includes many valuable features to keep your clients out of the “penalty box.”  We also serve as a valuable resource to agencies and the support that ThinkHR provides to agency staff can reduce workloads and improve accuracy and efficiency for our broker partners.  Below is a summary of the services and resources included in your monthly fees:*

* Experienced HR Advisors with SPHR/PHR designations standing by the phone ready to answer calls “Live” 11 hours every business day
* Daily monitoring of legislative updates on a state and federal level
* Alerts notifying you and your clients about state and federal level employment law changes and updates
* Maintenance of 5,000+ document resource Library with tools, checklists, and resources
* Development and maintenance of technology allowing an easy-to-use user interface between our partners and their clients
* Dashboard allowing usage information and client enrollment/updates
* Maintenance of a branded service platform with our partners name/logo
* Development and design of over 200+ web training courses, including many state mandated materials
* Over 6 HRCI approved and accredited “Live” interactive webinars every year
* Authoring of more than 12 original whitepapers and resources every year including ACA Checklists, Benefits Notice Calendars, Social Media Policy, FMLA Best Practices – and more!
* Attorneys who review and approve the accuracy of ThinkHR resource materials
* Creation of HR Newsletters sent every other week to keep clients informed and updated on important HR news and topic

**Usage Summary**

|  |  |
| --- | --- |
| Web Customer Usage | 524 inquiries |
| Live HR Consultations | 103 |
| Total Training Courses Taken | 75 (53 hours) |
| HRCI Webinar Attendees | 12 (20 hours) |
| Branded email communications (HR Alerts & Newsletters) | Total Sent: 6,000  Total Read: 3,000 |
| Broker Tool Kit Resources Provided | Benefits Notice Calendar: 7/2013  Notice Of Coverage: 9/2013  ACA Checklist: 10/2013  Federal HR Compliance Chart: 11/2013  2014 State & Federal Minimum Wages: 12/2013 |

**Summary of Client Usage**

**Summary of Client Usage (continued)**

**Summary of Broker Usage**

**\*Benchmarked normal internal usage is 40/60\***

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| --- | --- | --- | --- | --- |
| **Client Name** | **Contact Name** | **Issue Date** | **Issue** | **Category** |
| Company | Company Contact | 27-Nov-13 | Under Section 125, and a Flex Plan for premium and out of pocket pretax reimbursement, would the following allow for an off anniversary change due to a family status change:1.Change in premiums for employee of family coverage under a dental and/or medical plan.2.A change in plan design. Specifically, if we were to move from a self-funded dental plan that has a 7/1 to 7/1 deductible accumulation period, and change to a calendar deductible accumulation period – would this constitute a family status change, and allow for a change in the pre-tax contributions to the flex plan for out of pocket expenses. | Employee Benefits |
| Company | Company Contact | 4-Nov-13 | I have a salaried employee who acts as our local community liaison - the face of our company to the community. I recently learned she performs in a burlesque show showing everything but pasties. She also has an online presence on FB and twitter with photos of her performing. I'm worried about how this reflects on our company. As far as I know, our CEO has no idea - but wants to know how to handle this situation. | Employee Management |
| Company | Company Contact | 3-Oct-13 | As part of the new hire paperwork, can an employer request signed authorization to obtain a consumer credit report to be obtained at any time during employment? | Recruiting and Hiring |
| Company | Company Contact | 5-Sep-13 | My inquiry is with regards to the Notification of the Exchanges and distribution of the DOL's Exchange forms. We have a client that offers a health plan to management only. Would we therefore advise them to send the DOL form a health plan to those eligible for the health plan and send separately the DOL form stating no coverage is offered to those NOT eligible? Also, since this must be presented to all employees, part-time or full-time, how do we distinguish which form to send to those who are not eligible? | Compliance |
| Company | Company Contact | 17-Jul-13 | Would a Cancer plan on a group chassis through for example Allstate or Colonial have to be included in COBRA elections? My understanding is that they could choose to offer through COBRA but are not required to.- This policy is convertible, EE can convert to an individual product upon termination- There is no contribution by the employer to the premium- This client is a church plan, so they do not file 5500's | Compliance |
| Company | Company Contact | 14-May-13 | We would like to set up a paid leave of absence policy based on years of service. Employees could accrue1 week for each year worked up to 13 weeks. The reasons for taking leave would mimic those of FMLA. Therefore, this is designated FMLA also assuming the employee has met the requirements. If the employee has paid vacation or sick time available already they would take that concurrently with the LOA and FMLA. In the event that the employee's own disability is involved, the employer would subsidize that compensation to make it whole. Does this sound feasible? Legal? | Leaves of Absence |
| Company | Company Contact | 8-May-13 | We have an employer that needs to garnish wages and the employee has premium deducted from their paycheck for the group medical plan. If the garnishments bring their take home pay close to $0, where can the medical premium fall in the deductions? Can the employer take it out before garnishments? | Compensation |
| Company | Company Contact | 25-Mar-13 | We are terminating an EE. Do we have a sample template we can use to communicate to the EE benefits will end and may elect continuation under state continuation? | Terminations |
| Company | Company Contact | 27-Dec-12 | I have a client interested in moving up their medical renewal from 4/1 to 3/1 because the renewal coincides with their fiscal year end. My question is whether the 60 day rule notification regarding SBCs is impacted by such a decision. The client wants to market the plan and if the results are favorable, there is a strong indication the client would move carriers. | Employee Benefits |