

# Communicating & Enrolling

Employee Benefits



Worksite Communications  
ARTHUR J. GALLAGHER & CO.

## Your Enroller of Choice

Worksite Communications is the largest and most experienced employee benefits education and enrollment firm, specializing in serving public sector employers and union organizations. Our independence from insurance and investment providers gives us the distinct advantage of focusing on our primary interest – serving the needs of the employees we educate and enroll.

**Worksite Communications is a leader in setting the performance standards of our industry.**

- Since 1996, Worksite Communications conducted more than 1,000 education and enrollment campaigns for public and private employers – enrolling more than three million eligible employees.
- Our employer client relationships have stood the test of time with most of our employer clients retaining our services long-term.
- The meetings we conduct feature a wide variety of employee benefit programs, including: Core and Supplemental Medical, Critical Illness, Universal Life, Long-Term Care, Dental, Vision, Disability, Group Term Life and 401(k).
- We continue our enrollment innovation with new training methods and a Quality Service Program (QSP) to improve staff performance and established a study group with other firms to explore ways to improve industry performance.





# Operational Assets

We've got the technological expertise and operational assets to implement your next enrollment with ease. Our systems and protocols are time-tested and a proven means of capturing, organizing and processing enrollment data needed to service your employees.

## **Enrollment Database System**

Integrated record keeping software defining each Benefit Representative's licensing, production, language and experience data. System allows management reporting and scheduling.

## **Web-based Data Collection and Reporting System**

Uploads and reports daily production by Benefit Representatives and sorts data for multiple reports. Customized interface incorporates required functionality (DVA, Digital Record keeping) through a laptop-based Daily Log interface.

## **On-line Schedule Management System**

Customized client scheduling, provides Employee selection of date, time, and location. A customized landing page with product pre-education is provided. The call center can schedule and support for employees without web capabilities.

## **Dependent Verification Audit System**

Integrated with the Web Data Collection process. Software downloads dependent data to laptops. The system provides requirements for dependent verification to Benefit Representative and provides integrated form scanning. Customized client reporting of verification outcomes.

## **Benefit Statement Production**

Worksite Communications offers a variety of benefit statements including the customized traditional benefit statement or our trademarked Optimal Comp™ Statement. The Optimal Comp™ Statement delivers a wellness theme and defines the healthcare impact on employee compensation.

## **Implementation Protocols**

A project scope document defining case deliverables and client expectations Is provided for every case. We utilize a web-based project management tool that serves as a centralized location for team members to obtain up to the minute information on the project. Our experienced implementation coordinators have a combined 15 years of experience.

## **Call Center Service**

The Worksite Communications call center was established for outbound, scheduled, enrollment calls to accommodate remote employees. The call center is managed by a full time supervisor. Our call center is IP Phone based for easy expansion and low cost. We use updated Altigen servers with backup. All enrollment calls are recorded for signature.

## **Field Management Capacity**

Worksite Communications has large case experience and multi-case operations without geographic limitations. We have relationships with the very best field enrollment managers and supervisors in the industry. Our management team is highly experienced with our six senior managers having a combined 50 years of enrollment management experience.

## **Training and Quality Control**

Worksite Communications utilizes an Interactive Reality-Based Training (IRBT) teaching approach that is modeled after training methods used in Florida law enforcement agencies. These methods ensure that our staff passes capability tests prior to conducting any field activity. We conduct a systematic evaluation of all employee meetings and a thorough evaluation of all cases and projects.

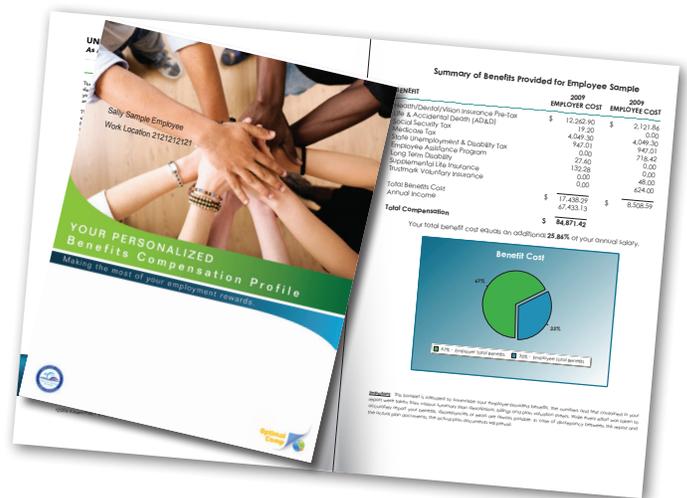
# Value-Added Services

We have implemented hundreds of programs for a variety of benefit-related services, including: dependent verification, core and voluntary benefit enrollments, employee benefit statements and wellness programming.

**We create custom Benefit Statements that graphically display how benefits increase the value of an employee's overall compensation.**

## OPTIMAL COMP™

Our trademarked Optimal Comp™ Statement increases employee understanding of how healthcare costs can impact overall compensation and how they can help contain costs by using healthcare wisely.



## WELLNESS ENGAGEMENT

Our proprietary WellEngaged® program introduces simple steps all employees can take to improve their health. The system integrates and reinforces the employer's existing wellness programs and provides meaningful engagement and tracking of employee health improvement steps.



**Worksite Communications has developed a secure, software program to capture dependent information and reports that are compatible with most payroll systems.**

A growing number of employers are conducting audits to remove ineligible dependents from their healthcare plans. In an effort to contain escalating healthcare premium costs, many employers are conducting Dependent Verification Audits to assure they pay premiums and cover only those who are actually eligible for coverage.

## DEPENDENT VERIFICATION OUR SERVICES

We provide the following processes:

- A customized implementation process for each client
- Assists with drafting and distribution of communications
- Complete eligibility verification of all enrolled dependents

## NEW! In- House Counselor Enrollment Service

Worksite Communications now provides employers with continual service by providing an in-house benefits counselor working full time to deliver employee benefits education and enrollment services to employees. To receive this service the employer provides a suitable work space for the in-house counselor and helps to facilitate education and enrollment sessions between the counselor and employees on an on-going basis. We work with you to determine which of the following methods (or a combination of them) works best for the employer.



The in-house counselor would educate and enroll all newly hired employees and assist them in understanding and completing enrollments for core and voluntary benefits by:

- Providing an overview and description of all core benefits
- Introducing the new hire to the on-line and self-serve enrollment tools
- Assisting the employee in completing their initial benefits enrollment and dependent verification
- Explaining and enrolling voluntary benefits

In addition to the new hire service the counselor would provide on-going service to existing employees by meeting with each employee at least once annually to review their benefits, enroll in voluntary benefits, and to otherwise

update the employee on selected topics defined by the employer. These on-going benefit education topics can include a broad range of HR and compensation related issues. The scope of these one to one annual meetings could include some or all of the following:

- Updating employee demographic information
- Conducting dependent audit for each employee's dependents
- Provide and review an employee compensation statement

The in-house counselor would also be trained to assist the employer with administrative tasks related to the voluntary benefits program. This would include data entry or changes to payroll, reviewing carrier billings, conducting monthly calls with carriers to assure smooth on-going administration, and assisting with claims related issues as needed.

## Enrollment Methods

Whether for voluntary benefits, core benefits or re-enrollment efforts, Worksite Communications helps companies achieve fast, effective and accurate implementation. We work with you to determine which of the following methods (or a combination of them) works best for the employer.

### ONE-ON-ONE SESSIONS

An enrollment counselor meets with each employee to explain the coverage choices and addresses any questions, then enters the selections into an electronic enrollment system.

### ASSISTED WEB ENROLLMENT

Using this method, an enrollment counselor walks individuals through the employer's online enrollment site. The counselor explains all of the benefit choices, answers any questions and assists with the enrollment process.

### CALL CENTER ENROLLMENT

Much like a one-on-one meeting, employees call a toll-free number to speak with their enrollment counselor. (The employee does not have to key in numbers on the telephone key pad.)

### GROUP MEETINGS

Leading a group of 15-40 employees, an enrollment counselor presents an explanation of the benefit choices and answers questions. Once individual preferences are confirmed, the counselor enrolls the employee electronically.



# Exceptional People

We hire professional benefit counselors who educate and enroll employee benefits as their primary profession. Our enrollment staff are salaried, independent contractors, not paid on a commission basis. Worksite Communications maintains a sophisticated database of enrollment personnel. We believe it is the largest and most complete in the industry, including more than 1,000 enrollment professionals.



**JOSEPH P. GAUDINO, AREA PRESIDENT AND CO-FOUNDER**

Joe is founder of the company and is responsible for the day-to-day operations. As Area President, he contributes 100 percent of his time to the company. He has been in the benefits enrollment business since 1984.



**RIC DISTEFANO, AREA VICE PRESIDENT FIELD OPERATIONS**

Ric is responsible for overseeing and managing of the day to day field operations activity for all enrollments and directly manages his supervisory and Benefit Counselor teams. Ric manages enrollments for clients in various industries from school districts, hospitals, state, municipality employees and the private sector.



**CATHY FREESMEIER, AREA VICE-PRESIDENT OF ADMINISTRATIVE SERVICES**

Cathy is responsible for the administrative operations for the Tallahassee Branch home office, as well as the maintenance and operation of our enrollment implementation systems. Cathy has worked in the employee benefits field for more than 20 years.



**LORRAINE SHERIDAN, DIRECTOR, MARKETING & ENGAGEMENT**

With over 25 years' experience in Insurance Brokerage and Employee Benefits Consulting, Lorraine is responsible for marketing initiatives and management of recruiting and retention for field and home office enrollment center Benefit Counselors.



**DIANA MATHESON, NATIONAL IMPLEMENTATION MANAGER**

Diana is in charge of the national coordination and implementation of cases. Diana has been in the employee benefits business for more than 17 years.



**DEREK ALLEN, SENIOR WEB DEVELOPER**

Derek programs the web applications that drive our enrollments. His additional responsibilities include systems management, data analysis, and technical support.



**MARIA HINSON, NATIONAL IMPLEMENTATION MANAGER**

With Worksite Communications since 2001, Maria is responsible for coordinating the enrollment implementation process for Worksite's clients. She effectively leads the project planning process to ensure that assigned tasks are completed in a timely matter for a successful case launch.



**TARA SCHULTZ, SENIOR RECRUITER**

Tara is responsible for screening and selecting the most qualified Benefit Counselors who meet the company's high standards for professionalism and industry knowledge. She began working with the company in 2009 as a Benefits Counselor and was quickly promoted to Supervisor and Case Management positions. She is an FSU graduate with a double major in Finance and Real Estate.



**ANNE ARBOGAST, TRAINING AND QUALITY ASSURANCE SPECIALIST**

Anne has been with Worksite Communications since 2008 and brings more than 25 years of human resource and benefits experience to her position as Training and Quality Assurance Specialist.



**AUSTIN WEAVER, BUSINESS DEVELOPMENT SPECIALIST**

Austin serves as our day-to-day contact for brokers across the country. He is responsible for helping on-board new cases along with educating others about our services and commitment to quality.

## RECENT CASES

The following is a partial list of cases enrolled by Worksite Communications in the last two years:

JACKSON HEALTH SYSTEM HOSPITAL 8,800 employees	YMCA, CHICAGO, ILLINOIS 1,400 Employees
TORRANCE HOSPITAL OF LOS ANGELES 2,200 employees	MIAMI-DADE COUNTY PUBLIC SCHOOLS 37,500 employees
STATE OF MICHIGAN 52,000 employees	PRIME HOSPITAL 7,500 Employees
OFFICE DEPOT 19,000 employees	VALLEY HEALTH HOSPITAL 3,200 Employees
UTI CORPORATION 4,100 employees	PSA HEALTHCARE 5,900 Employees
ST. LUCIE COUNTY SCHOOLS 6,000 employees	CITY OF SAVANNAH 2,500 Employees
PALM BEACH COUNTY SCHOOLS 22,000 employees	CHARLOTTE SCHOOL DISTRICT 16,000 Employees
DUVAL COUNTY PUBLIC SCHOOLS 12,000 employees	SPARROW HOSPITAL IN MICHIGAN 5,700 Employees
ALSCO 4,000 employees	ANTELOPE VALLEY HOSPITAL 2,300 Employees
CITY OF BATTLECREEK 800 Employees	HAMPTON CITY SCHOOLS 4,300 Employees
CONTINENTAL MOTOR GROUP 600 Employees	UNIVERSITY OF FLORIDA 12,000 Employees
COMMUNITY MEMORIAL HEALTH 1,600 Employees	

## REFERENCES

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