IMPLEMENTATION CHECKLIST FOR CASE BUILDS

VELOCITY BENEFITS

Use this checklist to gather the information needed for a case build. Complete the data collection form on our website https://velocity-benefits.com/build-my-case and in 3-7 business days you will receive an invite to review the case build.

COMPANY DETAILS

- ☐ Organization structure/eligibility groups (applicable locations, divisions, and job classes)
- ☐ Company Administrator (name, phone number, and email)
- ☐ Optional: Logo and background image

BENEFIT DETAILS

- ☐ Plans offered, including exact plan names
- ☐ All plan summaries, medical SBCs, and other plan resources
- ☐ Effective Dates
- ☐ Open enrollment start and end dates
- ☐ Tax Determination (pre-tax or post-tax)
- ☐ Rates for all plan types
  - Short Term Disability – per $10 of weekly benefit
  - Long Term Disability – per $100 of monthly covered payroll
  - Life and Critical Illness – per $1,000 of benefit
- ☐ Employee or employer monthly contributions ($ or %) per member type/tier
- ☐ Employment termination rules (dates of termination or end of month)
- ☐ EOI Application or Carrier link
- ☐ Optional: Group numbers

EMPLOYEE ACCESS

- ☐ Completed employee census
- ☐ Default pay-cycle
- ☐ Optional: Login/open enrollment message
- ☐ Optional: Benefit-related video URLs