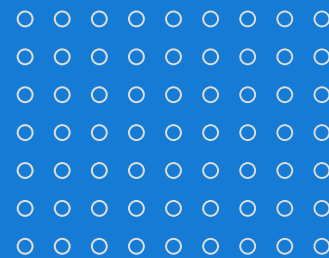


# DIY TEMPLATES

## Tip Sheet



Do it yourself (DIY)—download one of our ready-made templates and you'll be on your way! We are proud to offer an array of templates for all of your DIY needs. Below are some tips and tricks to help streamline your design when utilizing these files.

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### BENEFIT GUIDE TEMPLATES

- If a client logo is not available, you can add a text box and type the client company name in the designated logo space.
- When you are adding content, make sure your fonts are consistent (ex: Paragraphs are set to 9 pt. Arial font, tables are 8 pt. Arial font).
- Be sure your title matches your plan year (ex: If the plan year is January 1 – December 31, 2019, the title should read 2019 Benefits Guide; If the plan year is February 1, 2019 – January 31, 2020, the title should read 2019 - 2020 Benefits Guide).
- If Registered Domestic Partners (RDP) are not covered under your client's plans, remove all references in the Eligibility and Choose Carefully sections.
- If only one plan is offered in a specific section, be sure to remove the "s" from the "Plans" header and update the intro sentence below the header to, "We are proud to offer you a medical/dental **plan**."
- Be sure to clarify whether the deductible/out-of-pocket maximum apply per calendar year, or per plan year.
- Include the proper tier structure for each carrier under Prescription Drugs (ex: Tier 1 / Tier 2 / Tier 3 vs. Generic / Brand / Non-Formulary).
- If the medical or dental benefits are not subject to a deductible/don't require an asterisk, be sure to delete the footnote, "\*Benefits with an asterisk (\*) require that the deductible be met before the plan begins to pay."
- If there are no out-of-network benefits on medical/dental, remember that footnote 1 will not apply.
- If the client offers an HSA and FSA, but no Limited Purpose Health Care FSA, include a note stating HSA participants are not eligible to participate in a Health Care FSA.
- If Registered Domestic Partners (RDP) are not covered under your client's plans, be sure to remove RDP from the Supplemental Life/AD&D Benefit Option.
- If you are including rates within the guide, be sure to remove the "Cost of Benefits" paragraph.

### RATE SHEET TEMPLATE

- Be sure to include the entire plan year under the Rates title (ex: January 1 – December 31, 2019 Employee Contributions).
- If Registered Domestic Partners (RDP) are not covered under your client's plans, remove RDP from the coverage tiers and remove the RDP footnote.

