



## Benefits Administration Outsourcing Partnership Pledge

***Tell us what is important. We'll deliver or your money back.\****

We want our partnership to exceed your expectations. So we've listed the common performance measurements requested by our clients. Some of them are likely priorities for you, too. We'd like you to fill in the measurement standard that you expect in each of the categories. Then, in case we've missed any other important standards, there is room at the bottom for you to add your own standards and your expected measurement values. Once we've established our mutual expectations, we'll both sign the pledge, knowing exactly what we must do together to succeed. You will now fill in the framework of metrics with your own expectations of our performance.

### Client Partnership Pledge

Maintain average customer service wait times of \_\_\_\_ minutes.

Respond to voice mails within \_\_\_\_ business hours.

Respond to emails and faxes within \_\_\_\_ business hours.

Resolve \_\_\_\_% of customer service inquiries on the initial call.

Process electronic files within \_\_\_\_ business day(s) of receipt.

Maintain system uptime availability \_\_\_\_\_ % of the time.

All Non-customized reports sent as scheduled or on demand.

Consolidated billing sent monthly.

All Customized reports sent within \_\_\_\_ week.

Carrier Response for Error Reports completed within \_\_\_\_\_ hours.

Export data sent to carriers and client as scheduled by client; \_\_\_\_\_ per week.

Integrity of data is \_\_\_\_ accurate.

Process FSA requests for reimbursement (completely documented) within \_\_\_\_ business days of receipt.

Have DirectPay Benefits cards mailed to participants within \_\_\_\_ business days after the plan enrollments are loaded.

General Rights Notices sent to new plan members within \_\_\_\_ business days of being notified.

Specific Rights Notices sent to qualified beneficiaries within \_\_\_\_ business days of receipt.

COBRA premium payments processed and posted within \_\_\_\_ business days of receipt.

### Sample Metrics

1.5 minutes

8 business hours

8 business hours

80%

3 business days

95% of the time

1 week

72 hours

1 time/wk

99%

3 business days

10 business days

2 business days

2 business days

2 business days



What other performance standards are important to you?  
Please write in the standard and the expected measurement value.

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**We'll perform the way you expect us to or you don't pay.\***



## Benefits Administration Outsourcing Partnership Pledge

We want to do the best possible job administering your group, but we can't do it alone. That's why we ask for your help by committing to us that you will provide us with the information we need to do our best job for you. Please initial next to each item to indicate your commitment.

- Actively participate in your implementation and on-going administration including tracking progress and fulfilling requests.
- Provide employee data to Workable Solutions during implementation to assure accurate information is loaded on the system.
- Use on-demand reports from the Benefits system.
- Provide employee email addresses for automated communications.
- Encourage participants to read plan education materials and use the online participant portal to manage their coverages.
- Pledge to make all interactions with Workable Solutions courteous and professional.
- Use the online employee/employer portal.
- Upon Open Enrollment provide plan design and rates no later than 60 days before the start of the new plan.
- Report new plan members within 5 days of eligibility.

By signing below, both parties are in agreement about the terms of the partnership.

_____	Signature _____
Terry McCorvie, President	Name & Title _____
<b>Workable Solutions, Inc.</b>	Employer Name _____
Date _____	Date _____

This document should be signed by the client and faxed to 407-540-1749 at the time when the proposal is accepted. Terry McCorvie, President of WSI, will then sign the pledge and it will be faxed back to the client.

### \*Money Back Guarantee

In performance of its duties, Workable Solutions, Inc. (WSI) will adhere to the performance standards set forth above. All standards are based on performance averages as measured within a calendar month period. Should Client believe WSI is out of compliance with any standards, written notice detailing such non-compliance will be provided to WSI. There shall be a 30 day period following the date of receipt of the notice during which WSI may either demonstrate the standard is in compliance or endeavor to correct the area(s) of non-compliance. Should WSI remain out of compliance at the end of the 30 day period for corrective action, monthly fees for the non-compliant product(s) shall be waived until such time as the performance standard is brought into compliance. WSI shall not be responsible for non-compliance based on incorrect, incomplete or non-timely information provided by Client.