

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN BERNARDINO  
REQUEST FOR PROPOSALS (RFP) FOR  
EMPLOYEE BENEFITS AND ADMINISTRATION SERVICES**

|   | <u>Project Due Date</u>                   | <u>Frequency</u> |
|---|---|------------------|
| A. Coordination of and participation in insurance/TPA meetings                            | As needed                                 | Quarterly        |
| B. Coordination and participation in Employee Benefits Advisory Committee (EBAC) meetings | TBD                                       | Monthly          |
| C. Insured Health Plans   |   |                  |
| 1. Annual benefit change review and rate renewals   | TBD                                       | Annually         |
| 2. Coordination of RFP and implementation of results                                      | TBD                                       | Every 3 years    |
| 3. Facilitate contract renewals   | TBD                                       | Annually         |
| 4. Participant satisfaction survey  | TBD                                       | Annually         |
| D. Insured Dental Plan  |   |                  |
| 1. Annual benefit change review and rate renewals   | TBD                                       | Annually         |
| 2. Coordination of RFP and implementation of results                                      | TBD                                       | Every 3 years    |
| 3. Facilitate contract renewals   | TBD                                       | Annually         |
| 4. Participant satisfaction survey  | TBD                                       | Annually         |
| E. Self-Funded Dental Plan  |   |                  |
| 1. Claims analysis report   | Within 30 days of the end of each quarter | Quarterly        |
| 2. Coordination of and attendance at quarterly TPA meeting.                               | Meeting held quarterly                    | Quarterly        |
| 3. Annual benefit change review and rate renewals   | TBD                                       | Annually         |
| 4. Coordination of RFP and implementation of results                                      | TBD                                       | Every 3 years    |
| 5. ASO Agreement  | TBD                                       | Every 3 years    |
| 6. Develop Plan Document  | TBD                                       | Annually         |
| 7. Develop Summary Plan Description   | TBD                                       | Annually         |
| 8. Actuarial rate renewals  | TBD                                       | Annually         |

|   | <b><u>Project Due Date</u></b>            | <b><u>Frequency</u></b> |
|---|---|-------------------------|
| 9. Actuarial rate impact of benefit enhancements/reductions   | TBD                                       | Annually                |
| 10. Participant satisfaction survey                           | TBD                                       | Annually                |
| <b>F. Vision Plans</b>  |   |                         |
| 1. Claims analysis report                                     | Within 30 days of the end of each quarter | Quarterly               |
| 2. Coordination of RFP and implementation of results          | TBD                                       | Every 3 years           |
| 3. Develop Plan Document                                      | TBD                                       | Annually                |
| 4. Develop Summary Plan Description                           | TBD                                       | Annually                |
| 5. Actuarial rate renewals                                    | TBD                                       | Annually                |
| 6. Actuarial rate impact of benefit enhancements/reductions   | TBD                                       | Annually                |
| 7. Participant satisfaction survey                            | TBD                                       | Annually                |
| <b>G. Self-Funded Short-Term Disability Plan</b>              |   |                         |
| 1. Claims analysis report                                     | Within 30 days of the end of each quarter | Quarterly               |
| 2. Annual benefit change review and rate renewals             | TBD                                       | Annually                |
| 3. Review and/or revise Plan Document                         | TBD                                       | Every 2 years minimum   |
| 4. Review and/or revise Summary Plan Description              | TBD                                       | Every 2 years minimum   |
| 5. Actuarial rate renewals/review                             | TBD                                       | Annually                |
| 6. Actuarial rate impact of benefit enhancements/reductions   | TBD                                       | Annually                |
| 7. Participant satisfaction survey                            | TBD                                       | Annually                |
| <b>H. Life Insurance Policies</b>                             |   |                         |
| 1. Coordination of RFP and implementation of results          | TBD                                       | Every 3 years           |
| <b>I. Section 125 Plans</b>                                   |   |                         |
| 1. Premium Conversion Plan Document review                    | TBD                                       | Annually                |
| 2. Premium Conversion Summary Plan Description review         | TBD                                       | Annually                |
| 3. Dependent Care Assistance Plan (DCAP) Plan Document review | TBD                                       | Annually                |

|   | <u>Project Due Date</u> | <u>Frequency</u> |
|---|-------------------------|------------------|
| 4. Dependent Care Assistance Plan (DCAP) Summary Plan Description review                                      | TBD                     | Annually         |
| 5. Medical Reimbursement (FSA) Plan Document review   | TBD                     | Annually         |
| 6. Medical Reimbursement (FSA) Summary Plan Description review  | TBD                     | Annually         |
| <b>K. Program Compliance</b>  |                         |                  |
| 1. Review compliance and recommend specific changes to comply with HIPAA requirements                         | TBD                     | Annually         |
| 2. Review compliance and recommend specific changes to COBRA program  | TBD                     | Semi-Annually    |
| 3. Review compliance and recommend specific changes to Section 125 plan                                       | TBD                     | Every 3 years    |
| 4. Review compliance and recommend specific changes to FSA plans  | TBD                     | Every 3 years    |
| 5. Program/Procedural Audit of STD plan   | TBD                     | Semi-Annually    |
| <b>L. Training</b>  |                         |                  |
| 1. Conduct on-site Section 125 training   | TBD                     | Every 2 years    |
| 2. Conduct on-site COBRA training   | TBD                     | Every 2 years    |
| 3. Conduct on-site training as necessary  | TBD                     | Annually         |
| <b>M. EHaP (Employee Health and Productivity) Program</b>   |                         |                  |
| 1. Participation in Employee Assistance Program (EAP) meetings  | TBD                     | Quarterly        |
| 2. EAP RFP  | TBD                     | Every 3 years    |
| 3. Participation in EHaP quality assurance meetings with health plans vendors                                 | TBD                     | Quarterly        |
| 4. Participation in Court-specific performance standards and data reporting meetings with health plan vendors | TBD                     | Quarterly        |
| 5. Integrated Disability RFP  | TBD                     | Every 3 years    |
| <b>O. Staff Support</b>   |                         |                  |
| New and ongoing project status inquiries  | Within 24 hours         | Daily            |