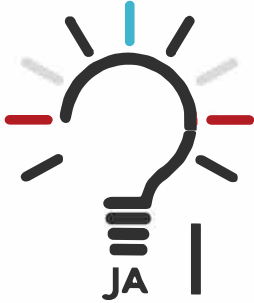


VALUABLE. RELEVANT. ACTIONABLE.



INSIGHT

Before you begin, here are some instructions and helpful tips to produce a successful survey.

Once you have logged into the survey, you can begin entering your information. When you are ready to move on to another section, the best way to navigate through the survey is to use the **BACK** and **NEXT** buttons located at the bottom of each section.

Each time you click **NEXT** the information you have entered thus far will be saved. You can also use the navigation located on the left side of each page to quickly move through the sections.

At any time, you can choose **SAVE & FINISH LATER** to exit the survey and return at a later time. Even if you process through the entire survey and click on the **SUBMIT** button at the end, you can always log back in later to make edits.

Current plan information you will need before starting:

- ✓ **General:** # Employees You Have, Industry Type
- etc. ✓ **Benefits:** Types of Benefit Plans Offered.
- ✓ **Medical:** Plan Type, Funding, Deductibles, Coinsurance, Out of Pocket Maximum, Office Visit Copays, Rx Deductible/Coinsurance or Copays, Premiums/Contributions, Cost Increase (%), # of Participants.
- ✓ **Dental:** Plan type, Funding, Deductible, Preventive, Basic/Major/Ortho Coinsurance, Annual Maximum, Premiums/Contributions, Cost Increase (%), # of Participants.
- ✓ **Vision**
- ✓ **The Affordable Care Act (ACA) Life & Disability**
- ✓ **Time Off:** Basic/Vacation/Sick/Personal/PTO, Leaves of Absence Days/Pay.
- ✓ **Wellness & Disease Management:** Program info.
- ✓ **Managing Costs**
- ✓ **Retirement:** Types of Plans, Vesting Schedules, etc.
- ✓ **Miscellaneous:** Additional Benefits You Provide.

Additional Tips

- If you would like a copy of your responses, after submitting your survey, choose “Print/Review Your Responses”. Then, choose “Convert to PDF” and you will be able to print the PDF, or you can email info@jabenefits.com for more info.
- If some questions do not apply to your situation or you are unable to find an answer, just leave them blank.
- The more answers you provide, the more accurate and powerful our analysis will be for you.
- Do NOT type (\$) dollar signs, (%) percent signs, or (,) commas while entering data.
- If your company’s benefits do not exactly fit the survey parameters, please complete the questions as best as you can with the format given.