BernieForms

BERNIEFORMS HOW TO:

Implementation Tips and Tricks

BERNIEFORMS IMPLEMENTATION
TIPS & TRICKS

1 Step 1: Getting ready

Choose which carriers you plan to quote, and print off copies of the questionnaires for the producers and service team members most responsible for quoting those carriers.

2 Step 2: Team meeting - Deciding on which questions to ask and how to ask them

In the meeting, go through each carrier questionnaire to decide which questions need to be asked and how to pose each question. For example, you might adjust "Hours worked?" to "Average hours worked per week?"

PRO TIP:

In BernieForms, you are able to ask two types of custom questions - option questions (meaning those with multiple choice answers) and text questions (meaning those with answers that will be entered in an open-ended text field).

Example:

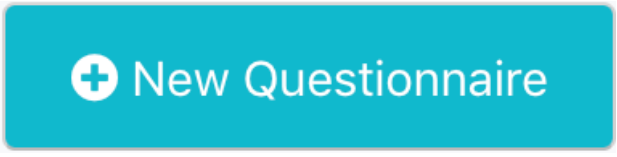
- Option Field Question: "What is your marital status?" Options: Single / Married / Widowed / Divorced
- Text Field Question: "What is your COBRA effective date (N/A if not applicable)?"

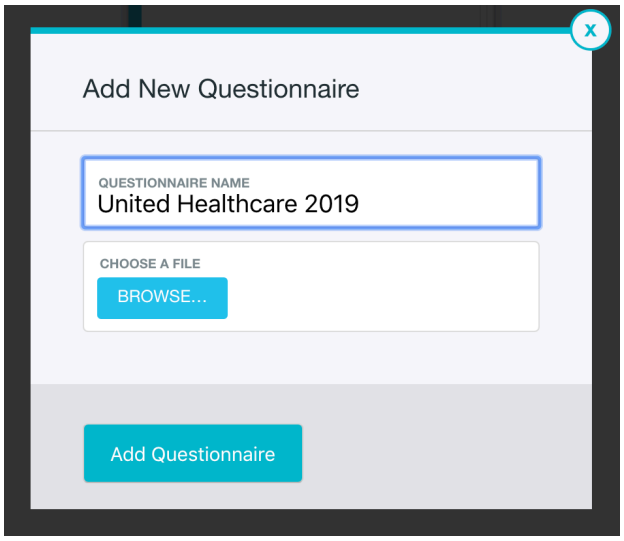
3 Step 3: Upload blank copies of the health questionnaires in BernieForms

In BernieForms, click on Questionnaire Library and then click on the "New Questionnaire" button. Upload and name each questionnaire. Make sure the questionnaires you upload are *not* encrypted. Find out how to unencrypt your questionnaires here.

PRO TIP:

Reach out to each carrier you plan to quote and have them send you the newest, freshest digital copy of their carrier questionnaire. Do not scan and upload older questionnaires as they won't be as clear in BernieForms when you try to map them.





BernieForms

BERNIEFORMS IMPLEMENTATION
TIPS & TRICKS

4 Step 4: Add all fields to BernieForms that you plan to use on health questionnaires

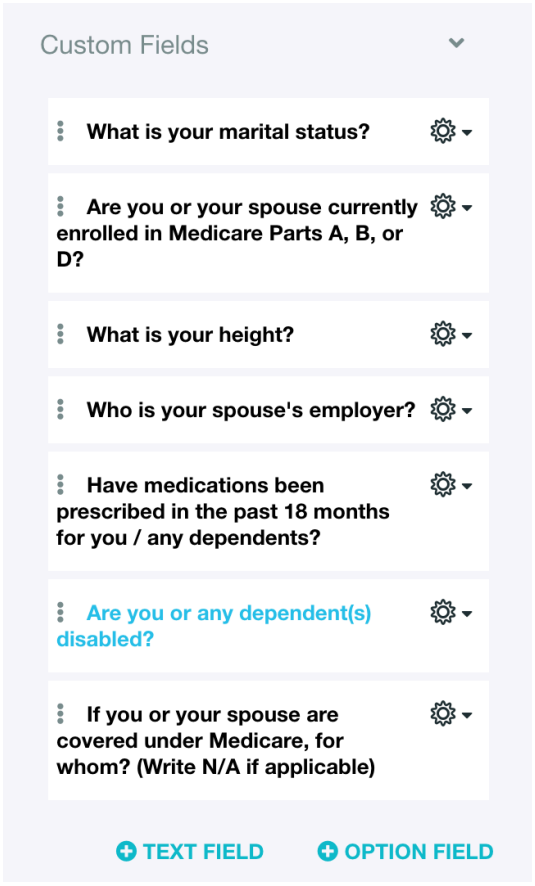
Click to open one of the health questionnaires that you have just uploaded. You'll see on the left hand side that you have the ability to add fields by selecting + New Field. Starting with the longest health questionnaire first, go through and add every checkable health condition that appears on the questionnaire.

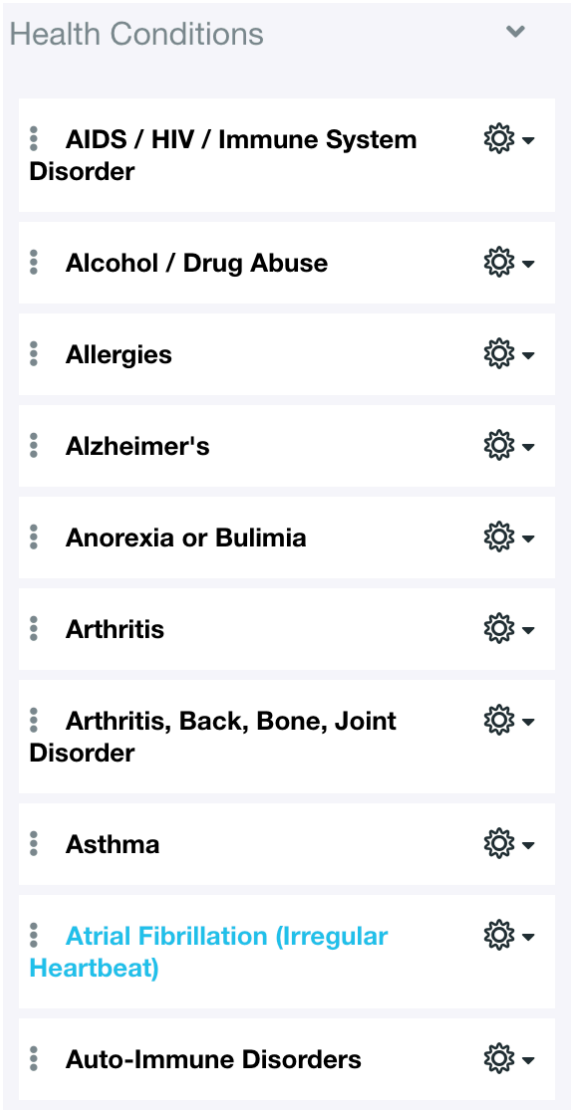
Then, do the same for the rest of the questionnaires. You do not have to add duplicate health conditions as they will carry over from questionnaire to questionnaire (and be automatically alphabetized).

Now, do the same for all custom questions that your team composed in the meeting.

PRO TIP:

The custom questions will appear to employees at the "Other" stage of the process in the same order they appear in the left-hand pane. So be sure to think through the order which you would like the questions to be posed to employees, ideally during your initial team meeting, then drag & drop them accordingly.





BernieForms

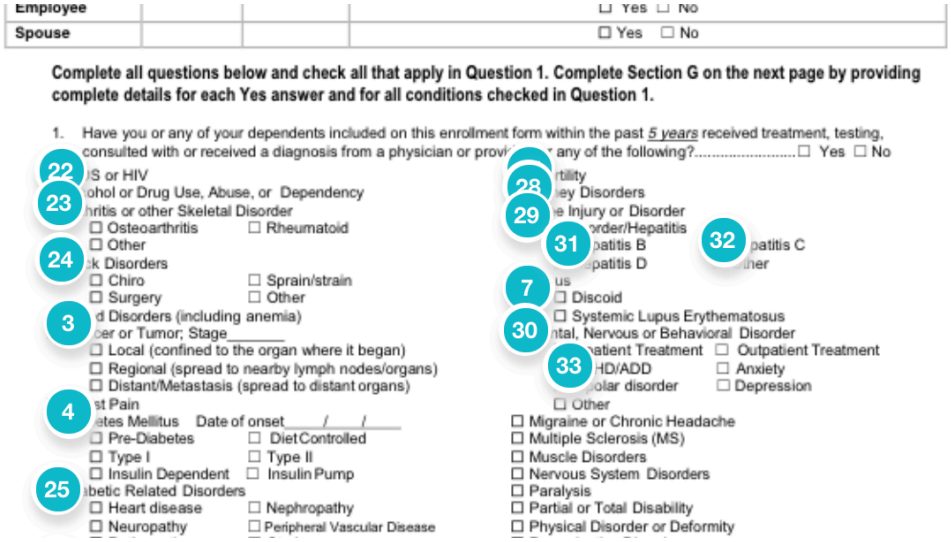
BERNIEFORMS IMPLEMENTATION
TIPS & TRICKS

5 Step 5: Map the questionnaires

Now you are ready to map your questionnaires. Open each questionnaire and drag and drop each field from the left-hand pane to where you want it to appear on the questionnaire.

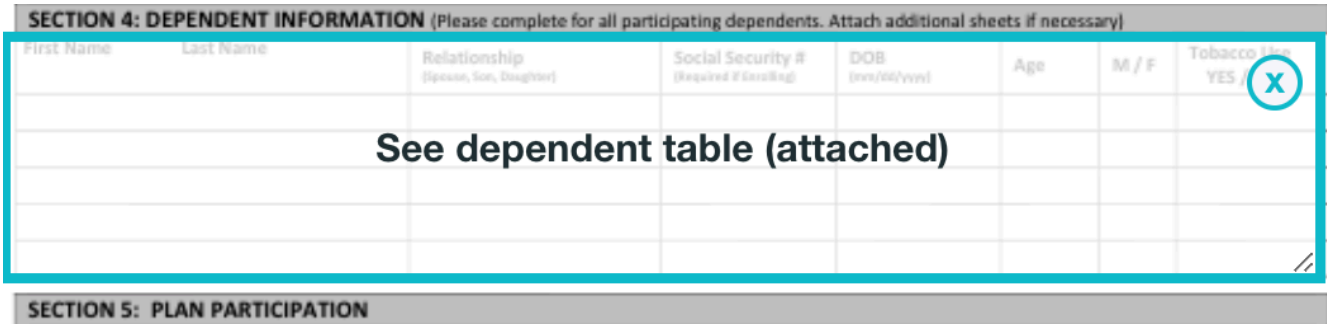
PRO TIP:

You'll want to map every health condition on top of the Yes check box on the questionnaire.



PRO TIP:

BernieForms automatically collects additional follow-up information about dependents and health conditions from the employee throughout the process, so you won't need to do anything beyond dragging and dropping a rectangle box over the relevant dependent or health condition table.

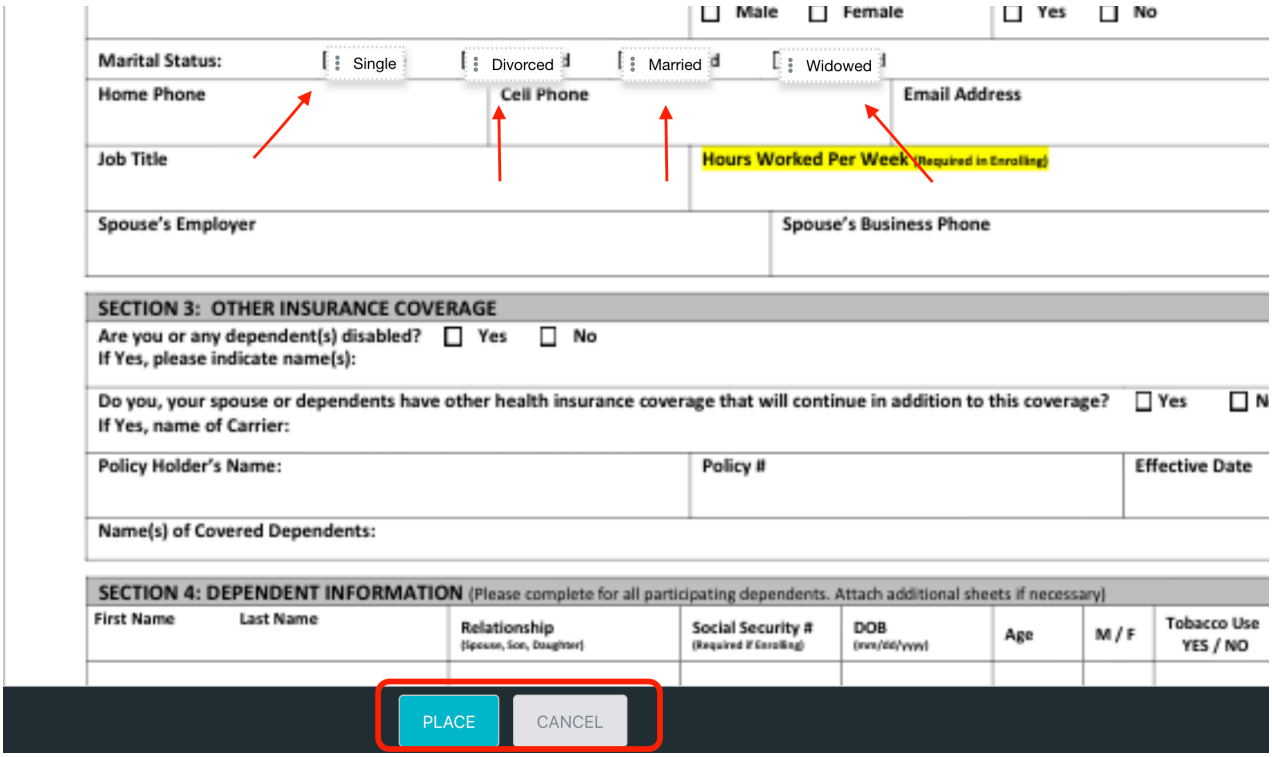


BernieForms

BERNIEFORMS IMPLEMENTATION
TIPS & TRICKS

PRO TIP:

For option questions, you'll be asked to map each potential answer over the relevant box on the questionnaire (for example - [Single] [Divorced] [Married] and [Widowed] all get separate boxes to map).



BernieForms