

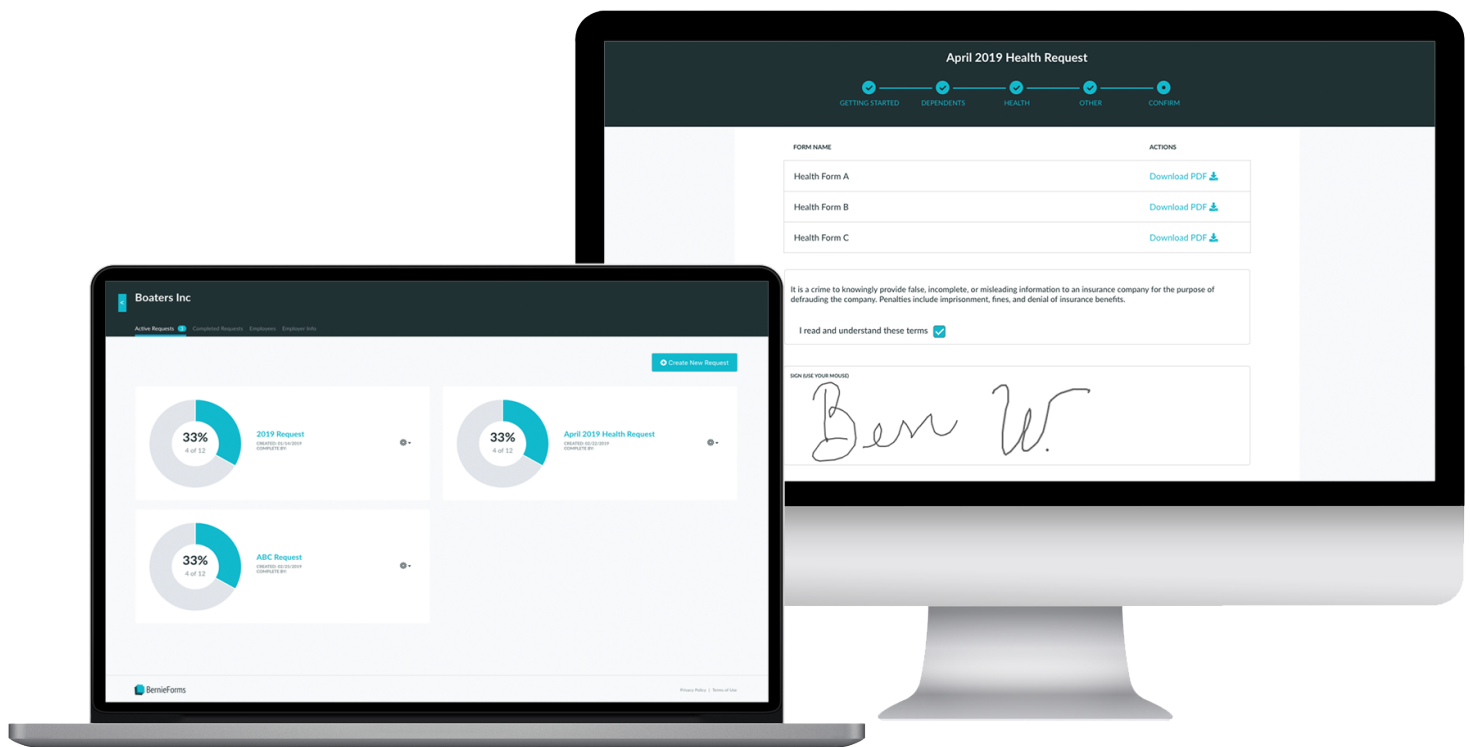


BERNIEFORMS

HOW TO:

*Mapping Carrier Health
Questionnaires in BernieForms*

BERNIEFORMS MAPPING GUIDE



The health questionnaire process can be frustrating. Here at BernieForms, we've spent a lot of time and energy trying to dramatically streamline and simplify that process for brokers and employees alike. That said, we realize the first time a user tries a new software, there is going to be a learning curve - and a time commitment. BernieForms is no different!

The first questionnaire will take you the longest to organize and map. Try to avoid dwelling on how confusing the questionnaires are. It's likely there will actually be a lot of laughter as you gain an appreciation for how hard it is for employees to fill these things out!

After you go through the first questionnaire, you'll find that while they might not be exactly the same, the subsequent questionnaires "rhyme". Because you'll have been through one or two already and developed consensus about how to do things, the later questionnaires will go more quickly. And the questionnaires and the fields you add to BernieForms aren't going anywhere. So you can guarantee next time will be that much easier as you'll just be updating and adding or removing questionnaires.

The moral of the story? We're confident you'll grow to love and appreciate the user friendliness and simplicity of BernieForms, but we know getting started is the hardest part. So, we've put together a step-by-step guide of how to map your questionnaires in BernieForms, as well as a few pro-tips, screenshots, and videos along the way.

[Check those out here!](#) Good luck!

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1 Step 1: Getting ready | *Estimated time: 15 minutes*

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. Schedule a 2-hour meeting with those people, as well as at least one agency principal, to go through each questionnaire with the purpose of deciding which questions need to be asked by BernieForms.

2 Step 2: Team meeting - Deciding which questions to ask and how to ask them | *Estimated time: 2 hours, can vary based on the number of questionnaires*

Often carriers use the same questionnaire for benefits elections and health questions and include information requests that are repetitive or unnecessary for quoting. That's why you'll want to host this meeting. 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?"

3 Step 3: Upload blank copies of the health questionnaires in BernieForms | *Estimated time: 5 minutes*

In BernieForms, click on Questionnaire Library and then click 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](#).

4 Step 4: Add all fields to BernieForms that you plan to use on health questionnaires | *Estimated time: 90 - 120 minutes*

Types of fields in BernieForms

1. Standard Fields - BernieForms comes preloaded with the following Standard Fields
 - *Employee Standard Fields:* First Name, Middle Initial, Last Name, Birthdate, Social Security Number, Gender, Email, Phone, Street Address, City, State, Zip Code, Employment Status, Hire Date, Job Title, Salary, Language, Hours per Week, Signature Date
 - *Employer Standard Fields:* Name, Address

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2. Custom Fields - these are fields that you'll need to add into BernieForms ahead of mapping your questionnaires. There are two types of Custom Fields:
 - *Option Questions*: Questions that can be answered by a series of options. Example: a Yes/No question like “are you planning to enroll in benefits?” or a multiple option question like “what is your marital status?” where Married/Single/Divorced/Widowed are all possible choices.
 - *Open-Ended Questions*: Questions that the employee will need to answer by providing information in a text box. Example: “what is your height?” or “who is your primary care physician?”
3. Health Conditions - this includes all of the health conditions from each carrier questionnaire.
 - *Single Mark Health Conditions*: Use this option if a health questionnaire requires employees to check a box indicating that they have a health condition.
 - *Yes/No Health Conditions*: Use this option if a health questionnaire requires employees to indicate ‘Yes’ that they have a health condition or ‘No’ that they do not have a health condition.
 - *Note*: You may have to create the same health condition as a Single Mark and a Yes/No Health Condition if you quote with multiple carriers.

[Home](#) [Employer List](#) [Questionnaire Library](#) Bernard Marketing

National General IMQ

Standard Fields >

Health Conditions >

YES/NO SINGLE MARK

Custom Fields >

TEXT FIELD OPTION FIELD

Rectangles >

Signature Blocks >

SIGNATURE BLOCK

ALLIED[®]
NATIONAL

FUNDING[®]
ADVANTAGE[®]

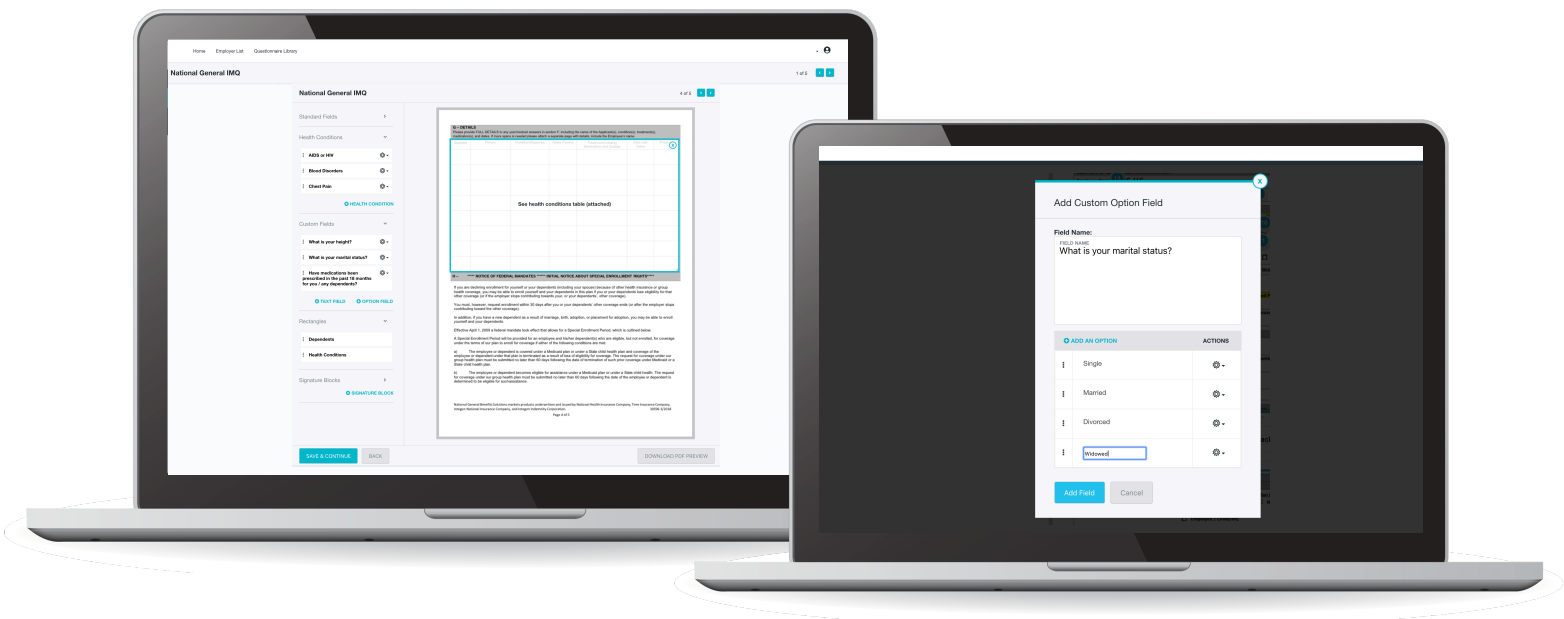
EMPLOYEE LEVEL-FUNDED HEALTH PLAN ENROLLMENT FORM
May be Photocopied or Duplicated for use. Please complete in ink and initial any alterations.

SECTION 1 – EMPLOYEE INFORMATION

FULL NAME OF EMPLOYEE		SOCIAL SECURITY NUMBER	MARITAL STATUS	ADM. USE ONLY
1	2	3		CASE NO.
4	5	6	7	EMPLOYEE NO.
8	9	10	11	CLASS
12	13	14	15	EFFECTIVE DATE
16	17	18	19	OCC <input type="checkbox"/> YES <input type="checkbox"/> NO

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4. Rectangles - rectangles cover up a portion of the health questionnaire with a message that indicates that the responses are appended at the end of the questionnaire for dependents and health conditions. You will simply map a rectangle box over the relevant dependent or health condition table on the questionnaire. BernieForms will automatically collect this information from the employee throughout the process, meaning that you won't need to do anything beyond dragging and dropping the rectangle box.
5. Signature Block - signature blocks will appear on an employee's "Confirm" page of the health questionnaire. When creating a new signature block, copy the confirmation language from that specific carrier questionnaire and label it accordingly. You'll drag and drop it on the Employee Signature line (likely at the end of the questionnaire).

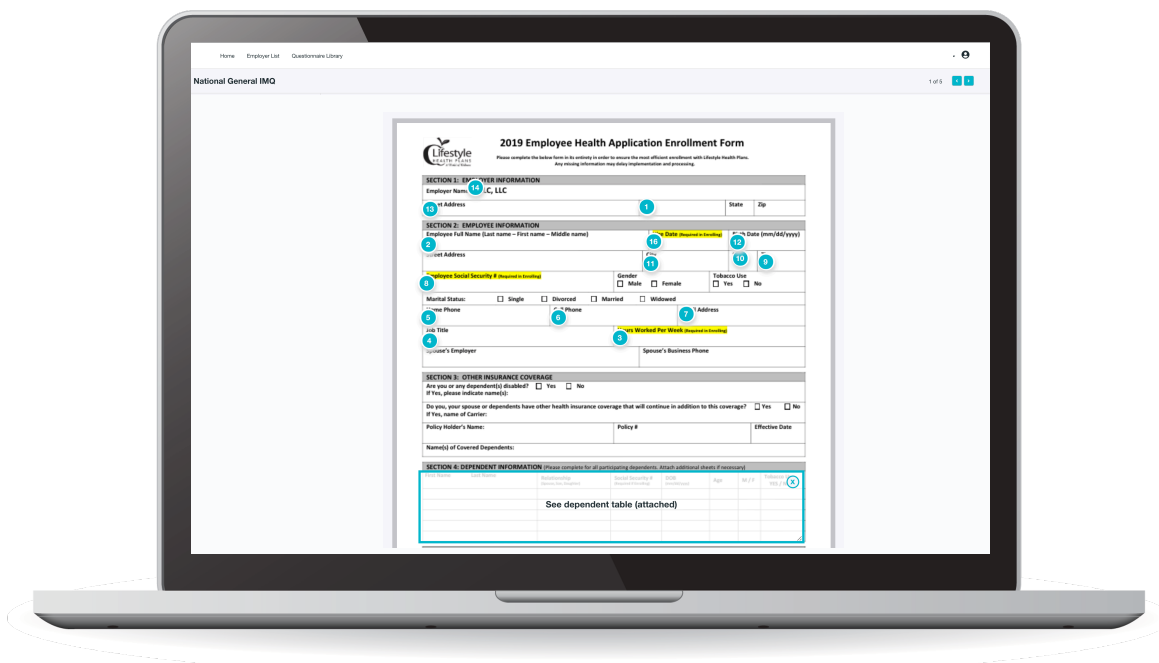


Now that we've first covered the different types of fields, let's review what you'll need to do. You'll need to add the health condition and custom question fields that you'll later want to map to each questionnaire.

To do so, 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).

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Now, do the same for all custom questions that your team composed in the meeting. 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, once you’ve added each custom question field, you can drag and drop them to be in whichever order you’d like for the employee to see them in.



5 Step 5: Map the questionnaires | *Estimated time: 30 minutes per questionnaire*

Now that you have “stocked” your health conditions and your custom questions, 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. Once you have completed this process, you’re ready to send a form request. Check out how to send [form requests and reminders here](#).

Want to see BernieForms in action? [Watch here!](#)



Have more questions about mapping health questionnaires?

Email BernieForms@bernardhealth.com