THE CINCINNATI LIFE INSURANCE COMPANY

***Headquarters:*** 6200 S. Gilmore Road, Fairfield, OH 45014-5141
***Mailing address:*** P.O. Box 145496, Cincinnati, OH 45250-5496
*cinfin.com* ■ 513-870-2000

# Worksite Case Overview

1. **Prior to Enrollment:**
   - Complete a Worksite Case Qualifier and submit to your Life Sales Field Representative for case approval
   - Obtain employer agreement to:
     - Mandate one-on-one meetings with all eligible employees who work a minimum of 20 hours per week
     - Allow interviews to take place on company premises or virtually and during regular working hours
     - Provide payroll deduction for premium payment
     - Review and complete the Agent/Employer Service Agreement
     - Distribute an employee group meeting announcement memo and payroll stuffer
     - Designate a coordinator to assist in getting employees to the enroller
     - Support annual re-enrollment activities including meetings with new hires
   - Improve enrollment set-up when you:
     - Ask the employer or key employee to endorse the program and attend all employee group meetings
     - Prepare the announcement memo on company letterhead for distribution
     - Identify the enrollment locations, ensuring adequate room for a confidential enrollment
     - Schedule a meeting with all supervisors and department heads prior to enrollment date
     - Arrange for group meetings to discuss the program, distribute sales brochures and answer any questions
   - Meet with appropriate payroll or Human Resources personnel to:
     - Determine the pay periods and the frequency in which payroll deductions are to occur
     - Identify the date of the first payday in the month deductions will begin and review the Billing and Service Handbook

2. **When enrolling, remember:**
   - Issue age is based on the policy contract date
   - Deductions begin with the first pay of the month following the enrollment
   - Payroll deduction authorizations must be signed by all eligible employees who enrolled in the program
   - Waivers must be signed by all eligible employees who chose not to enroll
   - Worksite Marketing Application Transmittal must be completed with each group of applications submitted
   - Five applications are required to begin a new list bill

3. **Following the completion of an enrollment:**
   - We contact the person you provided on the transmittal to confirm payroll set up and any special billing requests
   - You receive the first billing for delivery and review with the company
   - Each policy is mailed to the employee's home address unless there are delivery requirements, then the policy is mailed to you for delivery
   - You receive copies of record sheets and illustrations in most states

4. **When re-enrolling, remember to:**
   - Submit a Worksite Case Qualifier to your Life Sales Field Representative prior to re-enrollment
   - Expect a reminder from Cincinnati Life to schedule re-enrollment
   - Meet with all new employees hired since last enrollment
   - Be available to any employee who wants to review coverage, make policy changes or purchase additional coverage, and to any employee who previously waived coverage and now wants to participate
   - Follow all other procedures the same as a new case
   - An in-force policyholder report can be obtained upon request by phone or email – 844-833-7766 or *clicworksitemarketing@cinfin.com*