

Course Outline

Self-Funded Health Plans: Plan Administration *Three-Credit Course*

Introduction

- I. Introduction to Self-Funded Plan Administration
- II. Plan Sponsors and Employers
- III. Plan Participants and Beneficiaries

Estimated Time to Complete: 5 minutes

Plan Administration Options

- I. Plan Administrators
- II. In-House Administration
- III. Administrative Services Only (ASO) Arrangement
- IV. Third-Party Administrators (TPAs)
- V. Comparing and Contrasting In-House Administration, ASO Arrangements and TPAs

Estimated Time to Complete: 30 minutes

Common Administrative and Compliance-Related Tasks

- I. Maintaining Compliance With Federal Laws
- II. Enrolling and Disenrolling Plan Participants
- III. HIPAA Special Enrollment
- IV. Collecting and Tracking Plan Contributions
- V. Processing Claims
- VI. Timely Processing
- VII. Denying Claims
- VIII. Claims Appeals
- IX. Recordkeeping
- X. Form 5500
- XI. Participant Communication
- XII. Common Documents That Must Be Distributed to Plan Participants
- XIII. Administrative Requirements of HIPAA
- XIV. COBRA Administration
- XV. Reporting and Paying the Annual PCORI Fee

Estimated Time to Complete: 60 minutes

Types of Service Providers

- I. Plan Sponsor and Plan Administrator Responsibilities Regarding Service Providers
- II. Types of Service Providers
- III. Attorneys
- IV. Actuaries
- V. Accountants
- VI. Investment Manager and Advisors
- VII. Custodians and Directed Trustees
- VIII. Benefits Consultants
- IX. Stop-Loss Insurance Carriers
- X. Pharmacy Benefit Managers (PBMs)

Estimated Time to Complete: 45 minutes

Selecting and Monitoring Service Providers

- I. Selecting the Service Provider
- II. RFP Process
- III. Key Considerations When Implementing a New Vendor Relationship
- IV. Monitoring the Vendor
- V. Changing a Vendor

Estimated Time to Complete: 30 minutes

NOTE: The estimated time to complete each lesson is based on word count and assumes uninterrupted consumption of the course. Actual time to complete each lesson can vary widely based on familiarity with the topics and other factors. Time required to complete the course final exam is not counted in these estimates.