

Employee Kit Checklist

This is a list of items that should be included in the kit that you distribute to new staff when they are enrolled in the plan. Your kit will vary based on the plan design you utilize and the insurer that you use. This is a general guideline for your reference only.

- Employee Benefit Handbook (ensure it is the correct class and division)
- Wallet Card with policy, division and certificate numbers
- Drug Card (if applicable) as well as brochure if available
- Out of Country travel card and brochure with 1-800 numbers
(if applicable) (NOT for staff that are covered by spousal plans)
- Employee Assistance (EAP) Brochures and (if applicable)
- Sample claim forms (extended health and dental if applicable)
- Information on obtaining web-site access (if applicable)
- Contact information for provider (phone numbers)

You may also want to obtain a signed note from the employee indicating that they have received the information noted above and retain it on their personal file.

Much of the information noted above may also be obtained from your insurer's website. To access insurer sites, forms and contact info please visit our website at www.mainstayinsurance.ca