WORKSHEET INSTRUCTIONS: Answer the questions in the following worksheet as completely as possible. ***Do not*** *refer the reader to another section of your response, unless the question indicates that you may do so. You may expand the spacing in the worksheet to accommodate your responses.*

1. **Company Information:**

|  |  |
| --- | --- |
| Company Name: |  |
| Address: |  |
| RFP Contact Name: |  |
| Contact Email: |  |
| Contact Phone: |  |

1. **General Administration:**

|  |  |  |
| --- | --- | --- |
| Question | Confirm included at no additional cost  (Yes or No) | Deviation |
| 1. Confirm proposer will accept enrollment and disenrollment files from the County’s online enrollment vendor, currently BenefitFocus. |  |  |
| 1. Confirm proposer will accept the County’s self-billing practices. |  |  |
| 1. Confirm proposer will be available to attend approximately 4 annual enrollment events and benefit fairs. Meetings maybe virtual at the County’s discretion. |  |  |
| 1. Confirm proposer will provide educational brochures and other materials that clearly explain the available legal services at no additional cost. |  |  |
| 1. Confirm there are no minimum participation requirements. |  |  |
| 1. Confirm any applicable waiting periods will be waived for participants currently enrolled in the prepaid legal services plan through Lake County with the current vendor. |  |  |
| 1. Confirm that there will be a dedicated Account/Service manager. |  |  |

|  |  |
| --- | --- |
| Question | Response |
| 1. Provide the days and times participants will have access to trained customer service representatives via a toll-free number. |  |
| 1. Does the member website provide the following services? |  |
| * 1. Attorney locator |  |
| * 1. Downloadable self-help legal documents |  |
| * 1. Educational tools |  |
| * 1. Helpful links to resources and other sites |  |
| * 1. Assistance for identity theft through FTC website and credit monitoring services |  |
| * 1. Glossary of legal terminology |  |
| * 1. Detailed definitions of covered services |  |
| * 1. Ask an Expert |  |
| 1. Describe mobile apps available to members, if any, for Legal Services. |  |
| 1. Describe mobile apps available to members, if any, for ID Theft Protection. |  |
| 1. Describe methods put in place to ensure high levels of customer service and satisfaction. |  |
| 1. Describe quality control measures in place to monitor the quality of legal services performed for participants and their dependents. |  |
| 1. Outline plan portability rules. |  |

1. **Plan Benefits:**

| Question | Confirm (Yes or No) | Deviations including additional costs |
| --- | --- | --- |
| 1. Confirm benefits will be available for the following persons, in addition to the named plan member/employee, who shall be related to the plan member/employee as follows with written authorization from eligible plan member.    1. Spouse, residing in same residence or domestic partner under the stipulation that they show proof that they have been in a committed relationship for no less than one year.    2. Any unmarried child (adopted and stepchild) under 18 years of age and dependent upon the plan member for support and maintenance.    3. Any unmarried child (including adopted and stepchild) under 25 years of age, whether or not living at the Plan Member’s residence. | a. |  |
| b. |  |
| c. |  |
| 1. Confirm the following services will be provided in the State of Florida by a Designated Attorney. |  |  |
| 1. A free consultation at the Attorney’s office, by telephone or otherwise |  |  |
| 1. Actions by consumer against manufacturers, distributors or service agencies when based on warranties or guarantees, whether implied or expressed. |  |  |
| 1. Preparation of Wills and Living Wills, Durable Power of Attorney, Simple Trusts including periodic review and revision of wills, Revocable/Irrevocable Living Trust, and Uncontested guardianship or conservatorship. |  |  |
| 1. Estate planning to include consultation and advice concerning planning the covered person’s estates, including consultation with the member’s financial planners or accountants. |  |  |
| 1. Civil Actions as Plaintiff – Up to and including trial for all civil cases where there is a legitimate cause of action and is not a frivolous case. |  |  |
| 1. Civil Actions as Defendant in all cases. This includes representation through trial. |  |  |
| 1. Adoptions including stepparent and otherwise. |  |  |
| 1. Real Estate Transactions including review or preparation of purchase agreement, mortgage, and deed, Refinancing of primary residence, and real estate disputes |  |  |
| 1. Landlord/Tenant Law concerning lease or rental of the plan member’s dwelling in plan member’s capacity as tenant |  |  |
| 1. Insurance Law – Representation and consultation in all matters between the plan member and any insurance company with which the plan member has dealings or relations. |  |  |
| 1. Traffic Violations for non-criminal moving traffic violations. |  |  |
| 1. Preparation of normal and customary legal documents and legal forms. |  |  |
| 1. Change of Name |  |  |
| 1. Probate of Wills - Representation in the appropriate court for judicial determination of death and heirship claims where Plan Member is Personal Representative, heir or beneficiary. |  |  |
| 1. Family Law – Legal representation for family law matters including:  * Contested and Uncontested Divorce * Child Support * Child Custody * Post Judgment Enforcement * Post Judgment Modification * Annulment * Guardianships * Elder Law Matters * Adoption * Paternity |  |  |
| 1. Criminal Violations – Representation for criminal misdemeanors with service available through trial in state courts including:  * Defense of Juveniles – representation of Plan Member’s minor (under age 18) dependent children in judicial proceedings. * DWI/DUI – representation for defense of Driving While Intoxicated charges, including driving with unlawful blood alcohol level (DUBAL). This includes driving under the influence, and any other alcohol or drug related traffic offenses similar to these offenses. |  |  |
| 1. Personal Injury – Including auto accidents, medical malpractice and similar causes of action. |  |  |
| 1. Bankruptcy  * Chapter 7. Coverage includes consultation, preparation of petition and Schedules, attendance at 341 meeting of creditors. * IRS audit protection * Debt collection |  |  |
| 1. Immigration  * Visa Extension * Naturalization – defined as advice, consultation, preparation and filing of applications for naturalization before the United States Bureau of Citizenship and Immigration Services. * Deportation (Now Known as Removal) – defined as advice, consultation and appearance before the U.S. Immigration Court to provide members with Defense of Removal actions and/or applications for Relief from Removal before the Immigration Judge |  |  |
| 1. Business Law – Legal advice and preparation for Plan Member for one (1) corporation, partnership, or similar business entity. |  |  |
| 1. All other legal matters – Designated Attorneys shall provide legal representation for all other limited or non-covered legal matters for a discount from their normal hourly rates. |  |  |
| Identity Theft |  |  |
| 1. Monitor (Dark Web) for the following items:  * Compromised Credentials * Account takeover including mortgage inquiries, credit applications, collections, etc. * Bank Account Numbers * Driver’s License * Email Address * Medical ID * Social Security Number |  |  |
| 1. Provide the following service as related to credit:  * Instant credit inquiry alerts * One bureau credit report monitoring * Once bureau quarterly credit report and score * Monthly credit score tracker * Manger credit freeze |  |  |
| 1. Provide the following service as related to identity theft recovery:  * Management of identity restoration process * Assistance in cases of ransomware including financial reimbursement * Provide Identity Theft Insurance * Expungement of criminal records due to identity theft |  |  |
| 1. Provide the following service as related to social media and fraud alerts:  * Change of address monitoring * Court records monitoring * Hacked accounts * Impersonation accounts * Medical ID fraud protection |  |  |

|  |  |
| --- | --- |
| Question | Response |
| 1. Family law currently has a fifteen (15) hour limitation for contested matters. Proposals must meet or exceed this limit. Any limits must be clearly disclosed. |  |
| 1. Describe any limits on the number of hours for the above services that may be used during a plan year. |  |
| 1. Outline any waiting period rules / limitations that may apply. |  |
| 1. Quarterly reporting shall be provided reporting at a minimum, premium paid and claims utilization reported by the type of service. |  |

1. **Network:**

|  |  |  |
| --- | --- | --- |
| Question | Confirm (Yes or No) | Deviation |
| 1. Confirm all attorneys on the panel must be members in good standing of the state Bar Association in which the legal services are performed. |  |  |
| 1. Confirm a comprehensive network is available in Lake County and provide adequate access to services throughout the geographic area to permit access and provide satisfactory and timely legal services. |  |  |
| 1. Confirm a comprehensive network of Certified Fraud Examiners to provide adequate access to services throughout the geographic area to permit access and provide satisfactory and timely services in the case of identity theft. |  |  |

|  |  |  |
| --- | --- | --- |
| Question | Response | |
| 1. Provide the number of attorneys contracted with in Lake County. |  | |
| 1. What is the re-credentialing frequency? |  | |
| 1. Are attorneys available for Saturday and evening appointments? |  | |
| 1. What is the average tenure of law firms? |  | |
| 1. Describe benefit coverage for events that cross state line. |  | |
| 1. What is the percentage of attorneys who have remained in network for 5+ years | Lake County |  |
| State of Florida |  |

1. **Cost and Performance Guarantees:**

|  |  |  |
| --- | --- | --- |
| Product | Employee Only Monthly Premium | Employee Plus Family  Monthly Premium |
| Legal Plan Only | $ | $ |
| Legal Plan +Identity Theft Coverage | $ | $ |
| Identity Theft Only | $ | $ |

|  |  |
| --- | --- |
| Question | Response |
| 1. Confirm premiums listed above are guaranteed for three (3) years, with the option to renew for an optional two (2) years. |  |

|  |  |  |
| --- | --- | --- |
| **Category** | **Target** | **Financial Penalties** |
| Customer Average Speed of Answer |  |  |
| Customer Call Abandonment Rate |  |  |
| Quarterly Reporting |  |  |
| Member Satisfaction |  |  |

**As an officer of the company, I certify that the information contained in our proposal is accurate, and our company will be bound by the contents of our proposal.**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signature**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Printed Name/Title**