



## About Advanced Benefit Consulting

Advanced Benefit Consulting & Insurance Services, Inc. is a full-service employee benefits consulting firm specializing in group health benefit programs and HIPAA compliance, with an emphasis in self-insurance. We have been in business since 1995. Clients of Advanced Benefit Consulting include single employers as well as third party administrators, general agencies, excess loss carriers, managing general underwriters, the U.S. Department of Labor, and public sector groups. In the privacy area, our clients also include private employers, insurance agencies, general agents, medical providers, church groups, child adoptive and foster care services and insurance carriers.

Advanced Benefit Consulting specializes in HIPAA compliance, Privacy training and Implementations, large group employee benefit consulting, including self-insured health plans, Taft Hartley plans, and ERISA regulation. Our public sector affiliations also make us experts in the Public Health Service Act.

Advanced Benefit Consulting can also provide compliance assistance for COBRA, HIPAA, and other federal benefits-related laws. We are also familiar with state laws in the state of California. However, we are not attorneys and do not provide legal advice of any kind. Our firm published an employer HIPAA self-administration manual in the fall of 2000, with an ongoing update service. As you prepare for HIPAA medical records privacy, our firm is one of the few prepared to fully assist you. We recently developed a turnkey HIPAA medical records privacy system for our employer clients, much like our HIPAA manual. We offer full-day and half-day privacy training, including a 6-hour Employer Privacy Officer and Privacy Work Group Team Program, designed to meet the requirements of HIPAA under 45 CFR Sec. 164.530(a)(1)(i). We are prepared to offer client preparation and staff training for all medical records privacy training functions required by the new regulations, which went into effect on April 14, 2003 for large plans and April 14, 2004 for small plans.

We offer current legislative and regulatory updates to our clients on an ongoing basis. Our president is our primary consultant and is a nationally known and well sought-after speaker and instructor on HIPAA compliance, self-funding, third party administration of single employer and multiple employer welfare plans, Taft Hartley plans, Public Sector plans, excess loss and federal compliance issues, and a frequently published writer on many benefits issues, particularly HIPAA and self-insurance. Current topics include HIPAA employer audits and HIPAA privacy regulations and implementation. She has a unique ability to “digging in” to complex regulations and put them into a simplified, workable, administrative function for employers (she calls it a curse, rather than a gift!).

We are members of the Self-Insurance Institute of America, The National Association of Health Underwriters, Society of Human Resources Managers (SHRM), Professionals in Human Resources Association (PIHRA), National Human Resources Associations (NHRA), and many other professional associations.

Employee benefits administration is no longer a simple thing. With escalating benefit costs and fierce competition in the marketplace, your employee benefit plans can make up a large portion of your business overhead. At Advanced Benefit Consulting, we take your business very seriously. We offer you the highest level of benefit technical expertise available in the market today, and the highest standard of customer service.

*Advanced Benefit Consulting & Insurance Services, Inc.  
PO Box 6677, Fullerton, CA 92834-6677  
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Toll Free (866) 658-3835  
California Insurance License Number 0D40564*

# Compliance Services

Advanced Benefit Consulting provides a number of complimentary compliance services to our brokerage clients, including compliance assistance with ERISA, Section 125, COBRA, HIPAA and other federal laws, as well as state legislation and regulatory assistance.

We are unprecedented experts in ERISA, COBRA and HIPAA issues. In fact, our expertise in HIPAA became so apparent that a second office was opened in 2002 solely to meet the demands of our HIPAA products and services. In January, 2005, this office became a combined HIPAA Services and Brokerage Services office.

Advanced Benefit Consulting continues to provide compliance assistance to our clients, including an ongoing legislative and regulatory alert service, complimentary seminars, HIPAA manual, HIPAA privacy implementation (complimentary to groups over 100), access to the Client Only section of our website, and a number of other services.

## HIPAA Compliance Services

**FULL SERVICE STAND-ALONE ON-SITE HIPAA  
CONSULTING ASSISTANCE**

*Or*

**SELF-ADMINISTRATION HIPAA MANUAL WITH  
SIMPLIFIED INSTRUCTIONS AND A CD ROM FOR EASY  
COMPLIANCE**

Our unique stand-alone HIPAA compliance services are designed to fit any budget. If you have a full HR staff and the ability to become compliant on your own, we can help you with our HIPAA compliance self-administration manual. For others, we are able to come on-site and do the work for you initially, then train your staff for ongoing compliance needs. Either way, you become compliant quickly and efficiently.

Whether you need help with all of HIPAA – from portability and certification to HIPAA's new Privacy Requirements, our services are ready to help you comply!

Advanced Benefit Consulting can help you with privacy training for your firm, administrative forms, procedures and notices, and so much more!

It's simple, it's easy, and it's affordable!

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# HIPAA Privacy Officer Training

## *Are You Ready for Privacy Laws???*

Federal Privacy Laws include HIPAA's Medical Records Privacy and Gramm-Leach Bliley Act. State laws and regulations in California include the Insurance Information and Privacy Protection Act, California Department of Insurance's Final Regulations, Confidentiality of Medical Information Act, Confidentiality of Social Security Numbers, and a number of other acts and regulations that will play a substantial role in your human resources and managerial decision-making processes.

HIPAA Medical Records Privacy, a comprehensive federal law with many employer requirements, is effective as early as 4-13-03 (compliance date for large health plans, as defined by IRS; small health plans effective 4-13-04). Have you taken the steps necessary to comply? Plan sponsors are required to appoint a privacy officer. Privacy officer training is required for plan sponsor personnel by HIPAA – see 45 CFR Sec. 164.530(a)(1)(i).

- California and Nationwide Privacy Officer Public Training Seminars Now Available!
- Sub-contracted Privacy Officer Seminars at your Chosen Location also Available on-site, if Preferred (minimum of 20 attendees)!\*
- All Health Plans Must Elect a Privacy Officer and Receive Privacy Training!
- Medical Records Privacy Effective Date is 4-13-03 for Large Plans and 4-13-04 for Small Plans!
- Certificate of Completion, Action Plans and Comprehensive Employer Notebook Included with our Privacy Officer Formal Training!
- Compliance Tools, Privacy Notices, Business Associates Agreements and other Forms and Procedures Available Stand-alone or part of a Comprehensive Privacy Compliance Package!
- Training Tools such as Posters, Training Videos and Other Tools Available to our Employer Clients!

\*Outlying/remote areas may require higher minimums.

***Note: The privacy rule does not require attendance at any specific seminars. We offer a convenient vehicle to fulfill training requirements through public and private seminars.***

***Have you appointed a Privacy Officer yet?  
Has your privacy officer been trained? We can help!***

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# HIPAA Manual

- With Step-By-Step Instructions
- CD Rom with Ready-To-Use Forms and Sample Materials; most documents are word documents
- Simplified Format That Makes Administrative Use Much Easier to Understand than Many Attorney-written Manuals
- No Legal Jargon!
- Audit Organizer
- Suggested Policies and Procedures
- Annual Update Service Optional
- 2003- 2005 Privacy Updates
- Business Associates Agreements
- Action Plans in chart form for easy review and implementation
- Security Plan Chart
- Sample Privacy Notice and Authorization Forms
- Sample Plan Amendments and Certification
- Suggestions for Privacy Policies and Procedures and much more!

## **NOW WITH ARRA AND HITECH ADDITIONS!**

- Business Associate Agreement Amendments for HIPAA Security and ARRA/HITECH
- Updated Security Plan Chart with ARRA and HITECH Additions
- Sample Laptop & Electronic Security Policies and Procedures
- Sample Breach Notification Letter
- Sample Breach Incident Assessment Form
- HITECH Safe Harbor Chart & Questionnaire (for consultant verification of safe harbor compliance)
- And more for ARRA and HITECH!

## **AFFORDABLE SELF-ADMINISTRATION EMPLOYER HIPAA MANUAL WITH SIMPLIFIED INSTRUCTIONS AND A CD ROM FOR EASY COMPLIANCE**

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## **Other Compliance Services**

As new laws are passed or new regulations released, Advanced Benefit Consulting automatically notifies our brokerage clients of how they will be affected. ABC also provides an analysis, as well as complimentary assistance and model and sample forms, notices or other helpful information. In addition, when proposals are introduced in Congress or the state legislature which will impact our clients and their health plans, we also inform our clients with voter notices or similar.

We specialize in self insured and mid-size to large group health plans. We are experts in ERISA, COBRA, and HIPAA.

We assist our clients with annual Medicare Part D notices and CMS filings, 5500 filings and other compliance activities.

### **Broker Services and Complimentary Privacy Implementation for Broker/Agency Clients**

Advanced Benefit Consulting is a full service health brokerage firm. We offer our groups of 100+ employees (with at least 100 employees covered under medical plans and other related benefit programs) free HIPAA Privacy Implementation if we take over the broker of record for health and related benefits (\$3,000 monthly commission and/or fee revenue required). 2-year contract required (3 year contract required for provider function groups). We will happily prepare a proposal to illustrate all we can do for you!

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