

Company: _____ Contact: _____ Phone: _____ Date: _____



DynamicHR
Total Human Resource Administration

DOCUMENTS NEEDED FOR PROPOSAL

REQUIRED DOCUMENTS

- Copy of Payroll Invoice
- Current Provider Invoice and Plan Summaries
 - Medical
 - Dental (*if applicable*)
 - Vision (*if applicable*)
- Workers' Compensation Declaration Page (Premium Page)
(Page indicates Comp. Codes, Rates, Experience Mod., Discounts)
- 401(k) Invoice

ADDITIONAL DOCUMENTS THAT MAY BE REQUIRED

- Current Payroll (Master Control, Payroll Register, Labor Distribution)
- Current State Unemployment Rate or a copy of Quarterly Report
- Current Provider Invoice and Plan Summaries for STD/LTD/Life/Supplemental Insurances
- Census of Eligible Employees for Benefits
- Loss Runs (three years, currently valued)