



SELF INSURANCE CERTIFIED SPECIALIST®

Program Cost

The Self Insurance Certified Specialist®

\$995

The Exam

- 100 multiple choice questions

Recertification Policy

- Self Insurance Certified Specialist® Certification expires 2 years after date of issue
- Recertification Fee \$500 for 2 years
- 10 Total Hours of continuing education required per (2 year) recertification period
- Annual fee of \$100 per year to maintain certification and gain access to online continuing education resources



While more than 50 percent of large employers self fund their employee benefits programs, the self funded industry is expected to have significant growth in the future. As organizations continue to grapple with controlling their insurance costs, more large, mid-size and smaller organizations are looking at self funding their benefits.

Self Insurance Certified Specialist®, created in conjunction with the Self Funding Employer Association (SFEA), is a certification of expertise that requires 8 hours of training/classes and can be completed either live in-person at an event or online. In order to maintain certification after the required training, Self Insurance Certified Specialists® must complete 5 hours per year of continuing education credit to stay up to date with the best practices and standards in the industry.

The Self Insurance Certified Specialist® was created for:

- HR Professionals
- Insurance Professionals
- Insurance Agents
- Healthcare Professionals
- Brokers & Consultants
- Other Industry Professionals

Benefits of Becoming a Self Insurance Certified Specialist®

Becoming a Self Insurance Certified Specialist® provides you with a competitive edge in the industry by demonstrating to employers and colleagues that you:

- Have a higher level of understanding and knowledge of self funded plans
- Possess the training and knowledge to successfully implement and manage a self funded plan
- Understand the timeline of implementing different aspects of self funded plans
- Demonstrate that you are up to date with current best practices and rules in regards to self funded plans on an ongoing basis through continuing education courses required for recertification
- Possess the qualifications and abilities for job promotion and career enhancement

For more information, please contact us at

Info@SelfFundingAssociation.com or call 561.790.1176



SELF INSURANCE CERTIFIED SPECIALIST®

Registration



1. Complete

the online application

2. Register

for the training program/
classes: **8 hours** of
credits required for
certification

3. Take

the 8 hours of online
education and exam within
65 days of beginning the
course.

- **Participant must pass exam with a grade of 75% or higher. User will be given two opportunities to pass the exam before paying a re-examination fee**

What you will learn to become a Self Insurance Certified Specialist®:

- What types of benefits should be self funded
- The advantages and disadvantages/risks of self funding
- How aggregate and specific stop loss/reinsurance works
- How cash flow works and the control of reserves – return of investment on reserves
- Control and flexibility in plan design, plan document creation & excluded benefits
- Compliance and legal issues
- Claims experience
- Claim utilization and cost controls
- Transparency issues with costs and vendors/service providers
- Provider networks
- Managing a prescription drug program
- How to choose a TPA, Reinsurer, PBM and other vendors/service providers
- And more...

Benefits for Employers/Corporations:

By requiring or covering the expense of certification for your staff, you are ensuring that your staff has the most updated policies, rules and regulations and that current best practices are implemented in regards to self funded employee benefits plans and compliance. Self Insurance Certified Specialist® staff can help your organization maintain a competitive edge.

The Self Insurance Certified Specialist® program is provided to professionals who:

- Pass a challenging 100 question exam
- Meet educational requirements
- Update their self funding specialty credentials through continuing education courses required in order to maintain Self Insurance Certified Specialist® designation

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SELF INSURANCE CERTIFIED SPECIALIST® GROUP CERTIFICATION PACKAGE



The Employer Healthcare & Benefits Congress (EHBC) offers several specialists certification programs that are aimed at improving your education and providing you with that competitive edge you've been looking for. The programs are focused on providing transparency, education and communication. The Self Insurance Certified Specialist® requires 8 modules of educational training followed by an online 100 question exam. Becoming certified through our organization demonstrates credibility and marks you as the expert in your respective field. The interactive and custom training through one of our certification programs will provide you with an indubitable competitive edge in your field of work.

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SELF INSURANCE CERTIFIED SPECIALIST® GROUP CERTIFICATION PACKAGE

Instructional Training Methods

- 8 Educational Training Videos, approximately 45 minutes in length in one of the following formats:
 - Online classroom through our digital educational platform
 - Live webcast (additional fee required, please contact for more information)
 - Face to Face proctoring (additional fee required, please contact for more information)
- Upon completion of all educational training, participants are eligible to take online certification exam in Digital Chalk platform
- Upon successful completion of certification exam, participants will receive designation as a Self Insurance Certified Specialist® in their respective program as well as the certification seal to use on all their business and social media related material
- All Certified Corporate Wellness Specialists® will be featured on wellness association website (www.SelfFundingAssociation.com) and will be searchable through our unique search functionality by country, state and city with their name, title and company along with a message feature allowing the person to be contacted by anybody (their actual email addresses will be hidden).
- EHBC Support Staff for online access and inquires
- Automatic renewal of certification administered by EHBC*
- Press Releases/Blogs on Company certification and success

Additional Added Value for Group Certifications

- 12 - 24 Participants ~ 15% off individual certification value
- 25 - 36 Participants ~20% off individual certification value
- 37 + Participants ~ 30% off individual certification value
- Customized Q&A follow up based on compilation of questions submitted by each participant
- Option to log in once per month for live Q&A with Jonathan Edelheit, President of the EHBC
- 50% off the purchase of any other certification with enrollment in the group certification program
- 2-Year Renewal for each associate certification included in group package (\$200 value per each individual certification)
- Custom E-Blast schedule to inform participants on certification information, Digital Chalk access, step-by-step instructions, additional self insurance updates, reminders for quarterly webinars and access to self insurance webinars
- Custom analysis reports of associates progress and pass rates

Group certifications are designed for unique and specific accommodations. The EHBC will work on a consulting level to personalize a program to meet the needs of your organization.

***All certification programs are active for two years, with 5 HRs of CE requirements per year to maintain valid certificate. EHBC will automatically renew certification, per the renewal requirements, for your organization.**

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SELF INSURANCE CERTIFIED SPECIALIST® HOW TO PROMOTE YOURSELF

How to Promote Yourself as a Self Insurance Certified Specialist®

Aside from the comprehensive educational aspect, the Employer Healthcare & Benefits Congress (EHBC) certifications are also designed to give the Self Insurance Certified Specialist® “brand-ability” to promote themselves and their work. We built a unique search functionality on our Self Funding Employer Association website (www.SelfFundingAssociation.com). that features all Self Insurance Certified Specialist® by country, state and city. Additionally, each person will have a brief bio; their name, designation and organization. While educational remains of core importance to this program, we believe strongly in “brand-ability”, and making sure all of our Self Insurance Certified Specialist® are recognized for their achievements and are distinguished from the rest.

Here are some additional ways to promote yourself as a Self Insurance Certified Specialist®



1. Brand Yourself

Give yourself maximum exposure and set yourself apart from the rest by using our certification seal on all your business and social related materials including business cards, and email signatures



2. Display

Show your clients and business associates you are a true expert in your field. Frame your certification using our framing option feature after passing the final exam and have your certification framed in beautiful dark wood on the wall of your office

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SELF INSURANCE CERTIFIED SPECIALIST® HOW TO PROMOTE YOURSELF

Your Name
Certification Coordinator at Employer Healthcare & Benefits Congress. **Self Insurance Certified Specialist®**
West Palm Beach, Florida Area | Health, Wellness and Fitness

Current: Certification Coordinator at Corporate Health and Wellness Association
Previous: Self Employed, Trion Properties, LLC
Education: Bachelor of Arts (B.A.) Social Sciences, Urban & Regional Planning at University of Central Florida

500+ connections

Honors and Awards: **Self Insurance Certified Specialist®**
• Cambridge University CELTA Certification

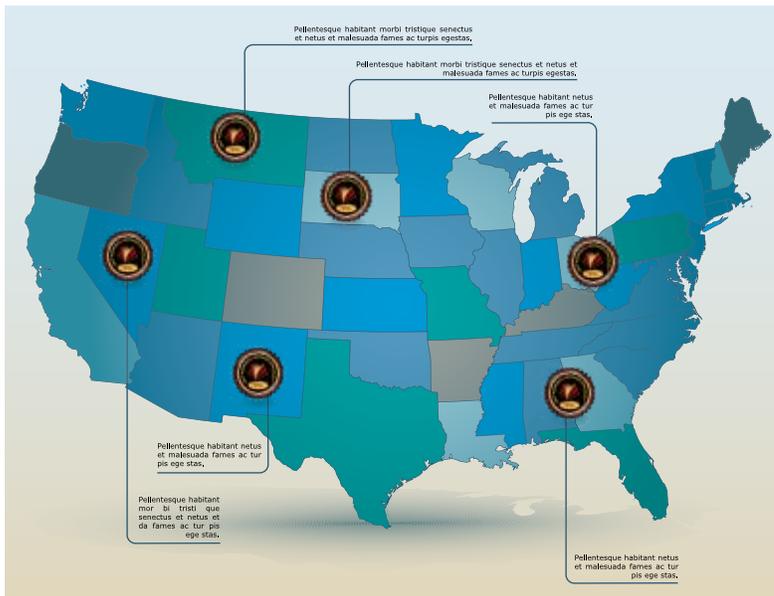
Contact Craig for:

- career opportunities
- new ventures
- expertise requests
- reference requests
- consulting offers
- job inquiries
- business deals
- getting back in touch

Contacting You
How a user can contact you depends on how he or she is connected to you:
• If a connection views your profile, he or she sees your email address
• If a user in your network views your profile, he or she sees a "Get Introduced"

3. LinkedIn

Use this powerful business network to show off your credentials to the professional community. Update your resume and qualifications on LinkedIn to reflect your status as a Self Insurance Certified Specialist®



4. Become Searchable

We have created a unique search functionality to allow the world to acknowledge your achievements. Find yourself searchable on our Self Funding Employer Association (www.SelfFundingAssociation.com). Link the certification seal on your business materials to our search functionality and specialist page and make your achievements recognized

Respond to all incoming messages from anyone inquiring about your services through our private message function for all Self Insurance Certified Specialist®. People will have the ability to inquire directly to you via email about the services you offer with the privacy of having your actual email address hidden

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SELF INSURANCE CERTIFIED SPECIALIST® COURSE AGENDA

Introduction to Self Funding ~ How to Setup a Self Funded Program

Self-funding is no longer limited to large organizations. The passage of healthcare reform has been followed by a rapid acceleration of small and mid-sized organizations electing a partial self-funding solution. These organizations have realized greater awareness of claim drivers, control over rising expenses and tax benefits. This session will address the various options available for companies to explore on an individual basis or in partnership with other like-minded organizations, along with:

- The mechanics of self funded medical vs. conventional medical insurance
- Organizations that can benefit from self-funding
- Stop Loss types
- Claims administration and management
- Laws and compliance

Sam Fleet, *President & CEO, AmWINS Group Benefits*

Take Charge of Your Future ~ A Self Funding Success Story

This session will be a case study of how several employers manage their costs under their self funded health insurance and workers compensation plans. In the session you will learn:

- Stop Loss Insurance, what it is, and decision for and against using it
- Comparisons of Fully Insured Plans versus Self Funded Plans
- How an employer can use the data of their medical plan wisely in order to tailor the self funding program and benefits to different demographics

Michael Sedgwich, *Benefits Administrator, Palm Beach County Firefighters*

Managing the Rising Costs of Biologic Drugs and Specialty Pharmacy Benefits

A major challenge and focus for employers continues to be the substantially higher cost of specialty medications – biologics and other drugs designed to treat complex medical conditions. Costs for specialty products are expected to reach 40% of employer pharmacy spend in the next 5-8 years, making it essential that effective strategies, along with plan design, are in place to support cost management efforts, improve patient outcomes and address employee productivity. At this session, you will learn about a national employer initiative to address these challenges and hear from a leading employer who recognizing the importance of managing specialty pharmacy benefits through innovation and grass roots efforts, and achieving enhanced quality of care and value through common sense approaches to case

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management, drug utilization, integrated medical and pharmacy data and cost sharing.

Cheryl Larson, *Vice President, Midwest Business Group on Health*

Sandra Morris, *Senior Manager Employee Benefits Design, Procter & Gamble*

Cost Transparency Strategies to Empower Employer Members to Influence Behavior

Greater healthcare transparency means providing employees with healthcare cost and quality information, allowing employees to make informed decisions when choosing common medical tests, procedures and other services. We'll discuss and how transparency capabilities and development strategies are driving employee awareness and behavior change.

Scott Decker, *President – Consumer Transparency Business, Cambia Health Solutions*

Brad Wolfson, *President, Safeway Health*

Why Employers are Becoming Self Insured & Its Impact

Miami Dade County Public School system is the 4th largest school system in the country with a self funded benefit program covering our 37,000 employees, dependents and retirees with expenditures of approximately \$400 million. Learn why they decided to self fund their medical and workers compensation and how they manage and run their programs. In the session you will learn:

- How to manage the administration of a self funded program
- Unique benefits offerings as a result of becoming self funded
- The risks of self insurance
- Mitigating factors to consider when making the decision to become self funded
- Examination of self insured workers' compensation programs
- Healthcare Reforms effect on self funded programs, the benefits of becoming Self Insured under the recent law

Scott Clark, *Risk & Benefits Officer, Miami Dade County Public Schools*

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How to “get it right” with your Pharmacy Benefits Plan

When it comes to pharmacy benefits plans, it pays to know the meanings behind the contract terms and conditions as well as the effects of the plans on your company’s financial bottom line. This presentation will explore common plan set ups - and provide insight to the evaluation of your PBM’s contract compliance. We will take an in-depth look at things like guarantees, “real” pass through pricing, rebates and generics. Considering the many ways to structure pricing, can your company really get a fair deal? We will discuss ways in how the experts evaluate plans including key questions you should ask your pharmacy benefits manager. Specialty pharmacy is an increasing percentage of total pharmacy costs, and will continue to grow. Learn what changes to expect as spend dynamics evolve in this market. Learn about recent major changes in the PBM environment and how they produce new challenges and opportunities for clients on the horizon. This session will help you understand – as well as help position your company for your next renewal or RFP.

Jennifer Kingsley-Wilson, *CEO, Arms Rx*

Value Based Medical & Prescription Design

Value based purchasing (VBP) is a means by which progressive employers can create an environment to stimulate the continuous improvement of the quality, safety and efficiency (i.e. value) of care. They can do this by joining with like-minded payers and providers to follow the six principles and practices of value based purchasing first published 25 years ago. In cooperation with payers and their employees, employers need to augment these VBP practices with Value Based Insurance Design. By rewarding the health conscious and more cost effective clinical decision making of their employees, dependents and retirees (whose health care costs they subsidize), employers may use VBID to enhance their VBP programs and their results, and vice versa.

Keynote Objectives:

- Understand why the ultimate goal of value-based purchasing (VBP) is to improve continuously the quality, safety and efficiency of healthcare services delivered to specific populations.
- Discuss how VBP differs from Value Based Insurance Design (VBID).
- Examine a new way of employer leadership engagement and strategic thinking in the C-Suite so that employers can continue to champion and sustain VBP and VBID
- Identify innovative strategies for employers in their enlightened self interest to be leaders in VBP and VBID.

Sandra Morris, *Senior Manager Employee Benefits Design, Procter & Gamble*

Tami Graham, *Director of Global Benefits Design, Intel*

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Legalities of Implementing Wellness Into a Self Funded Plan

This session will outline the key legal requirements that need to be considered when planning to implement a corporate wellness program. The rules and regulations required by HIPAA and ADA will be addressed, as well as the impending changes brought about by PPACA. The session will provide the knowledge and guidance needed by first time – and long time – managers of corporate wellness programs.

Gregory Viviani, *Partner, Squire Sanders, LLP*

Unique Benefit Plan Design

Advocate Health Care, a faith-based health system in Chicago provides a comprehensive health and productivity program to its over 29,000 health plan participants. A central tenant to the program is its “Health to Wealth” incentive strategy. This strategy provides a diverse offering of health management solutions that assist participants in taking their best health into retirement. Learn more about this unique benefits plan design, its risk-targeted offerings, its outcomes and its future.

- Gain insight into efforts to drive health care consumerism and bring rationality to pricing structures through benefit design incentives (and disincentives)
- Move away from standard benefit packages to create more efficient and effective designs

Kim Dwyer, *Vice President of Benefit Services, Advocate Healthcare*

Nicole Martel, *Manager of Health & Wellness Management, Advocate Healthcare*

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