

# Weekly Team Training - February 10

## Meeting Purpose

[Weekly team training on the Capstone program, focusing on performance reports and implementation processes.](#)

## Key Takeaways

- [Performance reports provide detailed insights into employee savings and employer benefits, serving as a powerful sales tool](#)
- [The program recalculates eligibility each pay period, with employees maintaining access to AMAZE benefits even if temporarily ineligible for indemnity coverage](#)
- [Implementation typically takes 30-40 days, including a 30-day AMAZE education campaign for employees](#)
- [Obtaining the census is crucial; once received, the sales process moves quickly](#)

## Topics

### Performance Report Overview

- [Displays qualified employees, potential annual tax savings, and per-pay-period savings](#)
- [Includes dropdown menu of all employees with detailed paycheck comparisons](#)
- [Shows average employee increase \(\\$14/pay period, \\$574.78/year\) and employer savings \(\\$707.54/employee/year\)](#)
- [Payroll census section provides comprehensive before/after tax breakdowns](#)

### Employee Qualification and Benefits

- [Employees requalified every pay period based on income](#)
- [If disqualified for a week \(e.g., unpaid time off\), they lose indemnity coverage for the following week but retain AMAZE benefits](#)
- [System automatically places employees in appropriate plans \(600-1500\) based on income](#)
- [Spouse and children of employee receive AMAZE benefits](#)

### Implementation Process

1. Submit completed census (typically processed within 2-3 business days)
2. Schedule performance review meeting with business owner
3. Upon approval, complete paperwork and submit to Capstone/TPA
4. Conduct kickoff call with TPA and AMAZE
5. TPA works with payroll rep to implement pay codes
6. AMAZE begins 30-day education campaign for employees

## Sales Approach and Support

- [Keep initial pitch simple, aim for Zoom call with Andrew/Al](#)
- [Obtaining census is crucial - "if you can get the census, you've got a sale"](#)
- [New training modules being developed for different stages of the program](#)
- [Best training is hands-on experience with the process](#)

## Next Steps

- [Watch for new training modules on Tax Saver platform \(50% completion target by next Monday\)](#)
- [Expect updates on RX offerings and new health program from Capstone in coming weeks](#)
- [Continue submitting cases for Plus groups while awaiting further guidance on groups under 50](#)
- [Leverage performance reports as a powerful sales tool in presentations](#)