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Printed: June 18, 2021

## *What's New and Filing Instructions*

Enclosed is the 2nd Qtr. 2021 Update Package for *Self-Insured Health Plans*—the authoritative guidebook for employers, administrators, and advisors.

This quarterly update package includes replacement pages for the Outline and Appendix. Please see the filing instructions at the end of this letter for a detailed explanation of what pages to remove and replace in your manual.

### Subscription Information

EBIA's *Self-Insured Health Plans* manual is updated quarterly.

Before you file this update, please be sure that your book is current. The box at the top of the title page in your binder should say "1st Qtr. 2021 Edition." Once you have determined that the 1st Qtr. 2021 update is in your manual, begin filing the 2nd Qtr. 2021 update, following the instructions in the table below.

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We have made numerous changes to the Outline and Appendix. Here are some highlights:

- **Eligibility**
  - In Section XIV, we have refreshed the discussion of eligibility considerations for retirees and beneficiaries (including spouses, domestic partners, and children) with additional considerations and new practical tips. And in the discussion of other rules affecting eligibility, the text box on the temporary FMLA expansion relating to COVID-19 has been updated for recent DOL FAQs.
- **Transparency**
  - Section XXIX, addressing reporting requirements, now covers the new pharmacy benefit and drug cost reporting requirements that take effect later this year. And we highlight the new rules limiting gag clauses on price and quality information in TPA and other provider agreements in our coverage of the transparency disclosure requirements in Section XXVIII, and the discussion of contracting with service providers in Section XXIII.
- **Sample Plan Document and Summary Plan Description**
  - We have revised the sample combined plan document/SPD to take into account the new rules on surprise medical billing and transparency, add a new sample provision setting forth a deadline (limitations period) for bringing legal actions for benefits, expand the non-assignability provision, and make other updates and clarifications throughout.

**Filing Instructions for Outline:**

Take Out & Toss	Insert These Pages	Take Out & Toss	Insert These Pages
Title Page, dated 1st Qtr. 2021	Title Page, dated 2nd Qtr. 2021	Outline: pages 855-856	pages 855-856
Table of Contents: pages iii-viii	pages iii-viii	Outline: pages 923-938	pages 923-938
Outline: pages 243-248	pages 243-248	Outline: pages 943-944	pages 943-944
Outline: pages 257-258	pages 257-258	Outline: pages 1025-1026	pages 1025-1026
Outline: pages 303-304	pages 303-304	Outline: pages 1031-1032	pages 1031-1032
Outline: pages 531-532	pages 531-532	Outline: pages 1559-1564	pages 1559-1564B
Outline: pages 821-824	pages 821-824	Outline: pages 1985-1986	pages 1985-1986
Outline: pages 834A-834B	pages 834A-834B	Outline: pages 1997-2032	pages 1997-2032
Outline: pages 838I-838J	pages 838I-838J	Outline: pages 2033-2034	pages 2033-2034
Outline: pages 838O-838P	pages 838O-838P	Outline: pages 2049-2054	pages 2049-2054
		Index & Glossary Tab: pages 1-14	New Index & Glossary pages 1-14

**Filing Instructions for Appendix:**

Take Out & Toss	Insert These Pages
Tab 5: pages 1-2	pages 1-2 [Updated TOC]
Tab 5: pages 81-144	pages 81-144 [Updated sample document]

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Vol. X, Issue No. 2 ♦ 2nd Qtr. 2021

***Self-Insured Health Plans***

*Self-Insured Health Plans* (ISSN 23280107) is published quarterly by Thomson Reuters/Tax & Accounting, 121 River Street, Hoboken, NJ 07030. The annual subscription rate is \$710. For subscription information, address changes, or editorial questions, please visit us at <http://support.checkpoint.thomsonreuters.com/ebia>, or call us at (800) 431-9025.

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