



**LegalShield**  
**Reconciliation and Payment Work Instructions**  
**(BEN-W008)**

Clarksville-Montgomery County School System

**1.0 WORK INSTRUCTION:**

- 1.1 Monthly statement is received via email and is forwarded to accounting. (Currently, it is emailed to Latoya.)
- 1.2 The accounting representative reconciles the bill to the participating employee payroll deductions and issues a check for payment, as appropriate.
- 1.3 When the check is issued, the check and bill are forwarded to the Benefits Office.
- 1.4 Benefits associate mails cover sheet, adjustment sheet (if needed), and check to LegalShield and retains a copy of the statement and check, notes the date that statement and payment were mailed to insurance company and files in the insurance folder.

The online version of this work instruction is official. Therefore, all printed versions of this document are unofficial copies.

**2.0 ASSOCIATED DOCUMENTS:**

**3.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
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**4.0 REVISION HISTORY:**

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/3/23		Initial Release

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