

# Notice Delivery Evidence Log

Purpose: A template log for retaining notice version, recipient, delivery, exception, and review evidence.

## At a glance

- Resource type: Template
- Resource category: Notices
- Review sensitivity: qualified-review

## Notice delivery log fields

| Field           | Record                                   | Why                      |
|-----------------|--|--------------------------|
| Notice          | Title and version                        | Supports source control  |
| Population      | Recipients or group definition           | Supports delivery proof  |
| Delivery method | Email, mail, portal, hand delivery       | Supports evidence trail  |
| Delivery date   | Date sent or made available              | Supports timing          |
| Exceptions      | Bounces, returned mail, special handling | Supports follow-up       |
| Reviewer        | Reviewer and approval date if applicable | Supports review boundary |

## Checklist

- Retain the approved notice version.
- Retain recipient population and delivery date.
- Record exceptions and follow-up evidence.
- Route late delivery, wrong population, or unapproved language.

## Review triggers

- Late delivery, unclear population, missing source version, or plan-specific notice requirements.

## Evidence examples

- Notice version
- Delivery date
- Audience list
- Delivery proof

## Template

Notice delivery row:

```
Notice/version: [notice]
Population: [recipients]
Method/date: [method/date]
Exceptions: [exceptions]
Reviewer: [reviewer]
Evidence location: [external location]
```

## Reminder

This toolkit provides educational and operating-model resources. It does not assign responsibility, manage implementation tasks, replace plan documents, or provide legal, tax, payroll, Medicare, carrier, or individualized benefits advice.

## Use this when

- A notice is distributed and the team needs proof retained externally.

## Watch for

- Late delivery, unclear population, missing source version, or plan-specific notice requirements.

## Evidence to retain

- Notice version
- Delivery date
- Audience list
- Delivery proof

## Related resources

- HRB Operating Lens
  - Five Duty Paths Overview
  - ICHRA Ecosystem SOW Template
  - Role Code Reference
  - Partner Coverage Diagnostic
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## Copyable text

Retain notice version, recipient population, delivery method, delivery date, exceptions, and reviewer notes with the external evidence file.

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