

HRB Toolkit

Start Here

HRB Operating Lens

Purpose: A guide for education, coordination, source use, and evidence retention.

At a glance

- Resource type: Guide
- Resource category: Start Here
- Review sensitivity: standard

Operating lens

Use this lens to keep HRB work organized as resource selection, source use, evidence retention, and review routing. The toolkit supports careful operating conversations; it does not replace plan documents, professional review, or external records.

- Start with the question being asked and the duty path it belongs to.
- Confirm whether the answer can stay general or needs qualified review.
- Use source-backed language and avoid promises about individual outcomes.
- Document the resource version, source trail, and review notes when applicable.

Resource selection flow

Need	Start with	Retain
Scope or role boundary	SOW + Scope Tools	Scope source, role map, reviewer notes
Employee-facing explanation	FAQ Cards or Communication Templates	Approved language, source, distribution record
Sensitive question	Review Triggers	Question, route, reviewer, final approved response
Proof or audit support	Evidence Files	Evidence file, source versions, delivery records

Checklist

- Identify the resource purpose and the duty path where the question belongs.
- Separate general education from plan-specific, tax, legal, payroll, Medicare, privacy, carrier, or individualized advice.

- Use approved source material and retain the source version used.
- Route review-sensitive questions before making commitments or final statements.
- Retain the final resource, review notes, and supporting evidence outside the toolkit.

Decision questions

- Is this a general education question or a plan-specific conclusion?
- Which duty path owns the context?
- What source supports the response?
- What evidence should be retained externally?
- Who must review before the response is used?

Review triggers

- Plan-specific interpretation, legal advice, tax advice, payroll advice, Medicare advice, carrier advice, or individualized benefits advice.

Evidence examples

- Resource version
- Source references
- Qualified review notes when applicable

Sample language

- Use HRB resources for education, coordination, and evidence retention.
- Escalate individualized or plan-specific conclusions to qualified reviewers.
- Retain the source, resource version, and final reviewed language with the external record.

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 team needs a calm starting point for using HRB operating resources.

Watch for

- Plan-specific interpretation, legal advice, tax advice, payroll advice, Medicare advice, carrier advice, or individualized benefits advice.
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Evidence to retain

- Resource version
- Source references
- Qualified review notes when applicable

Related resources

- Five Duty Paths Overview
- ICHRA Ecosystem SOW Template
- Role Code Reference
- Partner Coverage Diagnostic
- Employer Discovery Intake

Copyable text

Use HRB resources for education, coordination, and evidence retention. Escalate individualized or plan-specific conclusions to qualified reviewers.

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