



A PuzzleHR Case Study:

From Oversight to Insight: Audits-Only Service for Small Businesses

When operating a small business, careful oversight of financial expenditures is critical.

- A client with 48 employees, 29 of whom were enrolled in the company's medical benefits offering, approached PuzzleHR to assist with an audit.
- PuzzleHR's Audits Only solution provides clients with monthly benefit plan reconciliations, ensuring that invoices, plan choices, and deductions are correct. Medical, dental, and vision benefit plan reconciliations include analysis of payroll deductions, enrollment records, and carrier invoices.

The initial audit conducted by PuzzleHR uncovered a significant oversight—terminated employees had not been properly removed from carrier plans, resulting in continuous charges accruing.

- This issue affected seven employees who had been terminated for at least three months.
- The medical carrier was able to credit back 90 days, and PuzzleHR stopped the charges from continuing and recovered nearly \$12,000 back to the client.



PuzzleHR's Audits Only service is an ideal match for clients who want to ensure they're making the most of their current benefits plan.

Through diligent oversight and strategic intervention, PuzzleHR assists businesses in navigating the complexities of benefit administration, fostering sustainable financial health and operational resilience.