

Quotation Checklist ~ Group Ancillary

BASIC INFORMATION FOR ALL GROUPS

- Name of group
- Situs address (including zip code)
- Nature of business
- Requested Plan Design(s)
- Non-Contributory or Contributory (if contributory - how much % will the employer contribute towards the premium)
- Effective Date
- Due Date for the Proposal
- Census e-mailed in Excel *(very important) which includes - DOB; gender; dependent enrollment - ee, ee/sp, ee/ch, family, and home zip code

BASIC LIFE AND AD&D

- Census (benefit amounts/salaries if salaried based plan, dates of birth, gender, participation if contributory, class if more than 1 class)
- Current Rate
- Current Carrier

Experience needed for over 500 lives and should include the following:

- Rates for the last 3 years
- Volumes for the last 3 years
- Premiums for the last 3 years
- Paid claims for the last 3 years
- Plan design changes for the last 3 years
- Number of lives for the last 3 years
- If waiver of premium, list current open waivers
- Current booklet if available

LONG TERM DISABILITY

- Census (salaries, occupations, dates of birth, gender, participation if contributory, class if more than 1 class)
- Current Rate
- Current Carrier

Experience needed for over 500 lives and should include the following:

- Rates for the last 3 years
- Premiums for the last 3 years
- Paid claims for the last 3 years
- Plan design changes for the last 3 years
- List of open and closed claims
- Current booklet if available

SHORT TERM DISABILITY

- Census (salaries, occupations, dates of birth, gender, participation if contributory, class if more than 1 class)
- Current Rate
- Current Carrier

Experience needed for over 100 lives and should include the following:

- Rates for the last 2 years (3 preferred)
- Premiums for the last 2 years (3 preferred)
- Paid claims for the last 2 years (3 preferred)
- Plan design changes for the last 2 years (3 preferred)
- Current booklet if available

DENTAL

- Census (employee and dependent enrollment, home zip code)
- Current Rates
- Current Carrier
- Current plan design

Experience needed for over 100 lives (will take into consideration for groups over 100 lives)

- Rates for the last 2 years (1 minimum)
- Premiums for the last 12 months (preferably split out month by month)
- Paid claims for the last 12 months (preferably split out month by month)
- Plan design changes during the experience period
- Current booklet if available
- If group is self-funded, need month by month breakout of number of lives

Vision

- Census (employee and dependent enrollment, home zip code)
- Current Rates
- Current Carrier
- Current plan design

Experience needed for over 100 lives (will take into consideration for groups over 100 lives)

- Rates for the last 2 years (1 minimum)
- Premiums for the last 12 months (preferably split out month by month)
- Paid claims for the last 12 months (preferably split out month by month)
- Plan design changes during the experience period
- Current booklet if available
- If group is self-funded, need month by month breakout of number of lives