



Oberlin Marketing

Supporting the direction of your business

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QUOTATION CHECKLIST

Large Group

Employer Data

- Name and address including zip code of each location
- Nature of business
- If employer has more than one location, the number of employees at each zip code is needed

Current Policy and Renewal Information

- Fully insured accounts
 - Current rates
 - Renewal rates
 - Carrier name
 - Benefits covered
- Self-funded accounts
 - Current specific deductible and rates, aggregate factor, premium and contract type
 - Renewal terms, if available
 - Carrier name
 - Benefits covered
 - Description of employee's current plan. Attach current summary plan description and policy or plan document, if available.

Plan of Benefits to be Insured

If requested plan differs from the current plan, provide details of all proposed changes.

Census Data

- Provide total number of eligible employees
- Provide census of employees to be covered reflecting date of birth, sex and single/family status by zip code, preferably in an .xls file.
- Indicate those employees who are retired, COBRA participants and/or life only applicants

Claims Data

- Paid claims data for the two most recent experience periods
- Average enrollments for each experience period
- If employer is self-funded, provide month by month claim and enrollment data for the preceding 24 months
- If requesting dental, vision, prescription drugs and/or weekly income, claims paid for the preceding 24 months must be provided separately with enrollment, if different from medical

Shock Loss Data

Provide the following data for claims which exceeded 50% of the proposed specific limit or \$30,000, whichever is less, for the two most recent experience periods.

- Employee/Dependent status
- Age and sex
- Payment dates by experience periods
- Total paid claims
- Diagnosis, prognosis and treatment
- Current status and estimate of future expenses

Funding Data

- If plan is contributory, indicate amounts/percentage paid by employees
- Indicate if the plan is covered by a collective, bargaining agreement (Union/Non-Union)

Extras (Specific Rates, Plan Schedule, etc.)
