

Request for Proposals

Required Data for Market Search Self-Funded Health Insurance

Client Data:

Name	Business or Industry	Tax Status/Code
Address	Multi-Site Information	Fiscal/Budget Year
Telephone & Fax	Benefits Offered	Effective Date
Primary Contact	Plan Contribution	Employee Classification

Census:

Gender	Age or Date of Birth	Coverage Status
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On census there must be an identifier if there are separate classes of employees.

Benefit History:

Copy of the current SPD or plan document including any plan amendments or contract changes within the most recent three year period. Copy of the current reinsurance contract identifying the specific, aggregate and contract period.

Claims History:

Three years of group experience data including premium versus claims with identifiers of large loss claims meeting 50% of the specific deductible or exceeding aggregate. For large claims, data should include gender, diagnosis, prognosis, incurred & closure date and amount of claims paid. Medical claims may be separated into expense categories, i.e. inpatient, outpatient, pharmacy, etc.

Plan History:

Identify current carriers/payors for each line of coverage for the most recent three year period. Note reason for change in carrier or payor, if any. Also provide fixed costs and reinsurance costs for same time period. Identify specifics to pharmacy contract as well as any received rebates.

Goal or Intent of Client:

Identify needs and desire to enhance plan performance and services received.

Request for Proposals

Required Data for Market Search Large Group Ancillary Coverage's

Client Data:

Name	Business or Industry	Tax Status/Code
Address	Multi-Site Information	Fiscal/Budget Year
Telephone/Fax	Benefits Offered	Effective Date
Primary Contact	Plan Contribution	

Census:

Gender	Age or Date of Birth	Coverage Status
Salary	Occupation or Title	

On census there must be an identifier if there are separate classes of employees.

Benefit History:

Copy of the current SPD or plan document including any plan amendments or contract changes within the most recent three year period. Need copy of the current ASO or fully insured contract identifying funding arrangements.

Claims History:

Three years of experience data including premium versus claims with identifiers of large or on-going claims. Also provide rates or rate schedule.

Plan History:

Identify current carriers for each line of coverage for the most recent three year period. Note reason for change in carrier or payor, if any. Also provide fixed costs and reinsurance costs for same time period.

Goal or Intent:

Identify needs and desire to enhance plan performance and rendered services.