



Information Necessary for Large Group & Self Insured RFP process

MEDICAL

1.	Copy of Plan Booklet (if benefits have changed in last 24 months, provide both booklets).
2.	Minimum - Most recent 24 months claims history (<i>prefer 36 months or more if available</i>).
3.	Minimum - Most recent 24 months enrollment counts (<i>prefer 36 months or more if available</i>).
4.	Copy of 3 most recent billing statements.
5.	Large claim information: anyone with claims over \$10,000 in the last 24 months. *We do not need names but do need diagnosis, prognosis and total dollar amounts.
6.	Census information to include employees' DOB, gender, plan elections (single, family, etc.), date of hire, and home zip code. Also indicate COBRA participants and effective date as well as retirees being covered under the plan.
7.	Employer contribution strategy.

LIFE

1.	Copy of Plan Booklet.
2.	Copy of most recent 3 months bills.
3.	Most recent 24 months claim experience (<i>prefer 36 months or more if available</i>).
4.	Census that includes all the above information plus annual salaries if life amount is a function of salary.

Disability

1.	Copy of Plan Booklet.
2.	Copy of most recent 3 months bills.
3.	Most recent 24 months claim experience (<i>prefer 36 months or more if available</i>).
4.	If anyone is currently disabled, need medical diagnosis & prognosis, return to work date, if applicable.
5.	Same census data as above plus annual salaries and occupations.

Dental

1.	Copy of Plan Booklet.
2.	Copy of most recent 3 months bills.
3.	If applicable, most recent 24 months claim experience (<i>prefer 36 months or more if available</i>).

401K

1.	Number of participating employees.
2.	Amount of employer matching funds.
3.	Annual contribution by employees.
4.	Current assets in the plan.
5.	How long with current administrator and fee schedule.
6.	Copy of the Plan Document.
7.	401K brochure that is given to the employees.
8.	Annuity based or mutual fund?