



### RFP Checklist

- Legal Employer Name and Address
- Census File in Excel
  - Employee Zip Codes
  - Employee Dates of Birth
  - Employee Genders
  - Employee Coverage Tiers (Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family)
  - Employee Plan Selections if Multiple Plans
  - Retiree Elections if Applicable
  - COBRA Elections if Applicable
- Full Plan Designs for All Plans
- Current Insurance Rates & Contract Terms (ask for current contract)
- Claims Data (for all fully insured groups over 100 employees and ALL self funded groups)
  - 2-3 years of Monthly Paid Claims (total Medical and Rx by month)
  - 2-3 years of Monthly Enrollment
  - 2-3 years of Large claims data with diagnosis (if available)
  - If available – any clinical reporting – precert, pended claims, trigger diagnosis report, case management reports
- Requested Networks
- Ask for 5 day turnaround on RFP's