

New Business Quote Checklist

To follow is a list of standard items required for RFP.

Documentation of the name of current carrier, current rates, aggregate factors, contract types, and commission level. Renewal information, if available.

An eligibility listing including name, date of birth, gender, dependent status, zip code and breakdown of PPO network by location.

A copy of the final, signed Plan Document or current schedule benefits.

Any proposed benefit changes or changes that have occurred over the past few years.

If aggregate coverage is requested, provide month by month paid claims and corresponding headcounts including amounts to “net” out of claims over the specific deductible for at least the past two policy periods. Pending claim report if available. MINIMUM OF TWO YEARS, MORE IF AVAILABLE.

Detailed information on shock claimants. This information should include: name, date of birth, paid/pending amounts, diagnosis, detailed prognosis, current and proposed treatment plans, an estimate of future costs, and any available LCM reports. MINIMUM OF TWO YEARS, MORE IF AVAILABLE.

If the TPA is not currently approved with TRU Services, LLC, please forward a TPA questionnaire that has been completed in the past six months. Be sure that documentation of current E & O and Fidelity bonds is attached. Also, a list of other MGUs/Carriers who have approved the TPA including the number of sold cases with each should also be included.

Proposed Effective Date

Nature of Business / SIC Code

Locations of headquarters

Employee Breakdown by Zip Code (first three digits) and PPO network

Name of current and proposed TPA

Name of current and proposed PPO

Requested specific levels

Requested Contract Types

Requested Commission level