



In order for us to properly research the market for group health coverage and employee benefits, a few items are needed. Below is a checklist that will help expedite the process whether you are looking to implement a new group plan, review a market analysis, or are looking to explore alternatives during your renewal period.

CHECKLIST:

New Group Plan:

- Census – includes all full time employees on payroll working 25-30 hours or more a week. Their gender, date of birth, dependent status and Zip Code must be included. Ask us how you can include 1099 subcontractors.

Market Analysis:

- Census – includes all full time employees on payroll working 25-30 hours or more a week. Their gender, date of birth, dependent status and Zip Code must be included. Ask us how you can include 1099 subcontractors.
- Summary of Benefits – Current plan design that indicates co-pays, deductibles, co-insurance, etc.
- Current Invoice – Current cost of insurance

Group's Up for Renewal:

- Census – includes all full time employees on payroll working 25-30 hours or more a week. Their gender, date of birth, dependent status and Zip Code must be included. Ask us how you can include 1099 subcontractors.
- Summary of Benefits – Current plan design that indicates co-pays, deductibles, co-insurance, etc.
- Invoice – Current cost of insurance
- Renewal Rates from Current Carrier and/or Alternate Plan design– possible rate increase or decrease coupled with alternate plan options within current carrier