

Before you request a quote, make sure you've gathered the right info based on the group's size and situation. This checklist will help you send a clean, complete submission—so we can get you pricing faster.

What to Include in Every Submission

- ☐ Group name, address(es), SIC code
- ☐ Requested effective date
- ☐ Indicate "Current Client" or "Prospective Client"
- ☐ Census (Excel format) of eligible employees and dependents
 - Include:
 - First and Last Name
 - Date of Birth
 - Gender
 - ZIP Code
 - Coverage Tier (employee-only, EE+spouse, etc.)
- ☐ Current and renewal rates and benefits
- ☐ Current medical plan invoice or renewal file from carrier including covered employees
- ☐ [Individual Health Questionnaires \(IHQs\)](#) Required for groups with 15 or fewer currently enrolled employees
 - May be requested for groups 15-25 depending on initial underwriting
 - Required for any sized group if no current coverage is offered
 - Valid for 45 days, most commonly used IHQ forms accepted
 - Claims will be accepted in lieu of IHQs
- ☐ [Group Risk Evaluation Form](#) (Waived if IHQs were provided)
- ☐ Claims experience for groups that are self-funded, level-funded, or have over 100 enrolled (whenever it is available)
 - 12 months of claims history
 - large claims report with diagnosis information
 - Produced within last 45 days
- ☐ Requested commissions (if non-standard)



Submission Instructions

Email all materials to:

quotes@emihealth.com

- Be sure to CC your Account Executive/Sales Manager for tracking and follow-up.
- If working through a General Agency, send through their preferred submission process.

Quick Tips for Fastest Turnaround

- ✓ Send Excel files for the census
- ✓ Use most current forms (ask us if unsure)
- ✓ Reach out with any missing info as soon as possible

