QUOTING AND SUBMITTING A CASE

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

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