

# Self-funded Solutions Checklist

## 100+ Employees

## Under 100 Employees

### Company specific information

Company name  
 Company address  
 Industry or SIC Code  
 Advisor Compensation

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### Current/Expiring plan information

Plan effective date  
 Plan design and rates (2-3 years)  
 If moving off anniversary, what is the current effective date?  
 Premium rate tier structure

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### Current census with enrollment levels

Spreadsheet including:

1. Age
2. DOB
3. Gender
4. Zip code

\*\*By employee, plan and enrollment tier.  
 \*\*If member census is not available, we will need IMQs.

### Current census with enrollment levels

Spreadsheet including:

1. Age
2. DOB
3. Gender
4. Zip code

\*\*For employee and dependents.  
 \*\*By employee, plan and enrollment tier.  
 \*\*If member census is not available, we will need IMQs.

### Renewals

3 years of renewals

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### Carrier Reporting

2-3 years of data  
 Active members enrolled by month  
 Medical claims by month  
 Rx claims by month

### Large claimant information

Claimants with \$25,000 or more in claims or that exceed 50% of the Specific Deductible

Context around large claimants, past or present, if diagnosis, prognosis, expected course of treatment is available

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