Quartz

LARGE GROUP NEW BUSINESS SALES CHECKLIST

Groups with Applications, More Than 50 Employees Enrolled

Requirements for Preliminary Quotes

- ☐ Completed Large Group request form
- ☐ Excel Census, including Date of Birth (DOB) or Age, Gender, Zip Code, Coverage Type
- ☐ Summary of Benefits and Coverage (SBC) for all current plans
- ☐ Total Number of Employees of All Locations/Subsidiaries Being Insured _____
- ☐ Current Rates (if applicable)

Nice to Have

- ☐ Renewal rates

Requirements for Final Rates

- ☐ Completed Large Group request form
- ☐ SBC for all current plans
- ☐ Complete member applications
- ☐ Employer Group Application
- ☐ Centers for Medicare & Medicaid Services (CMS) Survey
- ☐ Current Rates (if applicable)
- ☐ Prior Carrier Bill (if applicable)

Nice to Have

- ☐ Wage & Tax
- ☐ Renewal Rates
- ☐ Renewal Rate History
- ☐ Medicare eligible members

Special Populations

- ☐ Union Agreement language
- ☐ Retiree language
- ☐ Leave of Absence provisions
- ☐ Medicare coverage tier delineation language
- ☐ COBRA enrollment

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