



Large Group (51+) RFP Checklist

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1. Group Demographics:
 - Name of Group
 - Address
 - SIC and Industry

2. Group Census
 - Gender
 - Relationship Tier (EE, ESP, ECH, FAM)
 - Age or DOB
 - Current Plan
 - Employee Zip codes

3. Employer Contribution for Employees and Dependents

4. Commission Requested

5. Carrier Renewal

6. Claims (2 years)
 - Groups 50-99 -> 2 years aggregated claims (DOI Report)
 - Groups 100+ -> 2 years with prognosis and diagnosis with membership by Month

7. Current Plan design (SOB or SBC)

8. Current Carrier

9. Strategy (What is the goal of the RFP?)