



## Quoting Checklist

In order to generate a quote, we require the information below.

- Legal name of employer and state where headquarters is located
- Total full-time employees (working 30 or more hours per week, year round)
- Total number of eligible employees expected to enroll in coverage
- Census file, including the following information for employees and dependents expected to enroll in coverage with Gravie:
  - First and last name
  - Date of birth
  - Gender
  - Zip code
  - Medical plan election (if not currently enrolled, indicate 'waive')
- Please include the following for all medical plan designs and coverage tiers currently offered:
  - Premiums
  - Contributions
  - Summary of Benefits and Coverage (SBC)
- Current health carrier and health carrier renewal date
- Renewal document, including renewal premiums and plan designs
- Claims history:
  - Claims and enrollment by month for 2 years (or more if available)
  - Large claimant report (any claims over \$25,000) for 2 years (or more if available), with diagnosis/prognosis and current enrollment status of each individual on the report
- (Optional): We can provide GeoAccess or Disruption Reports upon request.

Once all the necessary information is submitted, it will take 8-10 business days to underwrite and provide a quote.

**We look forward to working with you!**

