

# Quoting Checklist

In order to generate a quote, we require the following information:

- 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')
  - Coverage tier if currently enrolled (EE, ES, EC, F)
- Please include the following for all medical plan designs and coverage tiers currently offered:
  - Premiums (if age-banded, provide full premium chart or most recent invoice)
  - Contributions
  - Summary of Benefits and Coverage (SBC)
- Current health carrier and health carrier renewal date
- (Required to finalize rates only): Renewal document, including renewal premiums and plan designs
- Claims history:
  - Monthly claims and enrollment for the most recent 24 months (minimum requirement: 12 months)
  - Large claimant reporting that aligns to monthly experience provided and includes diagnosis, treatment plan, claimant status, and prescribed medications (minimum requirement: large claimant-paid amounts only)
- (Optional): We can provide GeoAccess or Disruption Reports upon request.



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

Have Questions?

Call: 844.540.8701

Email: [info@gravie.com](mailto:info@gravie.com)