



BlueCross BlueShield of Oklahoma

A Member of the Blue Cross and Blue Shield Association,
an Association of Independent Blue Cross and Blue Shield Plans.

RATE QUOTATION CHECKLIST

Thank you for the opportunity to develop a proposal for your group benefits. The following information will help us provide a competitive quote. This checklist will assist you in gathering the necessary data.

1. Name and address of the parent company and any subsidiary or affiliate companies to be covered.
2. Location of the business and/or subsidiaries.
3. Specific nature of the business/industry.
4. Census information for **all employees** (both full- and part-time), retirees covered by the plan and any individuals receiving benefits under the Consolidated Omnibus Budget Reconciliation Act (COBRA). Census should indicate the following information for each employee, retiree or COBRA participant:
 - (a) Male/female
 - (b) Date of birth or age
 - (c) Location (if business has multiple sites)
 - (d) Whether the individual is covered by the current plan, and if so, the enrollment status (single, family, etc.)
 - (e) Whether the individual is receiving benefits under COBRA when the COBRA eligibility period terminates
 - (f) For short- and long-term disability insurance quotes, also include job titles and hourly or monthly pay
5. Brief description of current health benefits and carrier name.
6. Completed Group Appraisal Form or similar document indicating that questions on the Group Appraisal Form have been asked and answered. (Agent signature on the Group Appraisal Form is sufficient to obtain a contingent quote. Group signature is required at time of sale when binding of coverage is requested.)
7. Current rates (including most recent group bill and renewal notice if available).
8. Waiting period for new hires.
9. Employer contribution toward coverage:
Single _____ Dependent _____

We recognize every item on this list may not be available to you. Please provide as much information as you can so we can calculate the most competitive rate possible for your account. If you have questions, please contact your Blue Cross and Blue Shield of Oklahoma account executive.