

## RFP Checklist

Thank you for considering iisi, a division of Companion Life Insurance Company for your employer stop loss needs. Below is a checklist of information we need to provide a quality, timely proposal with accurate terms. We look forward to working with you!

- Contract/coverage terms  
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- Current census (which minimally includes employee DOB, gender, home zip code, coverage tier, and status)  
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- Current Schedule of Benefits or Benefit Plan Document(s)  
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- Complete prior and current year aggregate and large claim reports  
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- Complete 2nd prior year aggregate and large claim reports (if available)  
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- Complete prior and current year detailed Rx/PBM reporting by individual  
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- Available case notes or clinical synopsis on potential and ongoing claimants  
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- Current pre-cert report for last 90 days and future dates  
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- Current pending/denied report  
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- Current trigger report  
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- PPO savings report, if available  
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Please submit RFPs to your Regional Marketing Director noted below, or by visiting [www.iisinet.com/get-a-quote](http://www.iisinet.com/get-a-quote).

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