



RFP Checklist

- Contract/coverage terms

- Current census (which minimally includes employee DOB, gender, home zip code, coverage tier & status)

- Current Schedule of Benefits or Benefit Plan Document(s)

- Complete prior and current year aggregate and large claim reports

- Complete 2nd prior year aggregate and large claim reports (if available)

- Complete prior and current year detailed Rx/PBM reporting by individual

- Available case notes or clinical synopsis on potential and ongoing claimants

- Current pre-cert report for last 90 days and future dates

- Current pending/denied report

- Current trigger report

- PPO savings report, if available

