



## ***Information Required for Health Insurance Analysis***

- Copy of most recent Billing Statement
- Paid premium versus claims by month for past 12 months (24 mos. if available) as well as monthly populations
- Copy of this year's renewal letter
- Copy of Schedule of Benefits
- Census showing name, date of birth, gender, insurance coverage (i.e. Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family), salary, occupation, residence city and zip code – This list should also include any individual on COBRA
- On census, if an employee covers their dependents need name, gender and date of birth for each dependent listed separately underneath the employee (see attached census sample)
- Corporate location(s) (city and zip code)
- Employer contribution
- List of any large claims over \$15,000 depersonalized showing diagnosis and prognosis or brief description of same
- What other Employee Benefit plans are in place such as Life/A&D, Dental, Vision, Short Term Disability or Long Term Disability?
- Are there any classes of employees excluded?

*>50 Group Analysis*