

Information Needed to Obtain a Quote

Please Send the Following Details to jludwig@ims-tpa.com

General Information

- Company Name
- Industry Name (SIC Code)
- Location(s)
- Number of Employees
- Desired Specific Deductible(s)
- Contract Basis
- Commissions Required
- Effective Date
- Aggregate Coverage Required
- Benefits Required
- Additional Miscellaneous Requests

Census Information

- DOB or Age
- Sex
- Single/Family Medical Coverage
- Zip Codes if more than one location

Aggregate Quote Information

- Past 9 months of monthly paid claims
- Prior 12 months of monthly paid claims
- Include all corresponding enrollment figures
- 24 months of data is preferred
- If Group is Self-Funded, 24 months of data is required

Itemization of Shock Claims

- Individuals with claims in excess of the lowest Specific Deductible over the past three policy periods (minimum two years)
- Most recent policy period should include information on individuals with the potential to exceed the lowest Specific Deductible
- The most recent policy period should include claim details—diagnosis, prognosis, and future treatment

Groups Transitioning to Self-Funding from Fully Insured

- All standard information is needed to quote as above
- All claims experience must be provided if available (state/carrier specific)
- Fully insured current rates and renewal rates are required*

**Quote can be issued with current rates only, but will be subject to receiving renewal rates*