

Key Accounts broker checklist

Requirements for submissions

At UnitedHealthcare, we are committed to offering you great service throughout the quoting process. To help us provide you with a quick turnaround time on your quotes for clients with 100 or more employees, we have created a quote submission checklist for your convenience. This checklist is a comprehensive guide to the documents and information our Underwriters need to provide you with the most competitive quote possible within a reasonable turnaround time. While use of this checklist is optional, we recommend you become familiar with our requirements to ensure we meet your needs in a timely fashion. Thank you for considering UnitedHealthcare.

Group Information

- Group Name
- Street Address, City, and Zip Code for all locations
- Effective Date
- Industry (SIC Code)
- Number of Eligible Employees
- Participation Percentage
- Employer Contributions (Employee, Dependant, Family, Other)
- Three Years of Carrier History (Carrier names and number of years with each Carrier)

Census Information in Excel Format

- Date of Birth
- Gender
- Coverage Type/Status (Employee, Employee + Spouse, Employee + Child, Family, Waiver)
- Status (Active, COBRA, Early Retiree, Retiree, Not Eligible, etc.)
- Plan Election (HMO, PPO, Indemnity, Waived, etc.)
- Home Zip Code

Broker of Record Information

- Broker Firm
- Broker Name
- Address
- Phone Number
- Commission for all products requested

Current & Renewal Plan & Rate Information

- Carrier
- Benefit Summaries including In and Out of Network benefit information
- Enrolled
- Quoted
- Current Rates & Renewal Rates
- Ancillary offerings
- Additional requirements for Self Funded requests
 - Aggregate Stop Loss level (%)
 - Aggregate Factors
 - Specific Stop Loss amount (\$)
 - Specific and Aggregate Premiums
 - Claims Basis
 - Administration Fees

Claims Information

Please provide a 24 month tally to include:

- Pregnancies
- Hospitalizations or Disabilities
- High and ongoing claims

UnitedHealthcare Employer Application

- If your client chooses UnitedHealthcare for their needs, we also require that the UnitedHealthcare Employer Application be completed, signed, and dated by your client.

