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Census Data:

1. Census in an Excel format. I have attached a blank census form for the ease of entry. If they already have one in their own excel format that is fine. We need it to include Residence Zip Code, Date of Hire, Date of Birth, Gender, Effective Date of Benefits, Occupation and Health and Dental Coverage Election.
2. If currently more than one plan is offered, we would need the census to indicate participation by plan.
3. Separate out any Retirees or COBRA participants. For Retirees we need to know if Medicare is primary or secondary and what the eligibility rules are for Retirees. For COBRA we need the initial effective date of COBRA coverage.
4. Identify any one currently out on disability.

Company Data:

1. Name of Hospital and physical address,
2. If multiple locations give address of each location, and
3. Ownership of Hospital.

Current Benefit Information:

1. Copy of the Schedule of Benefits for each plan,
2. Current or preferred PPO arrangements,
3. Domestic reimbursement arrangements, and
4. Identify any proposed design changes.

Claims information:

1. If currently self-funded:
 - a. Specific and Aggregate reports for 3 years including current,
 - b. 50% of Specific large loss report for all 3 years,
 - c. For large loss claimants in current year include diagnosis/prognosis,
 - d. Current Stop Loss contract information including, carrier, rates, specific deductible levels and contract perimeters (Paid, 18/12, 15/11, etc), and coverages included in contract (Medical, Rx, Dental).
2. If currently fully insured:
 - a. Claims reports for 3 years including current,
 - b. Any large claimants they have knowledge of including diagnosis and prognosis,