

Health Insurance Quote Request Form



**Thank you for your interest in our program.
In order to obtain a quote, our carriers require all sections of this form be completed.**

Company Information:

Company Name:	Current Insurer:
Contact Person:	Trust / Program:
Address:	Renewal Date:
City, State, Zip:	How long have you been with your Current Insurer?
Nature of Business:	Current Broker:
Phone:	Are you a member of a trade association? <input type="checkbox"/> Yes <input type="checkbox"/> No
Fax:	If yes, please specify :
Email:	Membership ID# Member Since:

How did you hear about the MBA Health Trust?

Cold Call Health Trust Website Referral Membership Event Advertisement Other (Please Clarify): _____

I authorize the Trust Consultants (Benefit Services Northwest) to provide our company with a proposal for the Trust.
 Authorized Representative: _____ Date: _____

Please include the following information:

Census - Please include all full-time, active, eligible employees and dependents							
Employee Name	Date of Birth	Waiving Coverage Y/N?	Zip Code	M/F	Dependent Name (Spouse/Child(ren))	Dependent Date of Birth	Zip Code

Please attach additional census, if necessary

- Billing Statement** - Please provide your most recent billing statement.
- Current Benefits** - Please provide information on your current employee benefits (medical, dental, vision, life, etc.)
- Renewal Information** - If applicable, please provide your renewal rates for the upcoming plan year.
- Transition of Care Form** - See back
- Claims information** - If available

Please send completed forms to:
 Scott Keno - Benefit Services Northwest
 2107 E Huckleberry Lane, Spokane, WA 99224
 Phone: (509) 863-6500 / Fax: (509) 448-4451
 skeno@epkbenefits.com

We look forward to serving your company's benefit needs

Transition of Care Questionnaire

Please answer each question, to the best of your knowledge to ensure a smooth transition of care for all prospective enrollees, including: owners, employees, spouses, dependent children, domestic partners and COBRA participants. This form is elective.

1. Does your company offer wellness programs for your employees? **Yes** **No**

If so, please check those that apply below:

- Drug/alcohol screenings On-site flu shots Preventive safety classes
 Blood glucose screenings Blood Pressure Checks Smoking cessation programs
 Other: _____

2. Are there any prospective enrollees being treated by specialty providers and/or facilities who would require coordination of care? **Yes** **No**

If so, please specify providers and/or facilities so we may ensure there is no disruption of care:

3. Are you aware of any specialty medications utilized by prospective enrollees that would require a prior authorization? **Yes** **No**

If so, please specify medications so we may ensure there is no disruption of care:

4. Are there any prospective enrollees on COBRA continuation coverage?

Yes **No** If so, how many? _____

By completing this form I certify that the above information is correct to the best of my knowledge. This is not an application for coverage. Any group insurance coverage will not be effective until a proposal is provided, applications are completed by the group and its employees and coverage is approved by the carrier.

Name of Individual Completing Form

Title

Signature

Name of Company

Date