PRESBYTERIAN

Presbyterian Health Plan
Presbyterian Insurance Company, Inc.

Quote Deadline and Sold Case Submission Information
2012

Quote Deadline: The last day to submit requests for quotes (RFQ) is 15 working days before the effective date. ***Note:** The dates below are average timeframes. If the 25th or the 9th of the month falls on a non-working day, use the next working day.

If…	Then…	Example:
The effective date is the first of the month	RFQ submission is required prior to the 9th of the previous month.*	March 1st effective date requires RFQ submission prior to February 9th.
The effective date is the 15th of the month,	RFQ submission is required prior to the 25th of the previous month.*	February 15th effective date requires RFQ submission prior to January 25th

Sold Case Deadline and ID cards: The last day to submit sold case paperwork is 5 business days prior to the effective date. If Sold Case paperwork is submitted after the required date, the original desired effective date will be moved to the next available effective date. Groups will have ID cards prior to their effective date if complete sold case paperwork is submitted 10 business days prior to the effective date.

If…	Then…	Example:
If you require ID cards by the effective date	complete sold case paperwork is due **10** full work days before the effective date.	February 15th effective date requires submission of the sold case paperwork prior to February 1st.
If you do not require ID cards by the effective date	complete sold case paperwork is due **5** full work days before the effective date, no exceptions.	February 15th effective date requires submission of the sold case paperwork prior to February 8th.

Required Paperwork: To be considered a complete Sold Case submission, the following paperwork is required:

- SUTA or current Tax filing
- If not part of the SUTA or current Tax filing, submit a list of all employees on company letterhead. The status should be indicated for each employee; termed (T), enrolling (E), waiting period (WP), part-time (PT), waiving with valid other coverage (OC), waiving without valid other coverage (NC)
- First month's premium check with company address that is the same address as on the SUTA – may be submitted with signed contract and rate sheet
- Bank Draft Authorization Form (Exhibit B) for groups with 2-9 employees enrolling – may be submitted with signed contract and rate sheet
- Universal/Uniform Medical Assessment Forms (UMAFs) that have all questions answered and details entered on the 2nd page for all "Yes" answers and are signed and dated within 90 days of the effective date
- Employee Action Forms for all employees enrolling with all sections completed
- Employee Action Forms for all employees waiving coverage with name of employer and insurance company