

# SELF-FUNDED BROKER TOOLKIT & QUOTING GUIDE

As a valued broker with exclusive access to Savvion Health Self-Funded plans, enclosed is a product toolkit intended to simplify your interactions with Savvion Health. Save this document as your single source for quoting, promoting, and submitting Self-Funded.

## **SELF-FUNDED: QUICK REFERENCE INFORMATION**

[Savvion Health Self-Funded Brochure](#)

[Employee Enrollment - Self-Funded Medical Coverage](#)

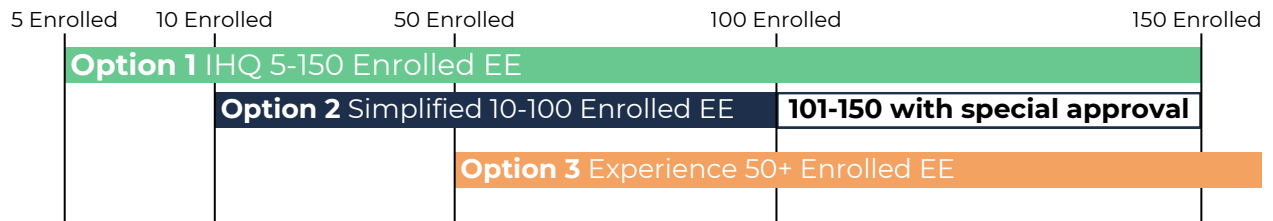
[Self-Funded Employer Risk Assessment Form](#)

[Submission Request Form](#)

[Employee/Employer Census Spreadsheet](#)

# QUOTING CHECKLIST

Up to (3) quoting options are available depending on your group size.



## IHQ

**5-150 Enrolled EE**

# 1

- [Savvion Health Submission Request Form](#)
- [Savvion Health IHQ Employee/Employer Census Spreadsheet](#)
- Renewal or current bill
- Current plan design/SBC (optional)

Note: The IHQ process is the only option for groups with 5-9 enrolled employees.

## SIMPLIFIED

**(no IHQ) 10-100 Enrolled EE**

# 2

- [Savvion Health Employer Risk Assessment Form](#)
- Renewal and current bill
- SBC/plan design

Note: The SIMPLIFIED process is available to groups with 10-100 enrolled employees with no claims experience.

## EXPERIENCE

**50+ Enrolled EE**

# 3

- [Savvion Health Submission Request Form](#)
- [Employee/Employer Census Spreadsheet](#)
- Renewal and current bill
- SBC/plan design
- Monthly paid claims, including pharmacy, and corresponding enrollment for prior 24 - month period
- Claims above the 50% specific deductible
- Current schedule of benefits
- Current and renewal rates

Note: The EXPERIENCE process is available to groups with 50 or more enrolled employees.