

Group Health Questionnaire (page 1 of 4)

This questionnaire must be filled out completely. Please be sure to indicate "None" if applicable.
 < > will not accept the questionnaire if incomplete. Use additional paper if necessary.

Date _____

Proposed Effective Date: _____

I. COMPANY AND CURRENT ENROLLMENT INFORMATION					
Company Name					
Street Address					
City		State		Zip	
County		Benefits Contact & Phone #			
Total Number of employees on payroll:	Total Full Time: Total Part Time:		Total Number of employees currently enrolled in health care plan:		
Are any health plan enrollees NOT paid employees (other than spouses or children)? <input type="checkbox"/> Yes <input type="checkbox"/> No ***If yes, please provide names and details:					
Current Health Carrier:			Health Carrier Renewal Date: / /		
Is your current Plan Self-Funded? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know ***If yes, please provide claims.					
Are you currently with a PEO? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, name of PEO:			Any ineligible class of employees <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, which class:		
Please provide a complete description of your business operation:				SIC Code:	
Number of Locations: _____		Please identify all states of operation: _____			

A. List any current COBRA / State Continuation participants: ☐ NONE

Name / DOB / Phone # of Individual	COBRA / Continuation Effective Date	Activating Event / Date (i.e. employee termination, etc.)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. List any participants currently eligible for COBRA who have not yet elected coverage and/or any participants who will become eligible for COBRA prior to the Health Plan effective date: ☐ NONE

Name / DOB / Phone # of Individual	Date Eligible	Activating Event/Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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II. CURRENT PLAN CONTRIBUTION INFORMATION (Does your company have more than one Contribution Level? If so, please list each separately)				
	Employee Only	Employee + Spouse	Employee + Child	Family
Company Contribution Levels (\$ or %)				
Company Contribution Levels (\$ or %)				

III. RATE HISTORY & PLAN DESIGN DETAILS (include the 3 most elected plans)					
Plan 1 Name: _____	# Enrolled _____	Renewal Rates (eff. __/__/__)	Most recent 12 months	13-24 Months Prior	<input type="checkbox"/> HMO <input type="checkbox"/> PPO <input type="checkbox"/> HDHP <input type="checkbox"/> POS <input type="checkbox"/> _____
		Premium Rates			Plan Design Details
Employee Only	#	\$	\$	\$	Annual Deductible \$ _____
Employee + Spouse	#	\$	\$	\$	Co-Insurance % _____
Employee + Child(ren)	#	\$	\$	\$	Out of-Pocket Max\$ _____ (excluding ded.)
Employee + Family	#	\$	\$	\$	Office Visit Copay \$ _____
					Prescription Drugs __/__/__

Plan 2 Name: _____	# Enrolled _____	Renewal Rates (eff. __/__/__)	Most recent 12 months	13-24 Months Prior	<input type="checkbox"/> HMO <input type="checkbox"/> PPO <input type="checkbox"/> HDHP <input type="checkbox"/> POS <input type="checkbox"/> _____
		Premium Rates			Plan Design Details
Employee Only	#	\$	\$	\$	Annual Deductible \$ _____
Employee + Spouse	#	\$	\$	\$	Co-Insurance % _____
Employee + Child(ren)	#	\$	\$	\$	Out of-Pocket Max\$ _____ (excluding ded.)
Employee + Family	#	\$	\$	\$	Office Visit Copay \$ _____
					Prescription Drugs __/__/__

Plan 3 Name: _____	# Enrolled _____	Renewal Rates (eff. __/__/__)	Most recent 12 months	13-24 Months Prior	<input type="checkbox"/> HMO <input type="checkbox"/> PPO <input type="checkbox"/> HDHP <input type="checkbox"/> POS <input type="checkbox"/> _____
		Premium Rates			Plan Design Details
Employee Only	#	\$	\$	\$	Annual Deductible \$ _____
Employee + Spouse	#	\$	\$	\$	Co-Insurance % _____
Employee + Child(ren)	#	\$	\$	\$	Out of-Pocket Max\$ _____ (excluding ded.)
Employee + Family	#	\$	\$	\$	Office Visit Copay \$ _____
					Prescription Drugs __/__/__

- Attach a copy of your benefit summary for each plan and year listed above.
- Include carrier claims report if available.

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Next, please answer the following questions on behalf of your company to the best of your knowledge. It is not necessary to transfer information from Personal Health Questionnaires. You may include additional sheets for detailed explanations.

IV. SERIOUS ILLNESS / CONDITION QUESTIONS:							
A. Has anyone been treated for a serious illness, been hospitalized or had surgery in the past 5 years?						To the Best of My Knowledge <input type="checkbox"/> YES <input type="checkbox"/> NO	
B. Is anyone currently hospitalized, confined at home, incapacitated, confined in a treatment facility, incapable of self-support because of physical or mental disability?						<input type="checkbox"/> YES <input type="checkbox"/> NO	
C. Has anyone been advised that medical treatment, diagnostic testing, surgery or hospitalization is necessary? <i>(If yes to any, please provide details in the table below.)</i>						<input type="checkbox"/> YES <input type="checkbox"/> NO	
D. Is anyone currently being treated or been advised to seek treatment for any of the following?							
Please check all that apply:							
<div style="display: flex; flex-wrap: wrap;"> <div style="width: 33%;"><input type="checkbox"/> AIDS or testing HIV Positive</div> <div style="width: 33%;"><input type="checkbox"/> kidney disorder</div> <div style="width: 33%;"><input type="checkbox"/> stroke</div> <div style="width: 33%;"><input type="checkbox"/> arthritis</div> <div style="width: 33%;"><input type="checkbox"/> liver disease</div> <div style="width: 33%;"><input type="checkbox"/> substance dependency</div> <div style="width: 33%;"><input type="checkbox"/> back disorder</div> <div style="width: 33%;"><input type="checkbox"/> mental illness</div> <div style="width: 33%;"><input type="checkbox"/> transplants</div> <div style="width: 33%;"><input type="checkbox"/> cancer</div> <div style="width: 33%;"><input type="checkbox"/> muscular disorder</div> <div style="width: 33%;"><input type="checkbox"/> tumor</div> <div style="width: 33%;"><input type="checkbox"/> diabetes</div> <div style="width: 33%;"><input type="checkbox"/> nervous system disorders</div> <div style="width: 33%;"><input type="checkbox"/> other serious conditions</div> <div style="width: 33%;"><input type="checkbox"/> heart disease</div> <div style="width: 33%;"><input type="checkbox"/> respiratory disease</div> </div>							
<i>(For all checked boxes, please provide details below)</i>							
Name	M/F	Date of Birth	Condition	Date of Onset	Last Date Treated	Treatment/Drug	Degree of Recovery

E. List any employees and/or dependents who are on the health plan that are disabled:

☐ NONE

Name	Disability	Qualifying Event
_____	_____	_____
_____	_____	_____
_____	_____	_____

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Is Anyone Currently Pregnant? If yes, please provide due date and note below if normal, high risk, multiple birth, or preterm labor with this pregnancy. <i>This includes employees, dependents or COBRA participants.</i>		To the Best of My Knowledge: <input type="checkbox"/> YES <input type="checkbox"/> NO
Name	Due Date	Type of Pregnancy or Condition (normal, high risk, preterm labor, etc.)

In the event that information has been omitted or is inaccurate, the insurance carrier may deny or limit coverage for an employee and < > may terminate any service agreement for breach. In such cases, the client may be liable to < > or an employee for any damages.

< > gathers this information for statistical and actuarial use only. This information is not to be used in connection with any decisions or actions regarding any individual's employment. Prospective employees in Michigan should not provide information regarding height or weight.

Because actuarial analysis requires current, accurate information, this questionnaire expires after 60 days from the date signed below. After that time, a new questionnaire will be required.

I certify that the statements are true and correct to the best of my knowledge. I understand that this form is used for information only and does not bind coverage. I will notify < > of any changes that occur after signing this Group Health Questionnaire and prior to starting health coverage with < >.

< > Program Notice of Privacy Practices provides more detailed information about how the < > Program and the health plan I have chosen may use and disclose my protected health information. I have a legal right to review this Notice of Privacy practices before I sign this consent and I am encouraged to read it in full. I have a right to request restrictions on how my protected health information is used and disclosed. The < > Program and my health plan are not required by law to grant my request. However, if my request is granted, the < > Program and my health plan are bound by their agreement. I have a right to revoke this consent in writing, except to the extent the < > or my health plan have already used or disclosed my protected health information in reliance upon my consent.

Authorized Signature

Title

Date

Print Name

Print Name of Company