AMWINS™

CONNECT ADMINISTRATORS

Traditional Self-Funding Checklist

Group Name:	Eff. Date:	Broker:
Document	**Received**	**Notes**
Census – Inclusive of DOB, Gender, Coverage Tier, Zip Code		
Employer Demographics – Inclusive of Full Address, SIC Code, Effective Date		
Two Full Year Renewals		
Detailed Claims Reports (2 years min.)		
Large Claimant Report with Prognosis and Enrollment Status		
Detailed Rx Reports that include RX name and dosage		
Benefit Summaries for all lines being quoted		
Aggregate Reports (2 years)		
Contract Type i.e. 12/15, 12/12		
Broker Compensation		
Networks/RBP?		

Amwins Connect Administrators
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800-638-6085
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Eligibility

Wholesaler	Amwins Connect Administrators
• Adds, terms and enrollment changes must be done through the Carrier's web portal (if applicable). If multiple Carriers are involved for the client, it may require multiple website updates. • Some Wholesalers may perform data entry on the web portal and verify enrollment in Carrier system.	• When Amwins Connect Administrators administers your Client - all adds, terms and enrollment changes are done through **Amwins View** ONE time for all carriers. All enrollment activity is electronically transmitted daily to the Carriers and is fully reviewed for accuracy by our QA department. Amwins Connect Administrators provides a dedicated Account Administrator (AA) for the Broker's block of business. AA's enter all enrollment data into the Carrier's web portal and verify each members' enrollment change is reflected in the system to avoid customer service issues. * electronic transmission schedule may vary per carrier.

Technology

Wholesaler	Amwins Connect Administrators
• Will vary with each Wholesaler, but typically uses Carrier's technology because they don't have proprietary technology for Broker and Client access to information.	When Amwins Connect Administrators administers your Client— Amwins View allows brokers and clients to access important information. *Access all information below:* • Custom census reports • Current plan & rate information • Financial history report • Automated election form population • Online Invoices for past 18 months • Temporary ID cards • OnQ proposal system to develop quotes for prospects or clients renewing *Online Enrollment features include:* • Add, term, change, reinstate employee coverage • Online transaction history • Update COB, Medicare, PCP and disability information • Change beneficiary information

Commissions

Wholesaler	Amwins Connect Administrators
• Pays Broker Commissions and Bonuses	• Pays Brokers Commissions & Bonuses via check or direct deposit. • Commission statements are available online. • Tracks CareFirst persistency rate on a monthly basis/communicates to Broker.

Administrative services

Wholesaler	Amwins Connect Administrators
• Not available	• Consolidated enrollment form/website for all carriers in a group. • Consolidated billing for all carriers in a group. • Consolidated payment reconciliation and payment to carriers. • Dedicated Account Administrator for Broker's block of business. • Single point of contract regarding all enrollment, billing, payment or customer service questions. • Single website for broker and client to access all information about their enrollment, billing and payment information. • Single website for clients to make online enrollment changes. • Optional COBRA/MSE administrative, billing, collection and payment services. • Optional HRA/FSA claims service (debit cards), web access to YTD claims/ balance information and reporting.