

PROJECT REQUEST FORM | Request for Proposal

partnering to make a difference

PLEASE COMPLETE SECTIONS 1 AND 2 FOR WORKSITE PROPOSALS. COMPLETE 1 AND 3 FOR OTHER PRODUCTS.

1. General Information

Group Name _____ Group Size _____ Situs State _____

Requestor _____ Blue Plan & Rep Name _____

Date Requested _____ Date Due _____ Requestor Phone Number _____ Effective Date _____

Broker Name _____ Broker Status: New-New New-In Force

2. Worksite Proposals

Type: Individual Group

Industry _____ State(s) _____

Effective Date _____ SIC Code(s) _____

Worksite Products to Include?

- Accident Hospital Care
 Cancer ECR Suite*
 Critical Illness ECR Bundle*
 Critical Illness with Cancer

*ECR Products currently sold in AL, AR, MA, NC, & TN

3. Strategy – THIS SECTION FOR NON-WORKSITE PROPOSALS ONLY

Winning Strategy Narrative _____

Bid/No Bid Process | Revenue Opportunity _____ Bid No Bid

Target Group Score (If applicable) _____ Incumbent Carrier _____ Chance to win: High Medium Low

Delivery Format

Electronic Printed Both Formal binder or questionnaire response involved? Yes No

Delivery Type: Direct to Group To Agent(s)/Broker(s) To Rep for Hand Delivery Other

EDI Services

Is Group interested in EDI? Yes No Is cost-sharing requested? Yes No

Who is their current payroll vendor*? _____

*See Project Request Guidelines for approved vendors.

Dental Reporting Requirements

Geo Requirements Census Access Parameters _____
(Ex: 2 in 10 general; 1 in 15 specialist)

Disruption Requirements Utilization Report

Note: Please attach Census and/or Utilization Report

Other Products to Include:

- Group Life/AD&D VGTL
 Dependent Life VAD&D
 Supplemental Life VSTD
 Group STD VLTD
 Group LTD Dental**
**Available in select states. HMO PPO

Services

- Assist America FICA Matching
 EAP-Online W-2 Services
 EAP-Telephonic TASC Section 125
 EAP-Enhanced 3 Visit FMLA
 EAP-Enhanced 6 Visit ASO
 EAP-Small Group 3 ATP
 Other _____

Special Instructions:

Follow Up

 requester will be contacted post-response to acquire the following fields:

Winning Carrier: _____

Reason for Loss: _____

Send to: marketing@LSVUSA.com

Questions? Give us a call at 866-666-0300

PROJECT REQUEST GUIDELINES | RFP

partnering to make a difference

Our mission? To stay progressive in a changing market and to continually enhance the service and support provided to our customers while seeking opportunities to increase sales and maximize retention.

These guidelines support our efforts in providing you with professional services that help you achieve your business objectives and goals in a timely and cost-effective manner. Please contact us at marketing@lsvusa.com if you have any questions or comments concerning our Project Request Form or its guidelines.

<p>Our Role</p>	<p>The goal of the LSV RFP area is to provide sales collateral, RFP support and sales materials that help you correctly message opportunities to all your customers. Our team has the experience, knowledge and skills to provide you exceptional communication tools to grow your business and exceed your annual goals. We work with you to develop strategic sales communications and determine the most effective way to distribute these to your audience.</p>																		
<p>When should you submit a request?</p>	<p>The project request form is required when requesting:</p> <p>NOTE: RFP Analyst will not submit IBX bids using external credentials</p> <ul style="list-style-type: none"> • Formal RFP assistance for groups with 300+ lives, or 200+ if EDI services are requested • GeoAccess/Disruption Reports • Worksite Proposals • EDI Inquiries <ul style="list-style-type: none"> – Approved* Payroll Vendors as of June 2015: <table border="0" style="width: 100%;"> <tr> <td>• PlanSource</td> <td>• Benefitfocus</td> <td>• eBenefits</td> </tr> <tr> <td>• ADP</td> <td>• Paycom</td> <td>• Farmington</td> </tr> <tr> <td>• Stratex</td> <td>• Ceridian</td> <td>• Benefit Plan</td> </tr> <tr> <td>• ConnectSource</td> <td>• Ultimate</td> <td>• CBIZ</td> </tr> <tr> <td>• SmartBen</td> <td>• VEBA</td> <td>• BeneTrac</td> </tr> <tr> <td>• CheckPoint</td> <td>• Selerix</td> <td></td> </tr> </table> <p><i>*If your group's vendor is listed, it means we already integrate with them and there is a high likelihood that we will be able to provide EDI services. If your group's vendor is not listed, EDI services may still be possible but more information will be required to make a determination.</i></p> <p>For product brochures and forms, visit yourdocumentcenter.com.</p>	• PlanSource	• Benefitfocus	• eBenefits	• ADP	• Paycom	• Farmington	• Stratex	• Ceridian	• Benefit Plan	• ConnectSource	• Ultimate	• CBIZ	• SmartBen	• VEBA	• BeneTrac	• CheckPoint	• Selerix	
• PlanSource	• Benefitfocus	• eBenefits																	
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• SmartBen	• VEBA	• BeneTrac																	
• CheckPoint	• Selerix																		
<p>How do you request support</p>	<ol style="list-style-type: none"> 1. Complete all appropriate areas of the Project Request Form 2. Email completed form to marketing@lsvusa.com 3. You will receive an automated confirmation of delivery once received 4. Your request will be assigned to the appropriate team member for processing 5. You will be contacted if additional information is needed 																		
<p>Processes and turnaround times</p>	<p>Note: The RFP Analysts strive to provide the best service possible while adhering to your specified deadlines, however, due to workloads, shorter timelines may not be met. We will not begin processing until all information is received.</p>																		

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