

1. Submit a Proposal Request Form

The fastest and most accurate way to get a quote on your groups is to use our Proposal Request Form. Be sure to complete the form in its entirety, except those sections that specifically state they do not apply to the group size you are submitting. While we don't require that you use our form, doing so ensures that you'll supply all the details necessary for an accurate quote. It may also prevent a rate change upon final enrollment.

2. Submit Member Enrollment Applications

a. Group Size:

- **2–50 Employees:** PacificSource Small Group Enrollment Application preferred
 - PacificSource Small Group Enrollment App: 3–5 business days
 - Idaho Universal Application with Release Form: 3–5 business days
 - Idaho Universal Application (no release form): 5–7 business days
- **51–99 Employees:** Large Group Enrollment Application required
- **100+ Employees:** No enrollment application is needed to obtain a quote

**Turn-around times are based on a clean submission with no missing information.*

- b. **Complete:** The Health Statement section must be filled out completely for each person listed. Missing information must be obtained in writing from the applicant, which would result in delays.
- c. **Dated Signatures:** Applications must be signed and dated less than 60 days prior

3. Additional Requirements for Groups With 100+ Employees

- d. Complete **census** in Excel form
- e. Current and renewal **rates**
- f. Claims **experience** (24 months preferred)
- g. Large claims over \$25,000 for the respective claims experience months
- h. Employee/members by month for the respective claims experience months

You'll find all the PacificSource forms and applications necessary to obtain a quote in the Agents section of our Web site, www.pacificsource.com.

More Information

If you have any questions about the quoting process, you're welcome to contact our Boise Regional Office at the phone numbers listed above. You may also e-mail Regional Manager Dave Ewers directly at dewers@pacificsource.com, or our Marketing Sales Assistant Kristin Stewart at kstewart@pacificsource.com.