

ACEC Life/Health Trust

Administered by UnitedHealthcare

Quoting & Installation Checklist

51-99 & 100+ Size Firms



Quoting an ACEC group:

- **Step 1: Submit RFP through normal UnitedHealthcare Channel**
 - o Request an ACEC Proposal from you UHC Account Executive
- **Step 2: Receive UHC (non-ACEC) underwritten rates**
- **Step 3: Once underwritten rates are generated, we will work to have the discounted ACEC Proposal generated.**

Please Note:

- ACEC Discount is applied to the UnitedHealthcare Illinois Key Account Fully Insured Plan Designs
- The firm can select up to 5 plan designs (within 50% financial spread)
- Discounts:
 - o 51-99: 7% ACEC Discount applied to the IL Key Account Plan designs
 - o 100+: 5% ACEC Discount applied to the IL Key Account Plan designs
- Rates are contingent that the firm is an active dues paying member of ACEC

Installation Requirements:

- **Submit Installation material to ACEC Regional Account Executive assigned to your region.**
(CC: Your UnitedHealthcare AE & your assigned Regional Account Executive)
 - o **Regional Account Executives:**
 - **Josh Fleming:** Joshua.Fleming@uhc.com
 - Markets: AL, AR, FL, GA, IL, IN, KY, LA, MI, MS, NC, OH, SC, TN, WV, WI AZ, CA, CO, ID, IA, MO, MT, NE, NJ, NV, NM, ND, OK, OR, SD, TX, UT, WY

Paperwork and UHC Enrollment File Needed:

- o **All of the UnitedHealthcare 51-99 or 100+ installation requirements remain the same via the ACEC Life/Health Trust.** This includes the group's situs state Employer Application – *if the group completes the IL 100+ Employer application, we will accept it.*
- o **Prime Enrollment Spreadsheet**
 - *Required Columns: A, B, C, D, E, G, H, N, O, P, Q, V, W, AA, AB*
 - *If Applicable: X, Y, AG, AH, AJ, AK, AM, AP, AR, AS, AT, AV, AW, AX, AZ*
- o Sold Quote & Product Selection Form
- o ACEC Participation Agreement
- o Confirm the firm has joined the ACEC Association
- o **Confirmation that Agent/Agency has an IL Non-Resident License**
 - The ACEC Life/Health Trust is situs out of the state of Illinois. All of the plan designs are UnitedHealthcare Illinois Key Account Plans, and require our brokers be licensed in Illinois to receive commission on ACEC Life/Health Trust business.
- o **Binder Check – Payable to either UnitedHealthcare or the ACEC Life/Health Trust**
 - Electronic copy required for installation
 - Please send only the original binder check to the below address for processing.

If using Regular Mail:

ACEC Life/Health Trust
Dept. CH 14382
Palatine, IL 60055

If using overnight services:

ACEC Life/Health Trust
Dept. CH 14382
5505 N. Cumberland Ave Ste: 307
Chicago, IL 60656-1471

Please Note:

- ACEC Life/Health Trust rates are contingent that the firm is an active dues paying member of ACEC
- The firm can select up to 5 plan designs (within 50% financial spread)
- CORE Plans are available to member firms with 90%+ of membership located in an approved CORE Zip code