

EXCESS LOSS COVERAGE – *Data and Information Request*

- 1. Company Identification Information:** Name, address, telephone number, federal tax identification number, current insurer (if applicable), current date, desired effective date of coverage, and proposal due date
- 2. Background and financial information:**
 - a. ACO structure (e.g. physician-owned, hospital/health system-owned, etc.) and primary interest in securing commercial stop loss coverage
 - b. Financial guarantee secured and type? (Surety bond, LOC etc.?)
- 3. Participant Type and Risk Sharing Option (as categorized by the Centers for Medicare and Medicaid [CMS]):**
 - a. Reach ACO participant types: New Entrant, Standard, High Needs
 - b. Risk sharing options: Global, Professional
- 4. Cohort/First Performance Year.**
- 5. 5. Data Needed:**
 - a. All available monthly and runout CCLF files for each historical performance year in any ACO program, up to 4 years of history, plus the current incomplete year
 - b. CMS financial reconciliation reports (STLMT), expenditure reports (EXPU), or other available financial summary files
 - c. CMS preliminary and quarterly benchmark reports (PRLBR and QBNMR)
 - d. Current and historical CMS provider alignment reports (PLARU)
 - e. CMS beneficiary list (ALGC)
 - f. Other sources of claim detail, if available. Contact Summit Re for format.
- 6. Estimated ACO membership for the coverage period, including a narrative explaining changes in participating providers from year to year.**
- 7. Tertiary Care Services** – Provide the key facility names for tertiary-care services.
- 8. Medical Management** – Describe the utilization and case management programs, including the process for identifying members for case management and the average case manager caseload. Describe the measure taken to prevent inpatient hospitalizations and extended confinements.
- 9. Copy of Current Policy, if applicable.** Provide a copy of the current excess loss policy and outline the coverage for the previous two years. Also share recovery reports from those years.
- 10. Disclose any material changes in the ACO structure since inception, e.g. former NextGen, DCE status, etc.**

Contact your Summit Re sales representative for secure transfer instructions.