

2023 Self-Funded Health Plan Survey Instructions



General Information

1. 2023 Self-Funded Health Plan Survey is due **5/1/2024**
2. The majority of the Self-Funded Health Plan Survey questions pertain to **Idaho residents**, regardless of which state an employer is located. A **new column/field** has been added this year with a new question regarding number of lives covered at end of the year for **All States**.
3. Please complete the survey electronically online on the DOI website.
4. If reporting for a new self-funded entity, contact information should identify the individual for point of contact if the Idaho DOI has questions about the survey.
5. Report dollar amounts and numerical counts accurately using whole numbers.
6. Do not use commas or dollar signs.
7. Additional information is required for Self-Funded entities: Name, location, type of service (ASO, ASC and/or Stop Loss), type of plan, sponsor/employer type, number of **Idaho** individuals covered at end of year, and number of lives covered at end of the year – **All States** (**New Column/Field** – see page 2).
8. Major Medical Demographic Data is intended to capture demographic data for self-funded major medical plans only.

Contact

Self-Funded Health Plan Survey or health-related questions, as well as, technical issues should be emailed to Dairyn Valencia at Healthsurvey@doi.idaho.gov.

Definition of Row Headings

- **Administrative Services Contract (ASC)** – Administrative services for a self-funded employer, association or other entity’s health plan, in which claims are paid from the administrator’s own bank account and the administrator subsequently receives reimbursement from the self-funded entity.
- **Administrative Services Only (ASO)** – Administrative services for a self-funded employer, association or other entity’s health plan in which claims are paid from a bank account owned and funded directly by a self-funded entity or claims are paid from a bank account owned by the administrator but only after receiving funds from the self-funded entity.
- **Stop Loss/Excess** – Coverage purchased by a self-funded entity (such as an employer, association or trust) to reimburse a self-funded plan for losses, paid by the self-funded plan to cover hospital, medical or surgical expenses, in in excess of a specified amount.

Definition of Column Headings

- **Earned Premium** – Earned premiums during the reporting year. (Stop loss/excess only)

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- **Idaho Individuals Covered End of Year** – Number of people, including employees and dependents, covered under self-funded health plans in force on December 31 of the reporting year including those Idahoans covered under an employer, trust or association plan in force in another state and either a Certificate of coverage or summary of benefits is delivered in Idaho by mail, online services or other non-traditional means. For example, a family plan covering two parents and two children would count as four individuals covered and an employer health plan that covers 25 employees, 20 spouses and 20 children would count as 65 individuals covered (1plan).
- **New Plans Issued During the Year** – Number of plans newly established during the reporting period.
- **Plans In Force End of Year** – Number of self-funded health plans in force on December 31 of the reporting year. In the case of employer, trust or association health coverage, if no health plans are in force in Idaho, but individuals in Idaho are covered under an employer, trust or association plan in force in another state, record the number of plans in force covering one or more Idahoans.
- **Plans Terminated During the Year** – Number of plans in force at least one day during the reporting year, but no longer in force on December 31 of the reporting year.

Other Self-Funded Plan Data

- **Group Plan**– A self-funded health plan offered by an employer or other entity that covers a group of persons as a single unit.
- **Individual Plan** – A health plan which provides protection to an individual and/or their family and which is not employment related.
Major medical – a self-funded health plan which provides hospital and medical-surgical coverage.
- **Total # Covered Lives as of December 31st**– For the purposes of this inquiry the term covered lives includes:
 - **Idaho** residents, including employees and dependents, covered under a self-funded group health plan.
 - **Idaho** residents covered under a self-funded individual health plan.
- **Total # Member Months** – The sum of the number of covered lives on a specified day of each month during the calendar year, (i.e., determines the number of covered lives on a particular day in each of the 12 months and adds together).
- **New Column/Field** - # Lives Covered at End of Year – **All States**