



Dental/Vision

NOTE: This checklist is provided as a guide. The carrier may require additional items and documentation. Please refer to the carrier's underwriting guidelines for a complete list of requirements. Please use the latest version of forms.

Our goal is to process your new group enrollment easily and efficiently in order to provide you and your client with a quick approval. The following list outlines the health plan's case submission requests:

- ☐ A copy of agent's quote (based on final enrollment)
- ☐ The most current Small Group Employer Application
- ☐ The most current applications from all employees enrolling
- ☐ Waivers from all employees not electing coverage
- ☐ Copy of company's most recent Quarterly Wage Report (Not required on Specialty only sales, including standalone new sales and up sells on existing Medical cases).
 - Indicate on the document current employment status for each employee listed; example full-time, part-time, or terminated
 - Payroll may be required for new hires not listed on the Quarterly Wage Report
 - An Eligibility Statement will be required for any officers/owners not on the Quarterly Wage Report. See California Underwriting Business Requirements for Sole Proprietors, Partners or Corporate Officers not appearing on the Quarterly Wage Report
- ☐ COBRA/FMLA/Cal-Cobra questionnaire; the last billing statement listing COBRA/Cal-Cobra subscribers
- ☐ First month's premium
 - A completed Electronic Enrollment Debit payment form for 100% of the first month's premium
 - If electronic debit is not agreed to, a company check may be accepted, subject to additional processing time

After approval, prior carrier termination letter must be submitted by the employer or broker.