



PLEASE 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:

New Group Checklist

- ☐ **Group Master Application**
- ☐ **Signed Enrollment Application from each Employee**
- ☐ **Enrollment Roster for all enrolling members in MediExcel Health Plan**
- ☐ **DE-9C** – Small Groups only, please indicate the appropriate code next to each employee's name:
 - **E** – Eligible and enrolling
 - **W** – Eligible and waiving for other group or individual coverage
- Proof of Ownership** (*only if business owner is enrolling in the Plan*)
- ☐ **Deposit Check** (*or ACH Direct Deposit Form*) **made out to MediExcel Health Plan for the first month's premium**

Quote Checklist

- ☐ **Completed Request for Proposal Form (RFP)**
 - Small Group RFP for 100 employees or less
 - Large Group RFP for 101+ employees
- ☐ **Employee Census in Excel**; *please include*
Last Name, First Name • Date of Birth • Dependents if available, relationship to EE

New Broker Checklist

- ☐ Copy of CA Broker License
- ☐ Broker Agreement
- ☐ W9
- ☐ E&O Certificate of Liability

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

Important Reminder: To help your client comply with ACA requirements, provide a copy of the appropriate Summary of Benefits and Coverage (SBC) to each employee at the Enrollment Meeting, via email or by posting on an internal company website. For the most recent information regarding MediExcel's SBCs, contact your Word & Brown representative.