



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:

Name of Group: _____

Broker: _____

- ☐ Signed Group Master Application.
- ☐ Signed Group Contract.
- ☐ Employee enrollment forms.
- ☐ Binder check (first month's premium)
- ☐ If new broker, signed Solicitors Agreement
- ☐ All Ancillary products can only be offered with Medical
- ☐ The most recent DE-9C report

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 SIMNSA's SBCs, contact your Word & Brown representative.