

**1-50 Sold Group - National (non-CA)**

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:

- ☐ Appointment required for both writing agent and agency (if not yet appointed with UHC in that state); copy of the agent's & agency's license for that state required.
Note: CA agents/agencies MUST be appointed with UHC prior to sold case submission
- ☐ Employee Enrollment Apps or Enrollment Spreadsheet all data completed
*States that don't accept enrollment spreadsheets: ID, CT, DC, DE, PA, RI, HI, IA, NJ, NY, VT and WI
- ☐ Employer Application
- ☐ Quarterly Wage & Tax
- ☐ Participation Certification (In lieu of W+T for groups 10+ EEs)
- ☐ Product & Benefit Selection Form
- ☐ Copy of UHC ran quote showing plans/rates offered.
- ☐ Direct debit form with a copy of the voided check or a Copy of the Binder Check (should be equal to first month's premium).
*After Policy is issued mail the physical binder check to the address listed in SAMx.
- ☐ Submission Cutoffs:
1st eff date = 5th business day to UHC or GA (*GA cutoff is the 10th Calendar Day*)
15th eff date = 20th of the month to UHC or GA (*GA cutoff is the 25th Calendar Day*)
- ☐ Submit all groups in SAMx (if the group can't be submitted in SAMx, the following applies): Send new business case submissions to westsub@uhc.com and CC the UHC Account Executive

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