



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:

All documentation must be submitted to WHA by the 5th of the month in order to guarantee that month's effective date:

- ☐ Employer Group Application for Small Group
- ☐ Enrollment/Change Form for each enrollee (with HSA Authorization Form, if applicable)
- ☐ Declination of Coverage Form for each eligible employee who declines group health coverage for themselves and/or their dependents
- ☐ A payment for the first month's premium on company check stock (electronic payment options are available once the group has been installed)

One of the following options:

1. For Employers: a copy of the most recent Quarterly Contribution Return and Report of Wages (Continuation) (DE 9C)
2. For LLCs and Partnerships: a copy of most recent Schedule K listing all members or partners

Sole proprietors, owners or partners who are not listed on the DE 9C or payroll report will need to sign the WHA Sole Proprietor/Owner/Partner Statement

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 Western Health Advantage's SBCs, contact your Word & Brown representative.