



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 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:

Selling Group Dental from the Brochure

- Completed Master Application signed by employer and agent
- New Business Transmittal completed by the agent
- An enrollment form completed and signed by each person enrolling (minimum of 3 enrolled lives)
- A check for the first month premium payable to Ameritas

Please note: A \$10 monthly administrative fee will apply, subject to state requirements. The fee is waived if the group elects to pay by electronic funds transfer or if both Ameritas Edge dental and Ameritas Edge vision plans are selected.

Submitting a Group with "Takeover" Benefits

- All of the above plus a copy of the prior carrier's benefits
- Copy of the takeover quote, if quoted

Documentation Requirements

- Group Master Application** (signed by agent & officer of group)
- New Business Transmittal** (completed by agent)
- Enrollment information completed for each enrollee
- Waiver of coverage on back of enrollment information signed by employee when declining coverage (Only required for Edge Unique Plans A&B)**
- A check for the first month premium
- A copy of the prior carrier's benefits* (Required for all plans except Edge Basic Plus)**
- A copy of the quote, if applicable**

* Only required when selling "takeover."

** When submitting new business online, simply retain signed copies of the Master Application and Transmittal for your records