

New group enrollment checklist

7 simple steps to enroll

Enrolling with Kaiser Permanente is quick and easy if you follow the steps outlined below. Please submit the following documents to your Kaiser Permanente sales representative. Make sure that each applicable document is complete and signed so we can efficiently process your new group enrollment and provide a quick approval for your group. (See the reverse for additional enrollment tips.)

1. Complete the *New Group Application*.

- Complete the application, including the signature of the authorized contract signer and date of the signature.
- Indicate your group's contract delivery method.

2. Business/Owner Eligibility Documentation

Examples of this documentation: a current/active business license, Fictitious Name Statement, or tax documents. If incorporated, an "Active" or "Good Standing" status from the Secretary of State and a filed Statement of Information would need to be presented for officers.

3. Submit the most recent DE 9C Quarterly Wage Report and/or payroll reports.

All groups with eligible employees are required to provide the most recent DE 9C filing that shows a full quarter of data. Submit the *New Employee Eligibility Documentation* form for employees hired in the last 30 calendar days who cannot be verified with at least 2 weeks of payroll records. If there is no payroll or common-law/W-2 employee (not counting owners, spouses, or domestic partners on payroll), the group does not meet eligibility for small group.

4. Complete the *Proprietor/Partner/Corporate Officer Eligibility Statement* (if applicable).

Each enrolling proprietor, partner, or corporate officer who is not listed on the DE 9C or payroll report completes and signs this form.

5. Complete the *Employee Enrollment forms*.

Each enrolling eligible employee completes the "Employee Information" section of this form (includes their dependent information, if dependents are enrolling) and submits it to their employer for processing. Make sure all employees make copies.

Employee Enrollment forms are included in the *Employee Enrollment Kits* and may also be downloaded at account.kp.org.

6. Provide documentation for employees who are declining coverage.

Each eligible employee who declines coverage must complete the *Declination of Coverage* form.

7. Set up the first month's premium payment.

Complete the *Authorization for Initial Payment by Electronic Transfer* form for the first month's payment. As an alternative, the group may submit a copy of a business check in the amount of the first month's premium and payable to Kaiser Permanente along with the *New Group Application*.

Questions? See your cover letter for contact information or visit account.kp.org for additional information.

Additional enrollment tips

1. New group status

Any group that is part of an existing Kaiser Permanente group that applies for coverage as a new, separate group does not qualify as new business and will not be re-rated.

2. DE 9C Quarterly Wage Report and/or payroll reports

On the DE 9C and/or payroll records, note the status of each employee using the following codes:

KP – enrolling with Kaiser Permanente

Initials of your alternate carrier, if you offer one. Example: BC = Blue Cross

D – declining (Include a *Declination of Coverage* form for each employee declining coverage.)

T – terminated

NE – not eligible (specify reason; part-time, seasonal, 1099, etc.)

3. Proprietor/Partner/Corporate Officer Eligibility Statement

To determine what additional ownership/business validation documentation is required, contact your Kaiser Permanente sales representative.

4. Employee Enrollment form(s)

Please be sure that employees retain a copy of their enrollment forms. They will need this information — especially the customer ID number, plan name, and effective date — to complete the *Temporary Member ID* form for accessing care until they receive their member ID cards.

5. Declining coverage – participation requirement

A minimum of 70 percent of all eligible employees must have group health plan coverage.

6. Premium payment

Once your group has been approved, Kaiser Permanente will either debit their account for the premium amount or provide a mailing address where the original check can be submitted, depending on which option is chosen. Please note that the authorization for payment by electronic check applies **only to the first payment**.

Kaiser Permanente Small Business does not accept credit card payments for small business premiums.

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