

Small Business Group submission checklist

To ensure prompt processing, please make sure to include the following documents.

Groups applying for a 1st-of-the-month effective date must be submitted to Health Net by the 5th of the month. Paperwork must be completed by the 20th of the month; otherwise, the group will be rolled to the following month.

- A signed original application for Group Service Agreement (GSA)/Group Policy
- A complete employee application for each eligible employee enrolling/waiving coverage
- A check or a Check-by-Fax form for the first month's premium drawn from the group account
- The latest quarter DE-9C, reconciled:
 - If the group has not been in business long enough to have a DE-9C, six weeks of payroll, including withholdings, may be submitted.
 - 2-week payroll is required for all employees that don't appear on the current DE-9C.
 - For wages exceeding part-time and wages below full-time status, payroll will be required.
 - To reconcile the DE-9C, please indicate next to each employee's name one of the following:
 - T** – Terminated (including termination date)
 - E** – Eligible and enrolling
 - W** – Eligible and waiving coverage
 - S** – Seasonal
 - WP** – Waiting period (include date of hire for those in waiting period)
 - TEMP** – Temporary employees
 - PT** – Part-time
 - Covered by another carrier – add carrier name.
- Ownership paperwork (required if owner/partners' names do not appear on the DE-9C or payroll records). Must list each person's first and last name. Paperwork must be filed with the state or county. Documentation may include:

For sole proprietor:

- California Business License
- Fictitious Business Name Statement
- Schedule C Tax Form

For partnership:

- California Business License (showing both names)
- Fictitious Business Name Statement (showing both names)
- Schedule K Tax Form (for all eligible owners)
- Tax certificate (showing both names)

For corporation:

- Articles of Incorporation
- Statement of Information
- Tax Form 1120

Note: Please consult your sales representative for acceptable ownership documentation for other business structures.

For PPO plans:

- Copies of EOBs for employees requesting Deductible Credit from prior carrier

Send all completed paperwork to your designated account executive or broker.