

ENROLLMENT CHECKLIST

We accept groups of 1 - 100 Full Time Equivalents. Groups must have at least one eligible W2 Employee other than an owner or spouse of an owner and must be in business at least 30 consecutive days.

1. Most recently filed and reconciled DE9C
2. Ownership documents pertinent to the type of entity (refer to the Employer App on second page of attached pdf) FYI - a Statement of Information does not have to be stamped. Corporations and LLC's must be in good standing and show "Active Status" on the SOS Business Portal
3. New Hires - if they haven't received their first paycheck we require a letter on the groups' letterhead stating they are offering coverage to the employee as well as the employees date of hire
4. If the group hasn't been in business long enough to file a DE9C, we require 30 days of company payroll
5. We require all eligible employees to complete an enrollment form. For any employee waiving/declining, they are required to complete Step 6 only, If employees are waiving coverage for dependents, please have them also complete Step 6 of the application. We do not require proof of other coverage for Valid Waivers. Valid Waivers are considered; any other group coverage, VA, Active Duty Military, Tri Care, Medicare, Medi-Cal
6. Employees must sign Step 3 and 5 of the Employee Application
7. Waiting Period - up to 60 days from the date of hire. Employer manages this within the group.
8. We do not require a groups' Work Comp Insurance information.
9. Agents are required to complete the bottom of Step 3 and Step 8 of the Employer Application.
10. Please collect the binder payment and hold on to it until the first invoice is available. We require at least 85% of the first month's premium. Once we post payment the group will be transmitted to the carrier/s
11. If you're working with a GA, please submit the case documents to your rep, if no GA, please send the case documents to me by email or fax.