



# New Group Checklist

- Group Application**
- Signed enrollment application from each EE**
- Declination of coverage form** If MediExcel Health Plan is wrapping with a US carrier, a waiver is NOT required.
- Cross Reference Sheet** for all enrolling members (Excel Format)
- Deposit check** made out to MediExcel Health Plan for the first month's premium.
- Employer Ownership paperwork** (required if the names of the owners do not appear on the most recent DE-9C).

Acceptable forms of documentation include:

### **For a Sole Proprietor**

- Business license,
- Fictitious business name statement, or
- Schedule C tax form

### **For a Partnership/LLC**

- Business license (showing all names)
- Fictitious business name statement (showing all names)
- Schedule K tax form (for each partner)

### **For a Corporation**

- Corporation documents
- Articles of incorporation
- Statement of information

**In addition to the items listed above we will also need:**

### **For Small Group:**

- **DE-9C** -To reconcile the DE-9C, please indicate the appropriate code next to each employee's name.

**T** - Terminated (indicate term date)

**E** - Eligible and enrolling

**W** - Eligible and waiving for other group or individual coverage

**I** - Ineligible (part-time, seasonal, waiting period)

### **For Large Group :**

- **Complete employee roster** for each employee which includes: name, eligibility for benefits and health plan selected

### **Broker Paperwork**

- Copy of License, W-9 and E&O certificate
- Broker Agreement