



Sold Group Checklist

Small Business Group

The following documents are required:

1. Has the Group Plan Contract Application been completed and signed?	<input type="checkbox"/> Yes <input type="checkbox"/> No										
2. Completed Employee Census Enrollment? (Each employee must complete and sign an Enrollment and Change Form. Copies of the enrollment must be maintained by the agent.)	<input type="checkbox"/> Yes <input type="checkbox"/> No										
3. Are copies of the Sold Plan and Rates included? ¹	<input type="checkbox"/> Yes <input type="checkbox"/> No										
4. Is the Electronic Check Form for the first month's premium included?	<input type="checkbox"/> Yes <input type="checkbox"/> No										
5. If submitting paper enrollment forms instead of a census enrollment spreadsheet, is the Group Census for all employees included?	<input type="checkbox"/> Yes <input type="checkbox"/> No										
6. Is the Legal Ownership documentation included? (For groups of 1-2 enrolling employees whose owners are not included on the wage statement, all employees and owners must be listed on Form 132 or the ownership documentation.)	<input type="checkbox"/> Yes <input type="checkbox"/> No										
7. For groups enrolling 1-2 employees, is the most recent, reconciled State Quarterly Wage Statement Form 132 included? The Form 132 must be reconciled. ² In order to reconcile the Form 132, the employer must indicate the current status next to each employee:	<input type="checkbox"/> Yes <input type="checkbox"/> No										
<table border="0"> <tr> <td>1. 'T' for terminated</td> <td>6. Covered by another carrier, use 'K' for Kaiser, 'BC' for Blue Cross, etc</td> </tr> <tr> <td>2. 'E' for eligible and enrolling</td> <td>7. 'U' for union employees</td> </tr> <tr> <td>3. 'W' for eligible and waiving</td> <td>8. 'PT' for part-time employees</td> </tr> <tr> <td>4. 'S' for seasonal employee</td> <td>9. 'WP' for waiting period (must include date of hire)</td> </tr> <tr> <td>5. 'Temp' for temporary employees</td> <td></td> </tr> </table>	1. 'T' for terminated	6. Covered by another carrier, use 'K' for Kaiser, 'BC' for Blue Cross, etc	2. 'E' for eligible and enrolling	7. 'U' for union employees	3. 'W' for eligible and waiving	8. 'PT' for part-time employees	4. 'S' for seasonal employee	9. 'WP' for waiting period (must include date of hire)	5. 'Temp' for temporary employees		
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Deadline for new group submissions:

When we receive complete new group applications in-house by the 15th of the month prior to the group's effective date of coverage, we are able to provide some important services before coverage actually begins. These services include sending member identification cards to new members prior to their effective date of coverage. New groups submitted after the 15th of the month may experience a delay in their requested coverage effective date, as well as services.

Please note: The above requirements are in accordance with our Underwriting Guidelines. If you have answered "No" to any of the questions above (except #7, and unless alternative ownership documentation has been provided), we will delay submitting the group to Underwriting until all paperwork has been received. **Incomplete or inaccurate applications will be returned for correction. Please cross out and initial any changes to the original copy and do not use white-out products.**

¹Rates are based on final enrollment. If there are any changes to the submitted rates, your Account Executive will reach out to you to confirm acceptance of final rates and require a revised Group Plan Contract Application.

²If the most recent Form 132 is not included, please contact your Health Net Account Executive for alternative ownership documentation that may be used instead. (Typically four weeks' most current payroll showing pay periods and hours worked can be used if an employee is too new to be listed on Form 132.)