

Sold Group Checklist

Small Business Group (Oregon)

The following documents are required:		
1. Has the Group Service Agreement Application been completed and signed?	☐ Yes	□No
2. Completed Employee Census Enrollment?	☐ Yes	□No
(Each employee must complete and sign an Enrollment and Change Form. Copies of the enrollment must be maintained by the agent.)		
3. Are copies of the Sold Plan and Rates included?	☐ Yes	□ No
4. Is the binder check for the first month's premium included?	☐ Yes	□No
5. Is the Group Census for all employees included?	☐ Yes	□No
6. Is the Legal Ownership documentation included?	☐ Yes	□No
(For groups of 1–5 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.)		
7. Is the most recent State Quarterly Wage Statement Form 132 included?	☐ Yes	□ No¹
(For groups enrolling 1–5 employees or groups requesting first of the month following date of hire commencement of coverage.)		

¹If 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.)

Please note our standard deadlines for new group submissions:

New groups received before the 15th of the month prior to the group's effective date of coverage:

When we receive fully-completed 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. Please note that new case submissions that are not received by the 15th of the prior month and incomplete case submissions cannot be processed in time to provide member identification cards to the new members before their effective date.

New groups received after the 15th of the month prior to the group's effective date:

Group information submitted after the 15th of the month prior to the effective date will impact the level of service, including identification cards and benefit administration.

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.

Health Net Health Plan of Oregon, Inc. is a subsidiary of Health Net, Inc. Health Net is a registered service mark of Health Net, Inc. All rights reserved.

FRM026542EC00 (1/19)