Word&Brown

CALIFORNIA - NEW GROUP

SUBMISSION CHECKLIST

Seniors Choice
Group Retiree Medical

PLEASE NOTE: This checklist is provided as a guide. The carrier may require additional items and documentation. Please refer to the carrier's underwriting guidelines for a complete list of requirements. Please use the latest version of forms.

Our goal is to process your new group enrollment easily and efficiently in order to provide you and your client with a quick approval. The following list outlines the health plan's case submission requests:

For New Sponsoring Entity

- ☐ Employer Trust Agreement (with **physical** address).
- ☐ Supporting Business Entity Documentation (Depending on Entity Type - Specifications are listed on the Employer Trust Participation Agreement and in the Eligibility Guidelines).

For New Enrollee

- ☐ Enrollment Application (with **physical** address).
- ☐ Copy of Medicare card.
- ☐ First month premium check made payable to: "Seniors Choice." First month's premium is due at time of request for new groups and for add-ons of individually billed groups. Add-ons for individually billed groups must pay via EFT or CC. We will accept a copy of the check to start the process and approve, but the check must be received by the enrollment deadline date. Otherwise, enrollment will be pushed to the next month.

After approval, prior carrier termination letter must be submitted by the employer or broker.

Important Reminder: To help your client comply with ACA requirements, provide a copy of the appropriate Summary of Benefits and Coverage (SBC) to each employee at the Enrollment Meeting, via email or by posting on an internal company website. For the most recent information regarding Senor's Choice SBCs, contact your Word & Brown representative.