

	Underwriting Case Submission				Client Experience Maintenance	
Small Group Medical	Underwriting Submission Tool	PDF EE Applications Required	Census Enrollment Template	Applications Submitted to Carrier	Member ID Number Availability	Adds/Terms/Member Level Changes
	Portal	•	•		3-5 business days after approval	Portal
	Email	•	•		Same day as approval	Email

Category Definitions

Underwriting Submission Tool

Carrier has an enrollment system for W&B Underwriting to submit new case submissions.

PDF EE Applications Required

Carrier requires that applications are completed by each member and made available to carrier at their discretion.

Census Enrollment Template

Carrier has a census enrollment template/workbook that brokers and GAs can use for submission.

Member ID Number Availability

ID numbers are available to download from carrier portal.

Adds/Terms/Member Level Changes

W&B uses the preferred and quickest method of submission to the carrier.