



**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:

- A copy of agent's quote (based on final enrollment)
- The most current *Small Group Employer Application*
- The most current applications from all employees enrolling
- Declinations from all employees declining coverage (sections 2 and 4 of the employee application)
- A copy of the company's most recent *Quarterly State Tax Withholding Statement* with the current employment status of all employees listed\*
- If "takeover" coverage, a copy of the prior carrier's last month's group premium statement
- COBRA/FMLA/Cal-Cobra questionnaire; the last billing statement listing COBRA/Cal-Cobra subscribers
- A company check, or completed **Check-by-Fax** form (Form #12238CABEN), for the first month's applicable coverage(s) made payable to Anthem Blue Cross
- Submission is 100% of the premium with applications
- Employer's *Statement of Understanding*
- (Form #12250CAEEN) required when the group is offering HSA-compatible plans or the BeneFits portfolio

\* See Section 3, California Underwriting Business Requirements for the Sole Proprietors, Partners or Corporate Officers not appearing on the **DE-9C (Formerly DE-6)**.

**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 Anthem's SBCs, contact your Word & Brown Representative.