

Small Group Agent Checklist



Complete, sign, and date the “Agent’s Attestation” section of the Employer Application.

Please review all forms to ensure that employer/employee applications are complete with signatures and dates. Incomplete forms could delay processing time.

Please submit all necessary forms and documentation, including:

☐ A copy of agent’s final sold quote. If you need a quote, please send a quote request to connect@anthem.com

*If dental and vision are sold, a quote from Connect is required.

☐ The most current employer enrollment application (must be completed entirely).

☐ The most current employee enrollment applications from all employees enrolling or census enrollment.

☐ Waivers from all employees not electing coverage. This is to determine participation.

☐ Copy of company's most recent Quarterly State Tax Withholding Report. Prior carrier bill or CA Compliance form will be accepted when there are 3 or more enrolling.

- Indicate on the document, the current employment status for each employee. Example: full time, part time, terminated, etc.
- Payroll or date of hire letter may be required for new hires not listed on the documentation.
- An Eligibility Statement along with proof of ownership (please refer to the underwriting guidelines) will be required for any officers/owners not on the quarterly wage report.
- Groups with Union employees- Union roster or Bargaining Agreement will be required.

☐ First month’s premium, a completed Electronic Enrollment Debit payment form for 100% of the first month’s premium.

☐ Completed Conditions of Enrollment Start-Up Companies/PEO Spin-Off Groups. If applicable, legal documentation is required. Please refer to the underwriting guideline.

☐ If applicable, include a completed Premium Only Plan (P.O.P.) enrollment form and a separate check in the amount of \$125 payable to Anthem Blue Cross (Anthem).

Anthem will accept new group submissions for the following effective dates:

- 1st of the month — submit by the 5th working day of the month.
- 15th of the month — submit by the 12th calendar day of the month.

Email new business submission to: newsguwca@anthem.com