Word&Brown

CALIFORNIA - NEW GROUP

SUBMISSION CHECKLIST

premier avēsis

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:

- ☐ **Employer Application:** The application should be completed and signed by the client and the broker.
- ☐ **Employee Enrollment:** An enrollment application from all employees who enroll OR Excel list enrollment on the Premier Access template.
- ☐ **Employer Statement:** An employer statement should be included if submitting Excel list enrollment.
- ☐ **Proposal Document:** A copy of the original proposal document issued by Premier that lists the plan provisions and rates for the benefit plan you are choosing.
- ☐ **Deposit:** A check or one-time/recurring EFT form from the employer that will be applied to the first month's premium.
- ☐ **Prior Carrier's Billing Statement:** A copy of the most recent billing statement from the prior carrier is needed if there is prior coverage and the group is selecting a plan with a waiting period on major/ortho services.
- ☐ **COBRA Information:** A list of all former employees/dependents on COBRA which includes the qualifying event reason and qualifying date of COBRA coverage plus a copy of the COBRA election statement(s).
- ☐ **Plus Plan Disclosure Form:** A Plus Plan Disclosure form is required for Plus (MAC) plans.

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