



Sold Groups Enrollment Checklists

Small Group

- First month's premium check.
- Completed and signed Group Master Application.
- Copy of sold rates with the plan(s) that the group would like, circled.
- Applications for enrolling employees.
- If the group has 10 or more employees, an electronic MMS file may be used (waivers will also need to be entered on the MMS file).
- Waivers for employees not enrolling, even if an MMS file was used for enrolling employees.
- If the group is signing up for SHOP (only available in Idaho and Oregon), indicate that on the application and provide a copy of the SHOP ID number and submitted application.

Midsize Group

- First month's premium check.
- Completed and signed Group Master Application.
- Copy of sold rates with the plan(s) that the group would like, checked off and signed.
- Applications for enrolling employees
- MMS file can be created which will save on the amount of time it takes to enter employees. (Typically this saves a couple of days of processing.)
- Waivers for employees not enrolling, even if an MMS file was used for enrolling employees.

If you have questions, feel free to contact either your Sales Executive or Sales & Service Coordinator.