

Northwest Wood Products Trust (NWPT)

New Business / Renewal Checklist

Thank you for your continued partnership with the Northwest Wood Products Trust (NWPT) sponsored by PacificSource Health Plans. Below is a list of all required paperwork for us to process your new or renewing group. Please include the following documents with your new business or renewing group submissions:

New Business Mandatory Forms

- ☐ NWPT Joiner Agreement
 - Membership dues are payable to: Gossard & Associates
 - Mail to: Northwest Wood Products Trust, PO Box 506, Medford, OR 97501
- ☐ Group Master Application (GMA)
- ☐ Employee Applications or Census Enrollment Spreadsheet (EME)
- ☐ Scanned copy of binder check for first month's premium
 - First month's premium is payable to: PacificSource Health Plans
 - Mail to: PacificSource Health Plans, PO Box 35123, Seattle, WA 98124-5123
- ☐ Copy of the quote that was sold

New Business Optional Forms (required if applicable to the group)

- ☐ PacificSource Administrators, Inc. (PSA) COBRA Administration
- ☐ EFT (Electronic Funds Transfer) form with voided check
- ☐ Common Ownership Form

Renewal Mandatory Forms

- ☐ Renewal Confirmation Form (RCF)
- ☐ Copy of renewal rates (unless group is renewing "as is")

Renewal Optional Forms (required if applicable to the group)

- ☐ Employee Applications:
 - For any new employees or dependent changes at Open Enrollment
 - If group is adding a benefit and enrollment does not match current enrollment

Please submit all new business or renewing group paperwork in a complete packet to Johnson Benefit Planning prior to the effective/renewal date: JBAdmin@JohnsonBenefitPlanning.com

PacificSource.com/NWPT | Johnson Benefit Planning | 541-382-3571 | 0222



Plans offered by PacificSource Health Plans