



SMALL GROUP (2-50) CHECKLIST

Make sure that we receive all items listed below when you submit a sold case for final review.
If any items are missing, this will delay the group from being set up in our system.

Group Name: _____

- Application for Group Policy (Employer Application)**
- Health Statements (Required for groups <50)**
 - *Health Statements are not valid if the signature date is greater than 90-days prior to the effective date.*
- Enrollment/Change Application**
 - *Must be submitted for all employees working 30+ hours per week;*
 - *All new hires, employees currently in their waiting period, and employees who are waiving coverage (Section 4 Waiver of Coverage on Enrollment/Change Application).*
- Initial Premium Check (Binder check)**
 - *Check must be made payable to ADVANTAGE Health Solutions.*
- Most Recent Prior Carrier Bill & Benefit Summary**
 - *Dated within 30-days of requested effective date, if group had prior health insurance.*
 - *Deductible carryover credit report(s) must be received within 60-days of the effective date in or to be credited.*
- Most recent Quarterly Wage & Tax Statement (UC1)**
 - *Employer must denote each employee's status (fulltime, part-time, termed, etc.) and add all new hires (along with their status) on the statement.*
- Copy of the Quoted Rates & Benefits**
- Chamber Plan (Proof of Chamber Membership Required)**

All of the above items must be received on or before the requested effective date.

With your help, customers can enjoy a smooth transition to ADVANTAGE Health Solutions.

Thank you for your business.