



Sold Groups Enrollment Checklists

Small Group (1–50)

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.

Group Identification Form
(Oregon, Montana and Washington only)

Midsize Group (51–99)

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.

Group Identification Form
(Oregon, Montana and Washington only)

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