



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 Check for the first month's premium payable to "Sharp."
- Master application – there are three different Master Applications of which only one must be completed based on plan selection and group location: one for combined HMO and PPO coverage, one for HMO San Diego groups, and one for HMO South Riverside County groups.
- Employee Enrollment Forms – there are three different Employee Enrollment Forms of which one must be completed by each employee based on plan selection and group location: one for combined HMO and PPO coverage, one for HMO San Diego groups, and one for HMO South Riverside County groups.
- Master application and Employee Enrollment Forms must be signed and dated within 60 days of requested effective date.
- Completed Declination of Coverage section for employees not electing coverage. ID cards are required to verify participation.
- Health Questionnaires: not required for guaranteed issue groups of 2-5 enrolling employees (auto 1.1 RAF). All groups of 6-24 enrolling employees must complete the Individual Health Questionnaires (unless the group qualifies for an RAF special). All groups of groups of 25+ enrolling employees must complete the Group Questionnaire (unless the group qualifies for an RAF special). All non-guaranteed issue groups, regardless of group size, must complete the Individual Health Questionnaires.
- Most recent prior carrier billing statement listing the group's name, all the covered employees and the billing date.
- The most recent quarter **DE-9C (formerly DE-6)** reconciled. For new hires not appearing on the DE-9C, 2 weeks of current payroll records are required (W-4's are not acceptable substitute). For the owners/partners not appearing on the DE-9C or showing part-time wages on the DE-9C, provide required ownership documentation. Group must provide documentation (i.e. payroll, DE-9C, ownership documents) to show there have been at least two full-time employees 45 days (6 weeks) prior to the requested effective date.
- Workers' Compensation is required except those not required by law to be covered by Workers' Compensation.
- When a company has a DBA (Doing Business As), a copy of the current Fictitious Business Name Statement must be provided to link the legal name to the DBA.
- 1099 employees are not eligible for coverage.
- Waiting period: minimum is first of the month following date of hire; maximum is 365 days (1 year).
- Dual/Multi plan option - minimum of 6 enrolled employees.
- Wraps are only allowed when group is applying for a single plan.
- Carve-outs are non-guaranteed issue and require a minimum of 5 enrolled, 100% participation, and individual health statements.
- Licensing:** Completed Agent/Broker Information form and W-9, along with current California Life License and E&O Declaration page.