EmblemHealth

SMALL GROUP

<u>New Business Submissions</u>

In order to enroll new groups in a timely manner and ensure that their initial experience is a positive one, our Broker Portal and Manual submission deadline for new business is the **23rd of each month** for coverage effective the first of the following month. We strongly recommend that you submit your new business cases a week sooner to allow for 'scrubbing' and receipt of any missing documentation/ information. Only *'clean'* submissions will be submitted to Underwriting -- no exceptions.

The following *must* be provided for all new case submissions:

1. **Group Application**
2. **Binder Check (payment equivalent to one month's premium)**
3. **Tax Documents -- group's most recent NYS-45 tax document (W-4 for new hires)**
4. **Transaction Form(s)**
5. **HealthConnect Quote - signed**

<u>Group Application</u>

- Application must be legible (black ink)
- Group's name on Application and Tax Document must correspond
- Application must be properly completed

<u>Tax Documents</u>

- Group's most recent tax document required
- Group's Tax ID Number must be reflected
- Each employee to be enrolled must appear on the NYS-45 or NYS-45-ATT.
    - *Indicate the status of each employee listed on tax document (ex. full-time, part-time, termed etc.)*
- W-4 must be provided for newly hired employees that do not appear on the filed tax document
- Employees' social security numbers must appear on tax document (the last 4 digits acceptable)

<u>Transaction [Enrollment] Forms</u>

- Transaction form must be legible (black ink)
- Transaction forms must be properly completed – (signatures required for applicant and Group Plan Administrator)
- PCP selection
- Employee's social security number must correspond with tax document (NYS-45 or W-4)
- Employee's complete address must be provided
- Proof of relationship must be provided for the subscriber's dependents with different last names – (marriage certificate, birth certificate or Federal 1040 required.)