## **Small Group Agent Checklist**



Complete, sign, and date the "Agent's Attestation" section of the Employer Application.

Please review all forms to ensure that employer/employee applications are complete with signatures and dates. Incomplete forms could delay processing time.

Please submit all necessary forms and documentation, including: 1. A copy of agent's final sold quote. If you are in need of a quote, please send quote requests to connect@anthem.com. 2. The most current Employer Enrollment Application (including Cal-COBRA/COBRA/Medical Leave Questionnaire, if applicable). 3. The most current employee enrollment applications from all employees enrolling. 4. Waivers from all employees not electing coverage. 5. Copy of company's most recent Quarterly State Tax Withholding Report. Indicate on the document current employment status for each employee listed; example full-time, part-time, or terminated. Payroll may be required for new hires not listed on the Quarterly State Tax Withholding Report. • An Eligibility Statement will be required for any officers/owners not on the guarterly wage report. 6. If "take-over coverage," a copy of the prior carrier's last month's group premium statement. • Copy of last month's prior carrier's group premium statement must be provided for all products elected. 7. First month's premium • A completed Electronic Enrollment Debit payment form for 100% of the first month's premium. If electronic debit is not agreed to, a company check may be accepted, subject to additional processing time. 8. Completed Conditions of Enrollment Start-Up Companies/PEO Spin-Off Groups. If applicable,

9. If applicable, include a completed Premium Only Plan (P.O.P.) enrollment form and a separate check

Anthem will accept new group submissions for the following effective dates:

- 1st of the month submit by the 5th working day of the month.
- 15th of the month submit by the 12th calendar day of the month.

in the amount of \$125 payable to Anthem Blue Cross (Anthem).

Email new business submission (Electronic Debit Payment form required) to: newsguwca@anthem.com

legal documentation is required. Please refer to the underwriting guideline.