

The following documents are required when submitting a new group:

- New group documents:
 - Subscription Agreement
 - Include the broker information at the bottom of page 3
 - Tax Documents confirming benefit eligible employees
 - DE-9 and DE9C; or
 - 30 days of payroll, if the business was established within the last 90 days; or
 - No documentation is required if the business was established within the last 30 days
- Enrollment and waiver forms for all benefit eligible employees
- Broker Documents:
 - Producer's Agreement (all pages) completed and signed
 - If an addendum is needed, it will be forwarded to you for completion by the call center.
 - Proof of Errors & Omissions coverage (E&O)
 - Minimum of \$1,000,000 liability per incident
 - Most recent W-9
 - Indicate whether this is a direct case or through a General Agency
 - CA License number for verification

Once all documents are received, they will be reviewed within 2 business days. If items are missing, a response will be sent requesting the missing items. All new group applications must be received by the 5th of the month for which coverage is being requested.

For a thorough overview of the Group Insurance Trust's administrative rules and guidelines, please review the "Firm Administrator's Guide" located at www.calcpahealth.com. You are also welcome to contact Banyan Administrators, managers for the CalCPA Health programs, via phone (877) 480-7923, fax (877) 237-4519, or email calcpahealth@calcpahealth.com with any questions or concerns.