



New Group Checklist

Group Name: _____

Effective Date: _____

Sales Rep: _____

The following items will be required on all new groups before they will be accepted by underwriting and sent to enrollment or billing:

- Premium Check
- Wage & Tax
- Prior Carrier Billing
- Group Contract
- Group Application
- Individual Enrollment forms
- Individual Waivers
- Signed Final Rate Sheet

Paperwork to UW: _____

Enrollment Meeting Scheduled: _____

Wrap-Up Scheduled: _____