



NOTE: In order to provide our customers with timely and accurate issuance of policies and certificates, we must receive all of the following documents checked below in order to proceed with the underwriting and issue process. Incomplete enrollment paperwork will result in processing delays.	
Group Application Kit or Participation Agreement	Required for all cases. Kit includes Group Application, Group Transmittal, and FICA Tax/W-2 Agreement for disability cases. Must be completed in its entirety and signed prior to the effective date.
Producer Transmittal	Required for all cases. Must be completed in its entirety.
EAP-FMLA Account Notice Form	Required for Employee Assistance Program (EAP) upgrade programs and/or Family Medical Leave Act (FMLA) programs.
Deposit Premium Check	Required for basic coverage for all List Bill Groups. Preferred for voluntary coverages, but not required. Estimated first month's premium.
Electronic Census	Required for all vision cases and all List Bill cases with 50+ lives.
Enrollment Forms	Required for groups under 50 lives if electronic census is not provided, or when EOI forms are submitted.
Employee Evidence of Insurability (EOI) Forms	Required if Applicable
Copy of Prior Carrier's Plan Policy/ Certificate	Required for all lines of coverage (except vision) if replacing coverage.
Proof of Prior Coverage (Most Recent Prior Carrier Bill)	Required for all Voluntary and Supplemental Coverages (except vision) for List Bill cases if replacing coverage.
Copy of Final Sold Proposal	Required for each line of coverage sold. The entire proposal must be provided.
Signed Group Benefits Proposal Acceptance Letter	Required for all Groups with 100 or more lives.
Not Actively at Work Listing	Required for all Life cases with 50+ lives.
Notes	