

## NEW GROUP ENROLLMENT CHECKLIST

### Simple steps to enroll

Enrolling with Kaiser Permanente is quick and easy if you follow the steps below. Please submit the following documents to your Kaiser Permanente sales representative. Make sure that each document is complete and signed so we can provide a quick approval and enrollment for your group.

**1. Business eligibility documentation**

The employer group must have a defined physical location within the Kaiser Permanente service area, and maintain an active business license.

**2. Group application**

- Complete the group application, including a dated signature, within ninety (90) days of the effective date.
- Complete the broker information, if applicable.

**3. First month's premium payment**

Electronic funds transfer or business check for premium amount

**4. Most recent Quarterly Wage & Tax Statement**

Groups that enroll six or more subscribers are not required to submit a Quarterly Wage & Tax Statement (QWTS).\* The QWTS must be the most recent and include all pages. Employees listed on the form must be annotated by the Group Administrator as follows:

- P/T = Part time
- E = Enrolling
- WP = Waiting period
- W = Waiving
- T = Terminated

If no current QWTS, submit one of the following documents listed below:

- Copy of the most recently issued payroll records
- Two most recent pay stubs or a W-4 form for newly hired employees not on the Quarterly Wage & Tax Statement
- Employer letter (signed and dated) if owner is taking a draw from the company or does not appear on the Quarterly Wage & Tax Statement

**5. Kaiser Electronic Eligibility List (KEEL) or employee enrollment forms**

**6. Employee waiver forms**

Employee waiver forms do not need to be submitted to Kaiser Permanente for KEEL.

**7. Composite rate**

Completed composite rate form must be attached, along with a quote.

\* Kaiser Permanente reserves the right to request additional and/or satisfactory documentation to verify that a group applicant and its employees meet all eligibility criteria, and to cancel a Small Group Employer Application when such documentation is not provided.

Group name: \_\_\_\_\_

Effective date: \_\_\_\_\_ Group number: \_\_\_\_\_ State: \_\_\_\_\_

KP sales professional: \_\_\_\_\_ Broker name: \_\_\_\_\_

## Additional enrollment tips

### 1. Service area

Confirm group has a defined physical location within the Kaiser Permanente service area.

### 2. Business eligibility verification

Virginia Business License Information System research site:

<https://sccefile.scc.virginia.gov/Find/Business>

Maryland Business License Information System research site:

<https://egov.maryland.gov/BusinessExpress/EntitySearch>

### 3. Full-time equivalency

Confirm employer group has 50 or fewer full-time equivalent (FTE) employees.

[www.healthcare.gov/shop-calculators-fte](http://www.healthcare.gov/shop-calculators-fte)

### 4. Quarterly Wage & Tax Statements

Maryland: Form DLLR/OUI 15

Virginia: Form VEC FC 20/21

### 5. Declining coverage—participation requirement

A minimum of all eligible employees must have health plan coverage (60% in Maryland, 70% in Virginia).

### 6. Summary of Benefits and Coverage (SBC) for Kaiser Permanente plans

<https://account.kp.org/broker-employer/resources/broker/floating/summary-benefits-coverage>

### 7. Prior group with Kaiser Permanente

Groups that were previously with Kaiser Permanente will be responsible for paying any outstanding premium balance.

### 8. Sales quoting

<https://mas.kpquote.com>

### 9. Field sales guide

<https://account.kp.org/broker-employer/resources/broker?region=MID>

Questions? See your Kaiser Permanente sales representative or call **866-523-0924**.

