

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 that can be verified. An example of documentation is a copy of the current/active business license.

2. Group application

- Complete the group application, including a dated signature of an authorized company officer
- Complete the broker information

3. Summary of Benefits and Coverage (SBC) for Kaiser Permanente plans selected

4. Most recent Quarterly Wage & Tax Statement, payroll records, pay stubs, W-4, letter

Groups that enroll six or more subscribers are not required to submit a Quarterly Wage & Tax Statement.* The Quarterly Wage & Tax Statement must be the most recent and must include a full quarter of data. 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

Copy of the most recently issued payroll records

Two most recent pay stubs and 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. Employee enrollment forms

6. Employee waiver forms

7. First month's premium payment

Business check for premium amount

* 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:

<http://charter.dat.maryland.gov>

3. Full-time equivalency

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

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 (MD: 60%; VA: 70%) all eligible employees must have health plan coverage.

6. Summary of Benefits Coverage (SBC) for Kaiser Permanente Plans

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

mas.kpquote.com

9. Field sales guide

account.kp.org/broker-employer/resources/broker?region=MID

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

account.kp.org/broker-employer/resources/broker

