

## Small Group New Business Checklist

The Submission Deadline for complete and accurate paperwork to Harvard Pilgrim is: 10 business days prior to the Effective Date for MA, RI and NH, and 5 days prior to the Effective Date for ME.

**The New Business Submission Package must include all required documents. Incomplete packages will delay enrollment process and may be rejected, and complete re-submission required.**

- ☐ ACH Authorization Form and voided business check to initiate automatic withdrawal of premium payments or Business Check and Premium Deposit Statement

\*If paying with check; send initial Premium Deposit Check to:

Harvard Pilgrim Health Care  
Premium Cash Dept. Wing B  
Attn: Binder payments  
1 Wellness Way  
Canton, MA 02021-1166

- ☐ Group Information Form ( If Domestic Partner (DP) coverage is offered, an Employer-signed DP Amendment must be included)
- ☐ Employer Group Vendor Designation Form (Requires Employer signature)
- ☐ All Enrollment Forms or Express Enrollment File\*\* (Forms require Subscriber & Employer signatures)
- ☐ All Waiver Forms (Specific form for each state. Requires Employee signature -all states-plus Employer signatures in ME & NH).
- ☐ Quarterly Tax & Wage Statement ( Most recent filing; must list Tax ID #, all employees and indication of enrolling, waiving, non-eligible, etc.). Payroll report required to show new hires (otherwise W4, and payroll report within 30 days of Eff Date).
- ☐ MA groups coming from a PEO , must submit most recent payroll and a termination letter from the PEO stating Group is terminating their entire PEO relationship with them. Please contact your Sales & Account Executive for additional questions regarding PEO sale.
- ☐ Signed Pediatric Dental Attestation if opting out of dental coverage (MA, RI & ME Only)
- ☐ Copy of the following online quoting system-generated forms for the proper Effective Date:
  - ☐ Submission of the sold quote in the broker portal

*Additional forms may be required depending on state, enrollment type, or plan election, such as: Domestic Partner Amendment; Former Spouse Amendment(ME only), Pediatric Dental Attestation(MA/ME/RI only if Pedi Dental not included), CDH File Feed Authorization and Plan Sponsor Certificate, etc.*

Please visit the broker portal library and select the appropriate state for all the latest documents. **Email the new business submission package to [HPNewBusinessSales@point32health.org](mailto:HPNewBusinessSales@point32health.org).**

### **Please note the following:**

1. MA and ME: Final rates are based on final enrollment. Upon receipt of all the completed documents, a final Rate Contract will be produced, and requires Employer/Broker signatures.
2. Individual Member ID cards will be processed, generated, and mailed within 7-10 business days from when the Welcome letter is sent out.
3. Harvard Pilgrim Health Care must have a completed enrollment form, electronic enrollment file or waiver form for all eligible employees to calculate participation.