



# Small Group (<51 Full Time Equivalents) Enrollment Checklist

Submission deadline for complete and accurate paperwork to Harvard Pilgrim is: 10 business days prior to the effective date for MA, CT and NH if submitted in HPOQ, otherwise 15 business days NH, and the 25th of the month for ME.

**The New Business Submission Package must include the following documents. We will return the paperwork if information is missing and a new submission will be needed:**

- Group Information Form (MA & ME: Dental info must be supplied if purchasing w/o Pediatric Dental)
- Check and Premium Deposit Statement **OR** ACH Authorization Form and voided check to initiate direct withdrawal of premium payments\* (**Not required for MA or CT**).
- All Enrollment Forms or Express Enrollment File\*\* (forms require subscriber & employer signatures if not submitted by broker via Express Enrollment tool)
- All Waiver Forms\*\* (requires employee (CT, MA, ME & NH) & employer signatures (CT, ME & NH only))
- HIPAA Identification of Third Party Representatives Form (Requires employer signature; gives permission for brokers to access group information through *HPHConnect*)
- Quarterly Tax & Wage Statement (most recent copy; must list all employees) **OR** another allowable proof of business documentation. (For MA Only: HPHC Small Business Confirmation Form may also be acceptable if a WR-1 is not available) \*\*\*
- Please supply copies of the following online quoting system-generated forms:
  - Quote and census (denoting COBRA participants) for MA,
  - For NH only (if submitted online): Confirmation of participation attestation, and Rate Contract signed by employer and broker,
  - For CT only: Benefit Central quote signed by employer,
  - For ME only: (if elected) Former Spouse Amendment.

Additional forms may be required depending on enrollment type or plan election, such as: Domestic Partner Affidavit & Amendment; CDH File Feed Authorization. All forms can be found on [www.harvardpilgrim.org/Brokers](http://www.harvardpilgrim.org/Brokers).

## Email or mail the new business submission package to your Sales Executive:

CT groups	MA groups	ME groups	NH groups
<b>Harvard Pilgrim Health Care of Connecticut</b> Sales Department City Place II, 185 Asylum St., 2 <sup>nd</sup> Fl, Hartford, CT 06103	<b>Harvard Pilgrim Health Care</b> Sales Department 93 Worcester Street Suite 100 Wellesley, MA 02481	<b>Harvard Pilgrim Health Care</b> Sales Department 1 Market Street 3 <sup>rd</sup> Floor Portland, ME 04101	<b>Harvard Pilgrim Health Care of New England</b> Sales Department 650 Elm Street 7 <sup>th</sup> Floor Manchester, NH 03101

### 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. **This final Rate Contract contains the final premium rates and must be signed by the group and returned to your Sales Executive to finish the set-up process. New coverage is not considered to be "in force" until Harvard Pilgrim is in receipt of the final Signed Rate Contract.**
2. **NH and CT:** Ensure you submit the Signed Rate Contract obtained from the quoting tool alongside all other required documentation at the time you submit the complete package, otherwise a final Rate Contract will have to be produced and must be signed by employer, then returned to your Sales Executive to finish the set up process which will add to the processing time.
3. Individual Member ID cards will be processed, generated and mailed within 7-10 business days from when the group was set up.

\*Harvard Pilgrim will not allow ACH from personal checking accounts. **For CT and MA** binder check is not required, ACH form is optional.

\*\***MA, ME, NH and CT**– Harvard Pilgrim must have a completed enrollment form, electronic enrollment file or waiver form for all eligible employees to calculate participation. Failure to supply all enrollment & waiver information may result in delay of group set-up and member enrollment.

\*\*\* **For NH and CT:** Identify on the employee listing if they are enrolling, waiving, non-eligible, etc. and ensure all employees have an enrollment or a waiver form.