

## 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 **mas-small-group-new-business@kp.org**. 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 and quote**

- Complete the group application, including a dated signature, within ninety (90) days prior to the effective date.
- Include a copy of the signed group quote.
- Complete the TPA, GA, and broker information, if applicable.

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

Use the ACH form. ACH withdrawals will be made within 3 to 7 days from the date of the group application approval.

**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
- T = Terminated
- W = Waiving
- WP = Waiting period
- E = Enrolling

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 QWTS

Employer letter (signed and dated) if owner is taking a draw from the company or does not appear on the QWTS

**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. A minimum of two subscribers is required in each plan for which a group is billed using composite premium-rate equivalent methodology. (Please reference page 14 of the Field Sales Guide.)

\*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**.

