



New Business 1-50 New Case Checklist:

- **Group Contract Application** (Include Broker's Signature on Contract Application; Group E-mail Address)
- **Enrollment Forms** (A form for each: Medical and Dental/Vision)
- **Completed Census Template**
- **Waiver Forms** (if applicable)
- **FTE Form** (For all lines of coverage)
- **MSP Form** (Medicare Secondary Payer Calculation Form)
- **H S A Late Form** (if applicable)

- **Most Recent Quarterly Wage & Tax Statement**

(Must be reconciled – A for Application, W for Waiver, PT for Part-time, S for Seasonal, T- Termed etc.):

*Please note that payroll registers will be accepted in lieu of the most recent wage and tax statement when payroll register is filed as an amendment. This option should only to be exercised on an exception basis when the Wage and Tax is not available. If a payroll register is provided, it must be generated by a payroll service and must not be generated by software via desktop computers.

- **W-4 - New Hires and Newly Formed Corporations**

- **Signed & Dated CareFirst Rate Sheet** (submit with Health Connect quote and we will send a finalized CareFirst Proposal)
- **Check for one month's Premium (Made payable to CareFirst, Inc.** Wait until you receive the final rate sheet (that needs a signature) to make sure binder check matches the monthly premium exactly.