

NEW ACCOUNT SET UP CHECKLIST

ACCOUNT NAME _____

EMPLOYEE PRESENTATION DATE(S) _____

ENROLLMENT DATE(S) _____

OPENER(S)% _____

ENROLLER(S) _____

COORDINATOR _____

___ MASTER APP SIGNED AND SUBMITTED TO HO

___ SECTION 125 SIGNED AND COMPLETELY FILLED OUT

___ SPECIFIC CUSTOMER RATE SHEETS PROVIDED FOR DATABASE ENROLLMENT MATCH

___ WELCOME CALL COMPLETE WITH BCN, CAN, CED, PED, RISK AND PAY PERIODS PROVIDED

___ AD&D ELIGIBLE YES ___ NO ___

___ IF YES, REQUEST SENT TO HO FOR APPROVAL

___ IF APPROVED, TRUST AGREEMENT SIGNED BY CUSTOMER AND SUBMITTED TO HO

___ GOOGLE CALENDAR UPDATED

___ ENROLLERS INFORMED WITH DATES, TIME AND ENROLLMENT LOCATION

___ CSUS COMPLETE AND SUBMITTED

___ DATABASE BUILT

___ EMPLOYEE PACKETS BUILT. NUMBER NEEDED? _____

___ SPANISH REQUIREMENTS YES ___ NO ___ IF YES, DETAILS. _____

___ WELCOME EMAIL/PACKET SENT TO PA AFTER ENROLLMENT.

___ ELECTION FORMS PULLED AND EMAIL SENT TO PA. DATE _____

___ AGENT(S) DELIVERED ELECTION FORMS AND REVIEWED BILLING. DATE _____

___ UNDERWRITING ISSUES CLEARED?

___ ACCOUNT ADDED TO CALL SHEET FOR BI-MONTHLY CONTACT