



GROUP INSURANCE INCORPORATED
Insurance Services of America | Seniors Advisory Services

GUIDELINES TO FOLLOW FOR SUBMITTING NEW BUSINESS GROUPS:

- 1) Need copy of their IRS letter notification indicating their TAX ID #.
- 2) Need copy of their LLC/CORP documents.
- 3) Information for group must be 'in good standing' in the Secretary of State website.
- 4) Employer Group Application must be completed, see attached.
- 5) Employer's most recent 'QUARTERLY REPORT OF WAGES PAID', i.e. SUTA, State Quarterly Wage & Tax Report must be submitted and every employee must be noted with their eligibility, i.e., full time, part time, terminated, etc.
- 6) Employee Applications must be completed for each employee enrolling. Waivers must be submitted for employees not enrolling due to other coverage, etc.
- 7) Signed group sold quote needed.
- 8) Premium deposit check in the amount of the quote must be submitted, PAYABLE TO BLUE CROSS.

IF your group is replacing another group policy currently in force, AND wants deductible credit for portions already satisfied, the group must also submit a copy of the most recent billing statement. INDIVIDUALS TRANSFERRING TO A GROUP POLICY FROM AN INDIVIDUAL POLICY WILL NOT HAVE DEDUCTIBLE CREDIT FOR ANY PORTION SATISFIED ON THEIR INDIVIDUAL POLICY. THEIR DEDUCTIBLE WILL START OVER WITH THE NEW GROUP POLICY AND WILL BE APPLICABLE ON A CALENDAR YEAR BASIS.





GROUP INSURANCE INCORPORATED
Insurance Services of America | Seniors Advisory Services

GUIDELINES TO FOLLOW FOR SUBMITTING NEW BUSINESS GROUPS

WHERE **HUSBAND & WIFE** ARE THE ONLY EMPLOYEES OF THE GROUP:

- 1) Need copy of their IRS letter notification indicating their TAX ID #.
- 2) Need copy of their LLC/CORP documents indicating they are the owners.
- 3) Owner information must be 'in good standing' in the Secretary of State website.
- 4) Need attached letter transferred to group letterhead, if available, or just type in group name and address at the top of the page and complete information in *ITALICS within the letter*.
- 5) Employer Group Application must be completed, see attached.
- 6) Employee Applications must be completed for each person.
- 7) Signed group quote needed.
- 8) Premium deposit check in the amount of the quote must be submitted, PAYABLE TO BLUE CROSS.

INDIVIDUALS TRANSFERRING TO A GROUP POLICY FROM AN INDIVIDUAL POLICY WILL NOT HAVE DEDUCTIBLE CREDIT FOR ANY PORTION SATISFIED ON THEIR INDIVIDUAL POLICY. THEIR DEDUCTIBLE WILL START OVER WITH THE NEW GROUP POLICY AND WILL BE APPLICABLE ON A CALENDAR YEAR BASIS.



**GROUP LETTERHEAD, OR JUST TYPE IN NAME OF BUSINESS WITH ADDRESS AS
HEADING OF THIS LETTER**

Date

To whom it may concern:

Please be advised that the only current employees of *(name of llc/corp)* are *(full names of owners)*.

If I can be of further assistance, please do not hesitate to contact me.

Sincerely,

Owner's Signature

Owner/President