

## **New Group Checklist 2-50 Eligible Employees**

**Thank you for your new group submission.** The following pieces of information are required when submitting a new case to UnitedHealthcare.

### **Group Name** \_\_\_\_\_

- A **check** in the amount of the first month's premium (approximate amount is acceptable) *payable to: UnitedHealthcare of Illinois, Inc.*
- Completed UnitedHealthcare **Illinois Small Business Employer Application**.
- Copy of the most recent **billing statement** from the current carrier.
- Copy of the most recent **Quarterly Wage & Tax Statement** (employee roster portion). Indicate status of all employees listed (full-time, part-time, terminated, etc.) **In lieu of the most recent Quarterly Wage & Tax Statement, the following is needed if you are:**
  - "C" Corporation - Articles of Incorporation, Form 1120, current wage and tax or current payroll records.
  - "S" Corporation - Articles of Incorporation, Form 1120S, K-1s on owners/partners, current wage and tax or current payroll records. (Only the shareholders of an S Corporation may collect dividends as all or a part of their wages.)
  - Partnership - Partnership agreement, Form 1065 and K-1s on the partners of the partnership, current wage and tax or current payroll records (if employees are not partners). Only the partners of a partnership can take a draw from the company and still be considered an eligible employee.
  - Sole Proprietorship - Business license (if in business less than one year and a Schedule C has not been filed yet) or Schedule C, and current payroll records for employees other than the owner. Only the owner of a sole proprietorship can take a draw from the company and still be considered an eligible employee.
  - Limited Liability Company (LLC) - LLC agreement; Either C Corporation or Partnership documentation (see above).
  - Church - Form 941 and current payroll records.
  - Farm - Schedule F; current payroll records.

**Individual enrollment application forms** for all eligible employees: Medical History section is required for all medical and/or life applicants, including employees in a waiting period. Please make sure all applications are signed and dated.

**Send your new case submission to your UnitedHealthcare Account Executive or General Agency.**

Please note: The UnitedHealthcare Medical Underwriting Department reserves the right to request different or additional documents as they deem necessary.