

Sold Case Checklist

Thank you for choosing Ameritas Group to provide group dental and/or eye care for your client.

We have provided the following guideline as a reference to ensure the enrollment process is smooth and efficient.

The following items are required for sold cases:

- ✓ Completed Application for Group Insurance
- ✓ Binder Check (estimated first month's premium)
- ✓ Completed Enrollment forms and Waiver forms

Instructions and Information

Group Application

- Please confirm application is **fully** completed with emphasis on the desired waiting periods and new hire effective dates. There are several options for effective/termination dates for new hires. They include 1) first of the month effective dates, end of the month terminations, 2) immediate effective dates and terminations, or 3) other. (Please describe "other" in detail on application)
- If there is divisional billing (separate invoice for each division), we will need the name, address, telephone number and contact name for each division. If departmental billing is required (departments listed on one bill), we will simply need the name of each department. *Each enrollment form should indicate which division and/or dept is applicable if there is divisional and/or departmental billing.*
- If Voluntary, Section 125 Plan Year and the election period should be indicated on Application.
- Please include the Plan Design and Rates that sold.

Enrollment Forms

- ❑ **All** eligible employees should complete an enrollment form, even if waiving coverage.
- ❑ Enrollment forms should contain all necessary information, including:
 - social security number
 - complete address
 - date of birth
 - date of hire
 - dependent coverage if any
 - employees' signatures
- ❑ If an employee is waiving coverage, please verify if waiving due to other group dental coverage and indicate this on the waiver section of the enrollment form.
- Other formats of enrollments may be used in lieu of forms. Please contact us for requirements.

Binder Check

- ❑ The Binder check should be in the amount of the estimated first month's premium, made payable to Ameritas.

Miscellaneous Information

- ❑ If dental plan sold is Tied to Medical, please include a copy of the medical carrier's current invoice.
- Once home office is in receipt of the **ALL** completed Sold Case Materials, the sold case process should complete **within** 10 business days. Once the case is approved, the administrative kit, certificate and ID cards will be shipped UPS ground (3-5 business days) to the policyholder. (If requested, we will send this information to the broker).
- Please note ID cards are not available with the Focus (VSP) Eye Care Plans. Employees will receive a brochure and information on how to use the Plan.

Ameritas Group now offers eServices, our real-time online enrollment and billing. Share the attached flyer with your group to discuss these exciting free services. If your client is interested in eServices, let us know during the sold case process. If the group is eligible, an Ameritas Group representative can contact them about set-up procedures.

Ameritas Group also offers payroll deduction billing for voluntary groups. We have the ability to generate list billings for groups that payroll deduct 12, 13, 24, 26 and 52 times a year. This feature will take these payroll cycles into consideration when doing mid-month adds, terminations or changes. If the employer selects the first of the month effective dates and end of the month termination dates, we must bill for the entire month.

We will notify you immediately once the case is approved and a group policy number has been assigned.

We appreciate your business with Ameritas Group and please do not hesitate to contact us with questions.