

Small Group Intake Checklist

HMO and/or POS Business



Group Name _____

Needed at time of enrollment

- Employee applications for each eligible employee
- Current WI Wage & Tax Statement (UC-101) with employee status indicated next to each employee's name: FT=full-time, T=terminated, PT=part-time
- Aspirus Health Plan quote showing sold rates and age rate matrix
- Completed employer application
- Signed disclosure notice on Aspirus Health Plan rating factors renewability
- Initial monthly premium:** Groups that choose the direct billing option will receive a statement in the mail and should make payment at that time. If they choose automatic premium withdrawal, we will withdraw the first month's premium from the ACH account.

Send enrollments to:

Aspirus Health Plan
3000 Westhill Drive, Suite 303
Wausau, WI 54401

Quotes@aspirushealthplan.com
Fax: 715.843.1246

Required tax document for new group sales

Aspirus Health Plan requires the most recent State Quarterly Wage & Tax Statement (UC-101) for all new groups. If the group is not required to file a State Quarterly Wage & Tax Statement (UC-101), we need all of the items listed under the group's specific type (see subheadings below).

C Corporations

- Articles of incorporation
- Form 1120
- Payroll

Sole Proprietorship

- Business license
- Form 1040/Schedule C
- Payroll or draw documentation

S Corporations

- Articles of incorporation
- Form 1120S
- Payroll

Church

- Form 941
- Payroll

Partnership

- Partnership agreement
- Form 1065
- Payroll

Limited Liability Company (LLC)

- LLC agreement
- Documentation for C Corp or partnership, depending on how they file with the state

New Business—Has not yet filed a wage & tax report

- Articles of organization or incorporation
- Payroll

Farmers—other than a corporation or partnership

- Schedule F, itemization of line 24
- Copies of W-2s for all employees