

Aspirus Health Plan Small Group Intake Checklist

GROUP NAME: _____

HMO AND/OR POS BUSINESS

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
- Completed employer application
- Signed disclosure notice on Aspirus Health Plan rating factors renewability
- Initial monthly premium: Groups that choose the direct billing option should submit their premiums with their enrollment. 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
 Sandra.ferg-weisner@aspirushealthplan.com

REQUIRED TAX DOCUMENTS 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 <ul style="list-style-type: none"> • Articles of incorporation • Form 1120 • Payroll 	Partnership <ul style="list-style-type: none"> • Partnership agreement • Form 1065 • Payroll
Sole Proprietorship <ul style="list-style-type: none"> • Business license • Form 1040/Schedule C • Payroll or draw documentation 	Limited Liability Company (LLC) <ul style="list-style-type: none"> • LLC agreement • Documentation for C Corp or partnership, depending on how they file with the state
S Corporations <ul style="list-style-type: none"> • Articles of incorporation • Form 1120S • Payroll 	New Business—Has not yet filed a wage & tax report <ul style="list-style-type: none"> • Articles of organization or incorporation • Payroll
Church <ul style="list-style-type: none"> • Form 941 • Payroll 	Farmers—other than a corporation or partnership <ul style="list-style-type: none"> • Schedule F, itemization of line 24 • Copies of W-2s for all employees