



# California Small Business 2-50 broker checklist

## Requirements for submissions

At UnitedHealthcare, we are committed to offering you great service throughout the case submission process. To help us provide you with a quick turnaround time on your 2-50 new business case submissions, we have created this checklist for your convenience. Please use this as a guide for the types and order of information we need in order to process your cases within a reasonable turnaround time. While use of this checklist is optional, we recommend you become familiar with our requirements to ensure we meet your needs in a timely fashion.

Thank you for choosing UnitedHealthcare.

**1. To help expedite the case submission process, please submit your 2-50 groups in the following order:**

- RAF promo cover sheet
- Group application
- Product selection form
- All proof of business documents**
- DE6
- Tax documents
- Payroll
- A copy of the prior carrier's bill
- Miscellaneous group items
- Employee applications in DE6 or payroll order

**Please note:**

- If you are submitting both PacifiCare and UnitedHealthcare enrollment, put in DE6 order with PacifiCare subscribers grouped together and UnitedHealthcare subscribers grouped together
- List owners first if not listed on DE6
- COBRA and new hires go to the back if not listed on the DE6
- Handwrite new hires on the last page of the DE6. Include the following information: Date of hire, social security number, complete first and last name.

- Quote, if provided
- Binder check

**2. Confirm the following items with your client and submit answers with the case:**

- Paper billing **-or-**
- Electronic billing
- Calendar year deductible **-or-**
- Policy year – Please remind policy year selectors that deductible credit is not available for policy year plans
- Would your HSA group like to utilize OptumHealth Bank<sup>SM</sup> services for their HSA banking needs?
- Ensure that ERISA is always marked “Yes”. Only churches and specialized non-profits can be marked “No”.
- Cal-COBRA marked, if under 20
- COBRA marked, if over 20
- Confirm group e-mail address is the administrative e-mail address, not executive e-mail address

**Helpful reminders:**

- Please submit single-sided copies of the application, not double-sided
- Please list total member count including dependents on the case submission cover sheet
- Confirm COBRA participants are listed on the group application