

Small Group Enrollment Checklist
LifeWise Health Plan of Oregon
For Groups Up to 50 Employees



To ensure the best service to your client, please submit completed materials by the **10th of the month prior to the desired effective date**. Incomplete materials may cause a delay in enrolling the group prior to the effective date.

1. **GROUP NAME** _____

2. **COMPLETED FORMS**—Forms are available at www.lifewiseor.com (select Producers, then Forms) or contact your Sales Representative.

- Small Group Master Application
- Small Group Master Application Benefit Selections worksheet
- Small Group Enrollment Census – signed by the Group or Producer
- Oregon Standardized Group Profile Form
- Deductible Credit Report from prior carrier
- Member Enrollment and Change Application
- Affidavit of Domestic Partner (for Domestic Partners only)
- Waiver of Coverage for every eligible employee choosing to NOT enroll (attach a copy of ID card from the other carrier)
- Waiver of Coverage for every eligible employee choosing to NOT enroll dependents (not needed for Employee Only Plans)
- Coordination of Benefits form, if applicable

3. **GROUPS WITH 3 OR FEWER ENROLLING EMPLOYEES—ONE OF THE FOLLOWING FORMS IS REQUIRED**

- Most recent Oregon State Employer’s Wage & Tax Quarterly Report (form 132), and/or
- Approved tax documentation, or
- Business Employment Verification Form

4. **THE FOLLOWING PROPOSAL INFORMATION IS REQUIRED**

- Copy of LifeWise Health Plan of Oregon quote and census pages

5. **CHECK FOR THE FIRST MONTH’S PREMIUM**

- Business check for estimated first month’s premium

6. **GROUPS PURCHASING AN HSA and HRA PLANS, MUST ALSO SUBMIT:**

These forms must be submitted by the 5th of the month prior to the month of coverage.

- Funding Account Set up Form
- Electronic Funding Authorization Form

In addition, for HRA plans we must also receive:

- Funding Account Set up Form

7. **POSTMARK NO LATER THAN THE 10TH OF THE MONTH AND SEND MATERIALS TO:**

LifeWise Health Plan of Oregon OR Fax: (503) 279-5285
2020 SW Fourth Avenue
Suite 1000
Portland, OR 97201

Comments: _____

Questions — Please contact your LifeWise Sales Representative