

Enrollment Checklist

The following items must be submitted at least 15 days prior to the requested effective date for a new case to be processed.

- 1. CBIA Health Connections Employer Participation Agreement for 51+ employees
- 2. CBIA Membership Application
- 3. CBIA membership dues check. See the dues chart on the membership application to determine your annual dues amount.
- 4. Binder check. First month's estimated premium on company check
- 5. Enrollment/Change form (for 51+ employees) for each eligible employee
- 6. Personal Health Application for life amounts over the guarantee issue
- 7. Copy of all sold quotes/proposals, signed by the employer
- 8. Prior carrier bill if group has existing voluntary coverage
- 9. Verify that classes of employees defined on a proposal are accurate, as class descriptions will be used in your Certificate Rider (Schedule of Benefits).
- 10. If electing STD or LTD coverage an original completed Tax Service Agreement must be submitted. Separate Tax Service Agreements are required if electing both coverages.
- 11. COBRA/State Continuation Service Agreement for dental and vision coverage and any Takeover Forms (if applicable)
- 12. A Domestic Partner Affidavit (if applicable) must be completed at time of enrollment and retained by the employee. A copy must be provided to the employer. Visit cbia.com for a copy of the affidavit.
- 13. CBIA Healthy Connections wellness program enrollment form (if applicable)
- 14. Registration for Online Account Access