

MorganWhiteGroup

SIMPLIFIED ENROLLMENT GUIDELINE

NO EMPLOYEE APPLICATIONS REQUIRED

The following group products may now be enrolled without taking employee applications:

Premium Saver

HSA Saver

Med Bridge Plan (when employer contributes –100% participation required)

Employer paid Vision and Dental

Takeover Dental or Vision

If the employer cannot provide the required information electronically, we will accept prior carrier enrollment cards and not require employee applications.

Add-ons and dependents for employer paid vision or dental plans will require applications unless your client elects to go on E-billing. Your client will then be able to enroll a new employee directly in the billing system.

PREPRINTED APPLICATIONS

Save Time More Accurate Enrollments Better Participation

Insurance enrollments take employees away from their job and consume a lot of the agent's time.

MorganWhite can now provide preprinted applications to simplify your enrollments (minimum of 50 eligible employees). We can also sort applications (example- by shift for production lines).

REQUIRED INFORMATION

for

No employee application enrollments or Preprinted application enrollments

The information must be provided by email or disc on an excel spreadsheet, DBF, or an ASCII file using the following format. Please send this information in separate fields; do not combine city, state, zip code, first name, or last name. Send to MorganWhite on email: robinw@morganwhite.com

Primary Insured: Social, Last Name, First Name, DOB, Address, City, State, ZIP

Dependents: Last Name, First Name, DOB, Relationship