

# Large Group Enrollment Checklist

Signed acceptance letter, sold rates and employer application, along with Exhibit B, must be completed and returned to us before group or membership can be implemented. The below guidelines are for initial new group membership setup.

## ✓ **PAPER: Estimated Turnaround: Five to Seven Business Days**

1. Email: SalesAdmin@HealthAlliance.org.
2. Fax: (217) 902-9704.

### **Critical elements for successful enrollment:**

- First name.
- Last name.
- Sex.
- Date of birth.
- Address.
- Plan selection.
- Subgroup/departments/division.
- Signature.
- Employee/dependent status, such as Leave of Absence, Disabled or Medicare.
- Social Security is required (paper applications).
- Subscriber signature is required (paper applications).
- COBRA members and the date they started COBRA.

### **Additional information we may request:**

- Other active insurance, such as Medicare A/B or coverage through spouse.
- Social Security number. This is needed for tax purposes, 1095-B forms and for mandatory Medicare reporting, Section 111.

## ✓ **CENSUS: Estimated Turnaround: Two to Three Business Days, Based on Accurate Layout**

(Can be used for initial new group membership setup or open enrollment.)

### **1. Standard layout required:**

- a. Spreadsheet with predetermined critical and noncritical fields.
- b. Each column indicates format, such as DOB.
- c. No hidden rows or columns.
- d. Don't enter waivers.

2. Email: SalesAdmin@HealthAlliance.org.

## ✓ **HIPAA-Compliant 834 Data File: Estimated Six-to-Eight-Week Turnaround Time for Initial Setup**

Please contact your account executive for additional information.

Standard 834 layout is required.

Employee can view temporary ID cards by creating an account at hally.com.

ID cards and member materials will be mailed to the employee's home address once initial membership is complete.

Please allow up to 10 business days for receipt of materials.