

Large Group Enrollment Checklist

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

✓ **PAPER: Estimated turnaround: 5 – 7 business days**

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

Critical elements for successful enrollment:

- First name.
- Last name.
- Gender.
- Date of birth.
- Address.
- Plan selection.
- Subgroup (i.e., 001 Active, 901 Retired).
- Signature.
- Employee/dependent status, such as Leave of Absence, Disabled or Medicare.

Additional information Health Alliance may request:

- Other active insurance, such as Medicare A/B or coverage through spouse.
- Primary care provider (PCP). A member must select a contracted PCP when enrolling in an HMO or POS plan.
- Social Security number. This is needed for tax purposes, 1095B forms and for Mandatory Medicare reporting, Section 111.

✓ **CENSUS: Estimated turnaround: 2 – 3 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. Policy Holder SSN and Policy Holder Flag of "Y" or "N" must be populated correctly.
2. Email: SalesAdmin@HealthAlliance.org.

✓ **HIPAA Compliant 834 Data File: Estimated 6 – 8 week turnaround time for initial setup.**

Please contact your account executive for additional information.

Standard 834 layout 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.