

Small Group Enrollment Requirements
(3 or fewer and 100% Family Related)

- ✓ Eligible employees are required to submit proof of employment documentation with enrollment materials.
 - Applicable for each employee whether enrolling or waiving group coverage
 - When determining if a group needs to submit proof of employment, do not count those employed less than 90 days (probationary period) by the group with exception to employee(s) replacing previous employee(s).

- ✓ All (100%) family related groups are required to submit proof of employment documentation.
 - Acceptable documentation for each eligible employee:
 - Schedule SE from 1040 along with Schedule C, E, or F
 - W-2
 - 1099
 - Payroll records that clearly identify the group as an eligible employer
 - Form 132 - owners, partners, sole proprietors, and employees not listed on the form will need to supply supporting documentation.

- ✓ Groups with 100% enrolling employees or members residing and working in the Providence Health Plan's (PHP) EPO Service Area may choose a Personal Option or Open Option product.

- ✓ Groups with 33% or less of enrolling employees or members residing and working outside of PHP's EPO Service Area but who are residents within Oregon or Washington may choose a Personal Option product.

- ✓ Groups with 49% or less of enrolling employees or members residing and working outside of PHP's EPO Service Area may choose an Open Option product.

- ✓ Other guidelines to remember:
 - Incomplete new group submissions will be returned to the agent
 - Waiver information required for all eligible employees waiving group coverage
 - Deadline for enrolling new groups for the 1st of the month is the 25th of the month prior to the effective date
 - Deadline for enrolling new groups for the 15th (mid-month) effective date is the 10th of the month of the effective date
 - All groups enrolling for the 15th of the month are required to submit one and a half months premium payment with enrollment materials.

(Producer Signature)

(Date)