



Health Alliance for Technology  
New Group Submission  
Requirements

Wells Fargo Insurance Services

**WARNING: Groups must submit their renewal or new group paperwork by the 15<sup>th</sup> of the month prior to their effective date. If paperwork is received after that date, they will not be able to participate in the wellness program the first month of their plan year. They will be required to wait until the next month to begin the program.**

Required materials must be submitted and include all of the following (no partial submissions will be accepted).

- ☑ **Binder Check**
  - Make check payable to "ALLtech"
- ☑ **Group Master Application**
  - The Group Master Application must be completed to indicate the Compulsory Benefit Selection(s), Bundled Product Selections, Eligibility and Participation Requirements, TEFRA, COBRA and FMLA Designation, Prior Coverage Information, Sold Rates and the Wellness Program designation. The Group Master Application must be signed by both the group and the producer.
- ☑ **Updated Group Health Risk Questionnaire**
  - All new group paperwork must include an updated ALLtech Group Health Risk Questionnaire (HRQ). No groups will be processed without this information provided.
    - The HRQ must be the AET HRQ (alternative or outdated ALLtech HRQs **will not** be accepted).
    - The updated HRQ must be signed by the same group representative and producer who sign the Group Master Application (GMA). We will not accept the name and title of the group representative and that it was a phone interview in lieu of the signature for new group submissions.
    - It must be dated the same date as the GMA and signed by the same group representative and producer.
    - The HRQ will not be accepted without all questions answered. If an answer is zero ("0"), then include that in the field. If the group or the producer has no knowledge of the information being requested, include "Not available" in the comment field of each such question.
    - Include any and all information already provided and that may have been vetted out during the quoting process.
    - Please be sure that you are using the most current HRQ (found in the forms library at [www.alltechbenefits.com](http://www.alltechbenefits.com) as **old versions will not be accepted.**
- ☑ **NEW PROCESS - NO EXCEPTIONS WILL BE MADE.**
  - All newly sold groups must submit a copy (all pages, including grand totals) of the most recent state Quarterly Wage and Tax Report (QWR)/Form 5208, unless eligible to submit payroll records as stated below.
  - Employer must indicate employment or eligibility status for each employee listed on the submitted Form 5208: A (any employee submitting an Application), W (Waiving), P/T (Part-Time), T (Terminated/including termination date), S (Seasonal), and WP (Waiting Period).



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- **Payroll Records**
  - For groups that have not yet filed a Form 5208 or have been in business more than one year, a current two-week payroll statement (all pages, including grand totals) may be submitted in lieu of a Form 5208. Indicate employment or eligibility status for each employee listed on the submitted payroll: A (any employee submitting an Application), W (Waiving), P/T (Part-Time), T (Terminated/include termination date), S (Seasonal) and WP (Waiting Period). If a two-week pay period date/payroll statement is submitted (listing all employees), it must include totals of employee wages paid, withholdings and grand totals. Separate sheets or individual pay stubs are not acceptable.
- **Proof of Ownership**
  - In addition to the above wage and tax information, owner-only groups (without a QWR) would require proof of ownership/tax documentation for all owners/officers/partners enrolling.

Type of Business	Required Documentation
Corporations	<ul style="list-style-type: none"> <li>○ In business &lt; 1 year: Articles of Incorporation listing all enrolling officers' names</li> <li>○ In business &gt; 1 year: S-Corps: IRS Schedule K-1 (Form 1120s) for all enrolling Owners/Officers</li> <li>○ C-Corps: IRS Form 1120 (pages 1 &amp; 2) which includes "Schedule E"</li> </ul>
Partnership/LLP	<ul style="list-style-type: none"> <li>○ In business &lt; 1 year: Partnership Agreement signed by all partners.</li> <li>○ In business &gt; 1 year: IRS Schedule K-1 (Form 1065) for all enrolling partners or a Partnership Agreement signed by all partners</li> </ul>
Limited Liability Company (LLC)	<ul style="list-style-type: none"> <li>○ In business &lt; 1 year: LLC Agreement signed by all managers/members parties</li> <li>○ In business &gt; 1 year: LLC Agreement signed by all managers/members/parties or copies of appropriate tax returns (follow the guidelines for a Partnership or Sole Proprietorship based on how the LLC was formed)</li> </ul>
Sole Proprietorship	<ul style="list-style-type: none"> <li>○ In business &lt; 1 year: Business License</li> <li>○ In business &gt; 1 year: IRS Schedule C (Form 1040)</li> </ul>
Farms	<ul style="list-style-type: none"> <li>○ IRS Schedule F (Form 1040)</li> </ul>
Common Ownership	<ul style="list-style-type: none"> <li>○ Group's attorney or CPA must complete a UnitedHealthcare standard form regarding Common Ownership</li> </ul>

- ☑ **Enrollment & Waiver Forms**
  - Use the enrollment form to waive coverage by marking appropriate boxes provided.
  - Due to new CMS requirements, Social Security Numbers for all Employees and their dependents must be included. No "Dummy" numbers will be accepted and the group will not be processed until all are present.
  - When COBRA carry-over enrollees are eligible, the COBRA Carry-Over Election Form must be completed by each COBRA participant electing coverage with the ALLtech. The form must be submitted in a timely manner to prevent delays.



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- ☑ **Deductible Credits** can be applied with proof of Deductible payment through the latest EOB.
- ☑ **If ALLtech “Preferred” rates are selected: Membership with an ALLtech Endorsed Sponsor must be obtained prior to submission of the new case. Confirmation of secured membership must be documented on the Group Master Application (GMA) where indicated.**
  - Current ALLtech Endorsed Sponsors are:
    - **Washington Technology Industry Association (WTIA)**
      - For more information on the benefits of WTIA membership and how to join, please visit: [Benefits of WTIA Membership](#)
      - **The WTIA Membership** application can be found at: [WTIA Membership Application](#)