

Anthem SOCA Benefit Plan Sold Case Checklist 2-50 ATNE

EMPLOYER COMPLETES/ PROVIDES VIA FORMFIRE

- SOCA Benefit Plan Participation Agreement**
- SOCA Benefit Participating Business Acknowledgement Agreement**
- SOCA Benefit Plan Employer Application**
- Annual Rate and Census Reconciliation (change effective 5/15/19)**
- Signed rates, benefits, and quote stipulations**
- Anthem Excel census enrollment template (IMO1)**
- Proof of chamber membership**
Acceptable formats:
 - Letter from the Chamber of Commerce stating the employer is a member in good standing. Letter must be on letterhead that is specific to the employer's declared chamber.
 - An email from the employer's declared Chamber of Commerce stating that the employer is a member in good standing. The email must specify the sender's name and title, and must also show the sender's email address, date, and time stamp. It is acceptable for the broker to obtain this email from the Chamber of Commerce on behalf of the client and to forward it to SOCA.
 - A copy of a cancelled check or credit card receipt that indicates payment of membership dues in the employer's declared Chamber of Commerce.
- SOCA Benefit Plan Electronic Funds Transfer (EFT) banking form and voided check REQUIRED** – First month's premium will be withdrawn via EFT

Notes: Incomplete documents will be returned to you for completion and incomplete submissions will delay the effective date. We require a minimum of 20 days for processing a new case submission. The 20-day period begins when all checklist items are received in our office with no missing information.

Submission Deadline: Must be submitted via Formfire by the 15th of the month prior to the effective date.

EMPLOYEES COMPLETE VIA FORMFIRE:

- SOCA Benefit Plan Employee Applications with medical** – all *eligible* employees are required to submit an application even if covered by the same group on their spouse's plan.

Small But Important Notes:

- Application signatures are good for 90 days.
- All admin changes will be through FormFire
- Group will renew each year on May 1.
- Rates subject to change based on final enrollment (if different than quoted).
- \$3 PEPM charge in addition to chamber fee. One time a year charge. Charged until May 1 with initial enrollment regardless of groups start date.
- 75 percent participation required after valid waivers.
- Notify Cornerstone via email once group has been submitted for a sold group in FormFire. This will help with tracking.
- **Once welcome letter is received, send the following documents to Info@JoinSoca.com:**
 - Plan Participation Agreement
 - Participating Business Acknowledgement Agreement
 - Signed Rates
 - Proof of chamber membership

Dental Sold Case Submissions:

- Dental master employer applications**
- Dental enrollment template**
- Signed rates and benefits**
- Dental customer checklist**
- Proof of chamber membership**
- SOCA Benefit Plan Electronic Funds Transfer (EFT) banking form and voided check**

Vision Sold Case Submissions:

- Vision enrollment template**
- Employer application (51+ Fully Insured Application)**
- Signed rates and benefits**
- Dental customer checklist**
- Proof of chamber membership**
- SOCA Benefit Plan Electronic Funds Transfer (EFT) banking form and voided check**

Life/Disability Sold Case Submissions:

- Life & Disability enrollment template**
- Employer application (51+ Fully Insured Application)**
- Signed rates and benefits**
- Dental customer checklist**
- Proof of chamber membership**
- SOCA Benefit Plan Electronic Funds Transfer (EFT) banking form and voided check**
- Hold Harness Agreement**