



Checklist for Prospective / Final Rates

Cases with 1-25 Eligible Employees:

Prospective:

- Group Name & Address
- Census with employee zip codes
- Effective Date
- Current Benefits

Final Rates:

- Group Information Request.
- Employer's Most Recent Quarterly Tax and Wage Report (Reconciled)
(W-4 required for new employees not on Tax and Wage report)
- 1 – 25 Enrollment Form/Statement of Health or Waiver for each eligible employee
- Binder Check for the first month premium
- Current carrier bill for the month prior to WellPath effective date and a bill from 12 months ago

Cases with 26-50 Eligible Employees:

Prospective:

- Group Name & Address
- Census with employee zip codes
- Effective Date
- Current Benefits Rates and Renewal

Final Rates:

- Group Information Request
- Employer's Most Recent Quarterly Tax and Wage Report (Reconciled)
(W-4 required for new employees not on Tax and Wage report)
- 26+ Enrollment Form or Waiver for each eligible employee
- Completed Signed WellPath Risk Appraisal Questionnaire
- Current / Renewal Rates
- Binder Check for the first month premium
- Current carrier bill for the month prior to WellPath effective date and a bill from 12 months ago

Cases with 51+ Eligible Employees:

Prospective:

- WellPath Risk Appraisal Questionnaire (RAQ) completed and signed by the Benefits Administrator
- Census with Employee Zip Codes
- Current Benefits Rates and Renewal

Final Rates:

- WellPath's Risk Appraisal Questionnaire (RAQ) completed and signed by Benefits Administrator
- Census with Employee Zip Codes
- Prior carrier's bill
- Current Benefits
- Current / Renewal Rates
- Current carrier bill for the month prior to WellPath effective date and a bill from 12 months ago