



Group Dental New Business Guidelines

Selling Group Dental from the brochure:

1. Complete Group Master Application signed by employer and agent.
2. New Business Transmittal completed by the agent.
3. An enrollment card completed and signed by each person enrolling.
4. A check for the first month premium, if possible.
5. A Quarterly Wage & Tax Report is required for each Unique Edge plan sold.

Submitting a group with **“takeover”** benefits (either a Unique Edge plan with 25 or more enrollees; or a quoted voluntary group):

All of the above plus:

1. A copy of the most recent billing statement from the prior carrier.
2. The original effective dates with the prior carrier for each employee eligible for “takeover” benefits.
3. A copy of the prior carrier’s benefits.
4. A copy of the “takeover” quote, if quoted.

| Documentation Requirements | No Deductible Premier | Edge Premier | Edge Plus Plan A | Edge Plus Plan B | Immediate Edge Plan A | Immediate Edge Plan B | Basic Plus | Unique Edge Plan A | Unique Edge Plan B |
|--|-----------------------|--------------|------------------|------------------|-----------------------|-----------------------|------------|--------------------|--------------------|
| Group Master Application (signed by agent & officer of group) | X | X | X | X | X | X | X | X | X |
| New Business Transmittal (completed by agent) | X | X | X | X | X | X | X | X | X |
| Enrollment card for each enrollee (signed by employee) | X | X | X | X | X | X | X | X | X |
| Waiver of Coverage on back of enrollment card signed by employee when declining coverage | | | | | | | | X | X |
| A check for the first month premium | X | X | X | X | X | X | X | X | X |
| Copy of last billing statement from prior carrier* | * | * | * | * | * | * | | * | * |
| The original effective dates with the prior carrier for each enrollee* | * | * | * | * | * | * | | * | * |
| A copy of the prior carrier’s benefits* | * | * | * | * | * | * | | * | * |
| Most recent Quarterly Wage & Tax Report* | | | | | | | | X | X |
| A copy of the quote, if applicable | X | X | X | X | X | X | X | X | X |

*Only required when selling “takeover.”