



Enrollment Prep Worksheet

Employer Decisions

- ☐ Company Name _____
- ☐ Choose Carriers _____
- ☐ Choose Plans _____
- ☐ Employer Contribution _____
 - ☐ Health Insurance _____
 - ☐ Benefits Bank _____
- ☐ Eligibility
 - ☐ Full Time _____
 - ☐ Part Time _____
- ☐ New Hire Waiting Period _____
- ☐ Are there different Job Classifications? _____

Items Needed for Enrollment

- ☐ Employee Census (All information complete)
- ☐ Employee Roster (Contact information for employees completed)
- ☐ Payroll Company _____
- ☐ Send Deductions To _____

If Health Insurance is included in Enrollment the following information is needed:

- ☐ Quarterly Wage and Tax Statement _____
- ☐ Workers Compensation Carrier _____
- ☐ How Many Years in Business _____
- ☐ Company Structure (LLC, S Corp, C Corp, Other) _____