



## NEW CASE CHECKLIST

In order that we may give you the best service possible when processing a new quote, please make sure to include everything on the list set out below.

- A fully completed and signed **Multi Benefit Plans Trust Employer Application**.
- Employee Applications** for all eligible employees.
- Waiver Forms** on all employees and dependents not enrolling for coverage **because of other group dental and/or vision coverage**.
- Declination Form** for all dependent units not enrolling.
- A **DE-6** (California State Quarterly Wage Report) form, for groups of fewer than 10 employees, for the most current quarter. Please indicate the status of each employee listed on the wage report: Full-time (FT); Part-time (PT); Terminated (T); Seasonal (S); Waiving Coverage (W) and In Waiting Period (WP). If an employee is terminated, state their exact termination date. Provide payroll records for all eligible full-time employees who do not appear on the wage report.
- Please indicate the **names of eligible owners or partners who do not appear on the quarterly wage report**.
- Employer's check for the first month's premium**, made payable to **Multi Benefit Plans Trust**.
- Finally, please complete the **Producer's Statement** on the back of the employer application so we can better serve you and your client.
- Copy of producer's license when it is the first case sold for **Multi Benefit Plans Trust**

Thank you for taking the time to complete the checklist, and we look forward to working with you again soon!

Best regards from your dedicated New Case Acceptance Department.

Member Services (800) 308-5443

**NOTE: Please submit cases as early as possible to the administrative office with the desired effective date. DeltaCare USA (DHMO Program): Enrollments by the 13th of the prior month and Delta Dental PPO (Dental PPO Program) by the 20<sup>TH</sup> of the prior month.**

*Administrative Office: 1000 North Central Avenue - Suite 400 - Glendale, California 91202*

*(800) 308-5443 - Fax (818) 243-5346*