AmeriShare New Case Submission Checklist

1. ☐ A fully completed, signed and dated, Employee Enrollment/Refusal Form or Employee Refusal Form for **<u>all</u>** eligible employees, including **<u>all</u>** employees in their waiting period.

2. ☐ A Single Employer Self-Funded Plan Specifications and request for Insurance quote form completed, signed, and dated by an owner or corporate officer of the company.

3. ☐ The most recent current carrier's billing statement and the current carrier's billing statement from 12 months prior.

4. ☐ The most recent Quarterly Wage & Tax Report.

5. ☐ A copy of the AmeriShare sold quote.

6. ☐ A binder check for a minimum of 90% of the maximum monthly cost made payable to American Trust Administrators.

7. ☐ If Universal Applications are used for Underwriting, a Short Form application also needs to be completed due to required HIPAA Pre-existing Notification and the effect of waiving coverage.