

# Checklist for New Sales Submission (SG 11-50) 2017

## Required Core Items Needed:

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- 2017 Complete ER Application (F10538 R01)
- 2017 Complete EE Application (F10539 R02)
- Waivers
- Quarterly Wage & Tax
- Prior insurance carrier bill copy

## Additional items that may be requested:

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- Non-Disclosure Agreement
  - Partnership: Schedule K-1 (Form 1065)
  - Sole Proprietor: Schedule C
  - Articles of Incorporation
  - Controlled Group Form (X18207R02 if applicable)
  - Situations where no wage & tax Letter from CPA or Attorney
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## Best Practice Recommendation

- Full, complete and secure email to Small Group Business Consultant
- For the first 5 items - please submit separate files when submitting business.
- Employer Application 2016 Submission with 12/1 Effective Date (F10538)
- Employer Application 2017 Submission with 1/1 Effective Date (F10538 R01)
- Employee Application 2016 Submission with 12/1 Effective Date (F10539 R01)
- Employee Application 2017 Submission with 1/1 Effective Date (F10539 R02)