



**US Health and Life requires the submission of the following documents in order to obtain an underwritten rate. Please use the below checklists to help expedite the processing of your prescreen or sold group.**

### **Prescreen Checklist Requirements**

- Employee Medical Forms** – Please make sure the dates of hire, dates of birth, social security numbers and all dated signatures including dependents are on each form.
- Employee Waiver Forms** – All full-time employees waiving medical coverage are required to provide a waiver form with a waiver reason.
- Current Quarterly Wage and Tax Statement or Payroll Summary Equivalent** indicating employee status Part-time, Full-time, etc.

**Submit to: [Prescreens@ushealthandlife.com](mailto:Prescreens@ushealthandlife.com)**

### **Sold Group Checklist Requirements**

- Employer Disclosure\***
- Group Setup Form\***
- ACH Processing Form (optional)**
- Writing Agent Transmittal Form**
- Employee Medical Forms** – Please make sure the dates of hire, dates of birth, social security numbers and all dated signatures including dependents are on each form.\*
- Employee Waiver Forms** – All full-time employees waiving medical coverage are required to provide a waiver form with a waiver reason.\*
- Copy of the most recent prior carrier billing statement**
- Current Quarterly Wage and Tax Statement** indicating employee status Part-time, Full-time, Terminated, etc. \*
- A copy of the quote sold to the group**
- First Month's Premium Check** – Made payable to US Health & Life Insurance Company

**Submit to: [Underwriting\\_Support@ushealthandlife.com](mailto:Underwriting_Support@ushealthandlife.com)**

\*Sold Group Checklist Requirements must be received before a group is considered sold and reviewed by underwriting.