



SafeGuard requires the submission of the following documents in order to obtain rate for groups 10+. Please use the below checklists to help expedite the processing of your prescreen or sold group.

CURV Checklist Requirements

- Census with employees and dependents required** – Please make sure to include the first and last names, dates of birth, gender, zip codes of individual’s residence, designation as employee or dependent
- Current and Renewal Rates**
- Medical Benefit description** – benefit summary or schedule of benefits

Submit to: Prescreens@ushealthandlife.com

Sold Group Checklist Requirements

- Employer Disclosure***
- Group Setup Form***
- ACH Processing Form (optional)**
- Writing Agent Transmittal 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 by Check or Wire Transfer** – Checks made payable to US Health & Life Insurance Company

Submit to: Underwriting_Support@ushealthandlife.com

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