

## **Agent Document Submission Accuracy Check List** **Apex/HMA Solution - New Accounts**

This Document Check List is provided to assure agents and/or employer(s) have correctly filled out and reviewed all required information before presenting them into Apex Management Group.

Missing information can and will delay the establishment and start date for a new account, which can be disruptive to a new client relationship. We recommend a final **joint review of forms between the Agent and the Employer** before sending them in for account set-up and processing.

Please examine all documentation thoroughly for missing and incorrect information before sending them into Apex Management Group.

### **Employer Documents**

- Employer Enrollment File** – Please make sure that this **Excel FILE Format** is complete before submitting. Common errors are missing Social Security Numbers, Dates-of-Birth, and Employment Dates. Please note that the column titled “Tier Selection” provides a dropdown box to choose from (i.e. Employee Only, Employee + Child(ren), Employee + Spouse, Employee + Family)
- Employer Adoption Agreement** – Please make sure this form is complete. Common errors are missing Tax ID Numbers, and incomplete banking information.
- Enrollment / Change of Status Form** - Please make sure this form is complete. Common errors and missing Social Security numbers for children, missing signature of the employee, Dates-of-Birth for children.
- \$250 Accuracy Bonus** – Effective February 1, 2019, if all client documentation is received the first time in a complete and accurate fashion, we will send a one-time \$250 accuracy bonus to the agent of record. Make sure it is right the first time. Any corrections required or request for missing information will negate this bonus. Thank you for effectively managing the start of a new client relationship.

If you have any questions please contact:

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