

DocuSign® PRE-ENROLLMENT REQUIREMENTS & TIMELINES

PRE-ENROLLMENT

1. Signed Proposal is sent to newbusiness-Keysolution@keybenefit.com.
 - a. Included with attachment is the following information:
 - i. Proposal number
 - ii. Group name
 - iii. Client name
 - iv. Client email
 - v. GA name, Carrier name, KBA rep
 - vi. Agent name and eMail
 - vii. State

DOCUSIGN PROCESS

2. Within 24 hours, an email invitation, to complete paperwork via DocuSign®, is sent to Agent, Employer and GA.
 - a. Required documents for KeySolution™ Plans – delivered via DocuSign®
 - i. KeySolution™ Employer Application
 - ii. Administrative Service Agreement
 - iii. New York Surcharge Documentation
 - iv. Signed KeySolution™ Rate Sheet from the Sold Proposal
 - v. KBA Agent of Record Commission Agreement
 - vi. Most Recent Quarterly Wage Detail
 - vii. Caremark Prescription Benefit Services Agreement (*if applicable*)
 - b. Required documents for Limited Medical Plans
 - i. Limited Medical Employer Application
 - ii. Critical Illness Employer Application
 - iii. Agent Commission Form

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3. Click to Review & Sign Documents.
4. Follow Implementation Fee Link and please enter the following information
 - a. Tax ID
 - b. eMail.
5. Client chooses to pay the administration fee with either Check or Credit Card.
6. Welcome eMail(s) is generated to the Client, Agent, GA and KBA representative requesting:
 - a. Missing Data
 - b. Information for enrollment guide
 - i. Rates
 - ii. Logo
 - iii. Group Name
7. Enrollment Guides and Enrollment Platform are created.