



New Group Enrolment Checklist

In order to process the enrolment application for a new group, please ensure that the enrolment package includes the following:

- 1 Signed and completed Group Application Form. Signature is required on pages two and four. Any changes should be initialled by the client.
- 2 A list of disabled employees with date of disability, diagnosis, prognosis, and expected return to work date must be provided on the second page of the Group Application Form. If the current insurer has not waived the premium, we will need a copy of notice of claim that was submitted to the insurer or a copy of the application to the current insurer for the waiver of premium.
- 3 Signed and completed A.S.G. Application Form. Any changes should be initialled by the client.
- 4 Signed and completed ASO Agreement (if applicable). Any changes should be initialled by the client.
- 5 Automatic Cheque Plan application with a void cheque (if applicable). This is mandatory for groups with a monthly premium below \$500.
- 6 Completed and signed enrolment forms. The form must be completed in ink and signed by the employee and witness, and dated in order to ensure that the designation of beneficiary is valid. If any information is missing, this may delay the enrolment process.
- 7 Current dated cheque for the first month of premium plus PST. It should be made payable to MDM Group Insurance Plan.
- 8 Groups applying for ASO coverage will be required to submit a current dated retainer deposit cheque along with the cheque for the first month of premium. The retainer deposit cheque should be made payable to MDM Claims Payment Service. The amount of the cheque will be determined by MDM, and is disclosed in the ASO Agreement.
- 9 Copy of the benefit booklet with the current carrier (if applicable).
- 10 Group Health Evidence forms for late applicants, or employees in excess of the Non-Evidence Maximums.
- 11 Copy of current invoice for groups with current coverage with another carrier.
- 12 Refer to the letter sent by the underwriter with the application package for any other information that may be required.

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