



Broker New Small Group Checklist

- Completed New Small Group Application
- Most recent NYS-45-ATT, with employees listed.
- Broker of Record letter from the employer group, signed & dated, on letterhead.
- Signed Rate Agreement
- Completed Delta Dental Pediatric Dental Attestation
- Completed Employee Enrollment Applications or excel file
 - If the new account is going to be on the 834 file, please advise

Please note, all the above paperwork must be submitted at the time of new group submission!

***New group paperwork is due complete by the 15th of the month prior to the effective date or the group will not be accepted.**

If offering a Passport PPO national product, enrollment applications are required at the time of new group paperwork submission to validate the 25% participation requirement.

If only 1 subscriber is enrolling for an account, enrollment applications are required at the time of the new group paperwork submission to validate the common law enrollment requirement.

Thank you for your continued partnership!