



Medical New-Business Enrollment Checklist

- CBIA Membership Dues (must be paid separately from the insurance payment at cbia.com/join)
- CBIA Employer Participation Agreement (all pages required)
- UC5A - most recent employee quarterly earnings report. Indicate each employee who is enrolling, waiving, part-time, or terminated.
- Ownership Statement (if applicable, for owners not appearing on UC-5A)
- NY Forms (4403,4264,4399)
- COBRA Service Agreement (if applicable)
- HLI Proposal (signed and uploaded)
- Enrollment options: online, paper, census/excel upload file.
- Individual Medical Questionnaire (IMQ): if applicable, for any employees / dependents who were not previously underwritten.
- Service Provider Agreements – via DocuSign (will be sent separately for signature)