



# General Agent/Agent

## SMALL GROUP EMPLOYEE/EMPLOYER APPLICATION ADDENDUM GUIDELINES

It is important to note that this form is intended ONLY for those instances when the applicant inadvertently leaves information off the employee/employer application. Anthem Blue Cross will monitor this to ensure that the addendum is used appropriately and only for this purpose. It should not be used in any case as a method of completing applications for Small Group enrollment. Inappropriate use could result in not being allowed to use this form for obtaining information from your clients.

When a group is received in underwriting, the Underwriter reviews it for completion. If there is missing information, the requirement letter is completed by the underwriter and e-mailed or faxed to the G.A. / Agent, along with a copy of the Addendum. The Agent will then contact the group for the missing information by phone, using the Addendum, and fax the completed information back to underwriting.

### ➡ What can be accepted on the Addendum:

Most sections where information is mistakenly left off of the Employee Application, and some sections of the Employer Application may be completed on the addendum, including medical information\*.

#### Employee Application:

Section 1, 3, 5\*, 5A\* & 6: Any omitted information

Section 2: Any omitted information with the exception of the life beneficiary.

Section 4: Any omitted information with the exception of the signature/date.

#### Employer Application:

Section 1, 6, 9, 11, & 12: Any omitted information

**The phone addendum may only be utilized and completed by the person who actually makes the contact with the Employer or Employee for the following information:**

- **Employer Application: Section 11**
- **Employee Application: Section 1D, Section 4, Section 5\* and Section 5A\***
- **All other information itemized under this section may be obtained from the Agent by the General Agent (if applicable), and must include whom the Agent spoke with to obtain the information.**

### ➡ What cannot be accepted on the Addendum:

#### Employee Application:

Section 2: Life Beneficiary

Section 4 & 7: Signature/date (if applicable)

#### Employer Application:

Section 2, 2A, 3, 3A, 4: Benefit Selections

Section 5: Supplemental Life Benefit Selection

Section 7: Employee Eligibility

Section 8: Effective Date

Section 10: Leave of Absence

Section 13: Owner/officer signature/date

Section 14: Broker information

\*The top section must be completed in full, and one addendum can be used for corrections/changes to the Employer Application and multiple Employee Applications, if necessary. The only exception to this is if the omitted information is pertaining to an employee or dependent's health history. If we request additional health information, a separate addendum will be required for each employee and the information MUST be obtained from the employee or enrolling spouse.