

Documentation Required with Group Health Insurance Application

All businesses must provide a copy of the most recent Quarterly Wage and Tax Statement (UITR) if they have 2 or more eligible employees applying for health coverage. If a Wage and Tax statement is not required, the following documentation must be provided (**note**: An insurance company may request additional information as deemed appropriate for each business.)

C Corporation: Form 1120, Form 941, Schedule E, Payroll Ledger and Articles of Incorporation/Organization if in business less than 3 months, Bylaws if less than 6 employees

S Corporation: Form 1120S, Schedule K1, Form 941 if there are employees other than shareholders, Payroll Ledger and Articles of Incorporation/Organization if in business less than 3 months, Bylaws if less than 6 employees

Partnership: Form 1065, K-1's, Schedule SE (if required to file), Payroll Ledger if in business less than 3 months, Partnership Agreement

Sole Proprietorship: Form 1040, Schedule C, Schedule SE (if required to file), Payroll Ledger and Business License if in business less than 3 months

LLC: See C Corporation and Partnership

Acquisitions: Letter on company letterhead explaining situation, Legal Transfer/Acquisition Documents, UITR from the acquired company, Payroll Ledger

Non-Profit Organization: 941, W2's, 990 if gross receipts are over \$25,000, Payroll Ledger

Husband and Wife Groups: See C Corporation, S Corporation, Partnership, or Sole Proprietorship. Also, must have legal documentation that both parties are receiving financial compensation from the employer.

Farm: 1040, Schedule F or 4835. If husband and wife, provide one (Sch F/4835) for each. If only one spouse is listed on Schedule F, payroll is required for the other spouse.

Ranch: 1040, 943, and Schedule F

Leased Employees/PEO's: UITR or Service Bill and Employer Waiver from PEO health plan or copy of Leasing Agreement