



New Group Checklist

(For Agent Use Only)

Thank you for choosing Dentist Direct! The following items are required for submitting a new group:

Group Application

- Remember to specify the new hire waiting period
 - Standard new hire waiting periods are **1st of the month following** (insert days, months, etc.)
- Make sure to include EMAIL ADDRESS for billing contact
- Make sure to enter employer contribution (if any). See quote to determine if group was quoted contributory or voluntary.

Copy of Sold Quote

- Signed by the group or writing agent (signature line at bottom of quote)
- Remember to include the sold vision quote if vision is included

Census

- Not required if submitted with the quote request and no material changes have occurred since

Binder Check or ACH Authorization Form (auto-pay)

- Cards will not be mailed until initial payment is received
- Monthly billing fee is waived for all groups electing auto-pay

Proof of Prior Coverage

- Most recent invoice from prior plan
- Summary of Benefits from prior plan (unless submitted with quote request)

Enrollment Information

- Via enrollment forms or Dentist Direct enrollment spreadsheet (electronic)
- **Setup will not be initiated until enough enrollments have been submitted to meet participation requirements.** See quote for participation requirement.

For questions please contact:

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