

# All Savers® Alternate Funding Case Submission Checklist for Migration of UnitedHealthcare Groups to All Savers Migration Quote.

PDF versions of the documents below can be uploaded to [myallsavers.com](https://myallsavers.com).

The following items are required for final quoting. All items are essential for successful and timely turnaround on your final rates request. Incomplete items may cause delays.

## Submission Checklist for Final Quote.

- Employer Completed Application** (additional required information after street/preliminary quote is completed).
  - Employer Application:**

**Upload Note:** When uploading documents to the [myallsavers.com](https://myallsavers.com) website for installation, check the box for wage and tax, initial check and current carrier bill even though you are not uploading those documents (they are not necessary for migrations but are required by the system to proceed).

    - PDF versions of the employer application should be uploaded to the group record in [myallsavers.com](https://myallsavers.com).
    - All questions answered completely.
    - Signed and dated by both employer and broker on all indicated pages.
    - Payment Authorization Form (needed regardless of type of payment).
  - Demographic Spreadsheet or Employee Applications** (for employees electing health coverage) — Excel template or PDF versions of the applications should be uploaded to the group record in [myallsavers.com](https://myallsavers.com). The following information is needed for all electing employees and their dependents to provide an underwritten quote:
    - Name (first and last).
    - Gender.
    - Date of birth.
    - Home ZIP Code.
    - Indication of dependents (spouse, children).
    - Social Security numbers.
    - Home address of employee.
    - Email address of employee.
    - Date of Hire.

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**Excess Loss Insurance Application:**

- Filled out completely.
- Signed and dated by both the agent and the employer.

**Billing & Collections Agreement:**

- PEPM Value entered.
- Signed and dated by employer and broker.

**Note:** Employer signs twice (once on page 3 and once on page 4).

**New York Surcharge Forms:**

- If the paperwork is received after the first of the month, the election will not be effective until the following month.

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