

CONEXIS Group Submittal Checklist
COBRA OR COBRA-HIPAA

*Please use this checklist to ensure that all forms and information needed to process your group application are included in the submission packet to **Claremont Insurance Services**.*

New Business Application for COBRA & COBRA HIPAA Services. Includes:

- 2006 Conexis Administrative Services Agreement**

Page 4 requires client signature.

- Performance Standards Exhibit**
 HIPAA Confidentiality Exhibit

- Service Agreement Appendix with Fee Schedule**

Have client sign this and initial next to all services for which they are contracting

Employer Kit. Includes:

- Client Profile**
 COBRA & HIPAA Attachment

Separate form required for each employer sponsored health group plan subject to COBRA.

- Carrier & Plan Information Form**

Complete for each employer-sponsored health plan subject to COBRA. Separate form required for each plan with unique rates and/or group #.

- Division Contact Info** *(For employers with additional divisions reporting COBRA activity.)*

- SIT Form** (Sales Implementation Transmittal) appropriate to Client paying Conexis fees.
To be completed by the broker.

If the broker is paying the Conexis fees, please substitute these forms:

- Service Agreement Appendix with Fee Schedule – SMG – Broker Pays Fees**

Page 5 requires client and broker signature.

- SIT Form** (Sales Implementation Transmittal) appropriate to Broker paying Conexis fees

Broker Appointment Paperwork: None required.

COBRA & COBRA HIPAA group submittal materials are due to Claremont 16 days prior to requested effective date.

Mail all documents to:

**Claremont Insurance Services
2999 Oak Road Suite 810
Walnut Creek, CA 94597**

For further assistance, including open enrollment meetings, please call (800) 696-4543.