

Employer Program Worksheet

Company Name: _____

Address (Street, City, State, Zip): _____ Phone: _____

Contact (Name & Title): _____ EMail: _____

Company Description

(e.g. Engineering Co. w/ High Participation in Vol. Benefits,
Manufacturing Co. w/Executive Benefits Plan/Carve Out)

Employee Location(s) Agent: "FTE" Totals Below Should Reflect Only Full Time Employees Who Meet The Definition of "Actively At Work Employees" As Defined on Employer Program Application (See General Information For Description). **Important:** The Employer Program is Subject To Pre-Approval By The Insurer, Including Receipt of The Employer Census At Least 10 Business Days Prior To The Open Enrollment Start Date.

<input type="radio"/> Single State:	State	FTE#	<input type="radio"/> Multiple States:	State	FTE#	State	FTE#	State	FTE#	Total FTE's

Employee Demographics Information provided in census will be used to confirm employee demographics.

- At Least 50% Are Age 40+
 At Least 40% Earn \$40k+

Employer Participation (Check all that apply)

- Offering only MedAmerica LTCI Products
 Offering Group Billing and/or Payroll Deduction
 Distribution of Employee Introduction Letter
 Education Meetings During Work Hours Allowed
 Distribution of Open Enrollment Information
 LTCI Consultations During Work Hours Allowed

Premium Contribution

- 100% Voluntary
 100% Employer Funded
 Combination Voluntary/Employer Funded

Additional Information

LTCI Offered in Last 3 Years? _____ Other Products Sold To This Employer _____

Other Carrier Name _____ Projected Open Enrollment Date _____

Year of Initial and Last Enrollment _____ Projection Participation % _____

Total Number of EE's Insured _____ Projected Premium \$ _____

Agent Remarks _____

Agent Name & Writing Number _____ Phone _____

Address _____ Email _____

States Where Agent is Appointed with MedAmerica _____

QUESTIONS? CALL 800-724-1582 (Sales) or 877-233-5435 (Medical Underwriting Hotline)

Send Completed Form to: **MedAmerica Sales Dept., 165 Court Street, Rochester, New York 14647 Fax: 585-238-3642**

RSM/SS: _____

Home Office Signature: _____

Home Office Date: _____

Employer Program General Information

Employer Program Minimum Participation: 10 Actively at Work Employee Applications That Answered 'NO' to all 4 Health Questions (*10 Minimum Does NOT Include Actively at Work Care Partners*).

New Hire Participation Eligibility: A **60 Day** New Hire Open Enrollment Period begins on the first day that a New Actively At Work Employee is Eligible to Apply. The first date that New Hires are eligible to apply is defined at the start of a new employer program, subject to approval by insurer. Census information for new hires is required.

Active at Work Definition – Simplicity (*may vary by state*): An Actively At Work Employee shall mean an employee aged 18 to 65 currently paid by the employer and not on authorized absence due to illness, injury, or on Leave Without Pay. They must be regularly scheduled to work not less than 30 hours per week and be present at their Employer's place of business or an alternate work site as designated by the Employer or at another location to which the Employer's business requires them to travel and be performing the material and substantial duties of their jobs. If the Employee works from home, they are considered Actively At Work if they are not Hospital Confined and not disabled to a degree that they could not have reported for work at the Employer's usual place of business and performed all the material and substantial duties of their occupations not less than 30 hours per week.

Active at Work Board Member – Simplicity (*may vary by state*): An Eligible Board Member who is fully appointed as a member of the board of the sponsoring Employer qualifies for underwriting consideration during initial open enrollment equal to those afforded the Actively At Work Employees by signing the Board Member Statement to attest that he/she satisfies the Active at Work Definition (*see above*). Proof of employment may be required.

Active at Work Definition – Simplicityⁱⁱ (*may vary by state*): Actively At Work Employee shall mean an employee or Care Partner of an employee, aged 18 to 71, currently paid by the above employer, employed outside the home by another employer, or self-employed outside the home, and not on Leave Without Pay or an authorized absence due to illness or injury for more than 5 consecutive days over the last 180 days. The Actively At Work must be regularly scheduled to work not less than 30 hours per week and be present at their Employer's place of business or an alternate work site as designated by the Employer and be performing the material and substantial duties of their jobs. If the employee works from home, they are considered Actively At Work if they are not hospital confined and not disabled to a degree that they could not have reported for work at the Employer's usual place of business and performed all the material and substantial duties of their occupations not less than 30 hours per week.

Active at Work Care Partner – Simplicityⁱⁱ (*may vary by state*): An Applicant who is an Actively At Work Care Partner of an Eligible of the Employer Program must sign the Actively At Work Care Partner statement on his/her application confirming that he/she meets the definition of an Actively At Work Employee (*as defined above*), AND that he/she is the Care Partner of an Eligible Member of the Employer Program. The Actively At Work Care Partner may be required to provide proof of actively at work status and authorizes his/her Employer to verify employment status for MedAmerica Insurance Company (the Company) on request. Name of Employer/Phone#. If self-employed, a copy of Form 1040, Schedule C is required, at the Company's discretion.

Active at Work Board Member – Simplicityⁱⁱ (*may vary by state*): An Eligible Board Member who is fully appointed as a member of the board of the sponsoring Employer qualifies for underwriting consideration during initial open enrollment equal to those afforded the Actively At Work Employees by signing the Board Member Statement to attest that he/she satisfies the Active at Work Definition (*see above*). Proof of employment may be required.