

Group Size Survey

Customer Name: _____

Customer Number: _____

Policy #s: _____

Thank you for completing our survey. Please **complete all three questions** and remember to **sign the document** to attest that the information provided is correct.

Employer Information Form

Legally Required Annual Group Size Request

Who to count.

- An employee is typically any person whose work is controlled and directed by the employer, including the hours worked, projects assigned and the time spent on each project. They generally receive a W-2 and may work full-time, part-time or on a seasonal basis.
- Individuals do not have to qualify for medical coverage to be considered employees. Include in your count those who may not always get W-2s, such as owners and partners, so long as there is at least one full-time common law non-partner/non-owner spouse employee as well. If the only employees are an owner and/or the partners and their spouses, you do not qualify as an employer group
- Use the number of employees at the end of the month. Count everyone, including those in different locations or divisions.
- Count all union employees together with all other employees.
- Count all employees of all affiliated companies or in a control group as one group.
- Use whole numbers only – no decimals, fractions or ranges, round down

Do not count:

- Sole proprietors, COBRA recipients; retirees; unpaid interns
- 1099 Independent Contractors, Shareholders and Board Members (Only in very limited circumstances)

How to count.

A. Calculate your 2016 average total number of employees (ATNE).	Your answer:
List the total number of employees at the end of each month in 2016. Then, add the totals together and divide by 12.	

B. Calculate your 2017 projected average total number of employees (ATNE).	Your answer:
1. For each completed month of 2017, count all employees.	
2. For each remaining month of 2017, count the number of projected employees.	
3. Add the monthly totals from lines (1) and (2) and divide by 12.	

C. Calculate your 2017 projected average number of eligible employees.	Your answer:
<i>(Note: Eligible employees are those who are eligible to enroll in any medical plan you offer, even if they aren't eligible to enroll in a UnitedHealthcare plan. Here you may include COBRA and retirees.)</i>	
1. For each completed month of 2017, count the total number of eligible employees.	
2. For each remaining month of 2017, count the projected total number of eligible employees.	
3. Add the monthly totals from lines (1) and (2) and divide by 12.	

I am a duly authorized representative and confirm in writing that the above information is true, correct and complete to the best of my knowledge or belief.

Name: _____

Title: _____

Signature: _____ Date: _____