

**Help avoid processing delays by fully completing and submitting the most current forms.**

Our forms are updated periodically to comply with the most recent legal and regulatory requirements. This matrix is segmented into sections; New Business, Existing Groups and Recertification, so you can easily reference what you need.

To ensure you're using a valid form, please reference the 8-digit order tracking number (OTN) located on the lower left-hand corner of the last page of each form and reference against the OTNs below and the expiration date. **Forms not listed on this matrix are outdated and won't be accepted for processing.** Remember, you can always find the current forms at [kp.org/smallbusinessbrokerforms/ca](http://kp.org/smallbusinessbrokerforms/ca).\*

\* Forms followed by this † indicator aren't accessible on [account.kp.org](http://account.kp.org). For forms that aren't available online, please contact our Small Business Services Customer Connection Team at **800-790-4661, option 3** for consultation.

## NEW BUSINESS

Form name Click form name to download the most current version	Version	Order tracking number (OTN)	Expiration date
Census, Broker	January 2020	373250464	
Census, Broker	January 2018	60645108	12.31.19
Census, Employer† (Direct)	January 2017	60515208	
Declination of Coverage, English	January 2020	362735382	
Declination of Coverage, English	January 2019	61134709	12.31.19
Declination of Coverage, Chinese	January 2020	375057219	
Declination of Coverage, Chinese	January 2019	61187109	12.31.19
Declination of Coverage, Spanish	January 2020	375056445	
Declination of Coverage, Spanish	January 2019	61186910	12.31.19
Electronic Transfer for Payment	January 2020	365799621	

## NEW BUSINESS cont.

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
Employee Enrollment, English	January 2020	362713619	
Employee Enrollment, English	July 2019	345232931	12.31.19
Employee Enrollment, Chinese	January 2020	375064459	
Employee Enrollment, Chinese	July 2019_v2	61187209	12.31.19
Employee Enrollment, Spanish	January 2020	375062300	
Employee Enrollment, Spanish	July 2019_v2	61187110	12.31.19
Employer Attestation Declination of Coverage	January 2020	362747443	
Employer Attestation Declination of Coverage	January 2019	61134908	12.31.19
New Employee Eligibility	January 2020	362741655	
New Employee Eligibility	January 2019	61134810	12.31.19
2020 New Group Application	January 2020	346554401	
2019 New Group Application	January 2019	61153408	12.31.19
Owner/Officer Eligibility Statement	January 2020	365803302	
Owner/Officer Eligibility Statement	January 2019	61135308	12.31.19

## EXISTING GROUP

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
Change of Ownership†	January 2020	373257811	
Change of Ownership†	January 2019	61134308	12.31.19
Change of Ownership Subscriber Transfer†	January 2020	373257811	
Change of Ownership Subscriber Transfer†	January 2019	61134408	12.31.19

**EXISTING GROUP cont.**

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
Change of Ownership / Change of Ownership Subscriber Transfer Combination†	January 2020	373257811	
Change of Ownership / Change of Ownership Subscriber Transfer Combination†	January 2019	61134308 and 61134408	12.31.19
Contact Change Request	January 2020	381232732	
Contact Change Request	January 2019	61134508	12.31.19
Customer Address or Name Change Request	January 2020	381257973	
Customer Address or Name Change Request	January 2019	61134708	12.31.19
Electronic Transfer for Payment	January 2020	365799621	
Employee Dependent Change, English	January 2020	368443377	
Employee Dependent Change, English	July 2019	345227196	12.31.19
Employee Dependent Change, Chinese	January 2020		
Employee Dependent Change, Chinese	July 2019_v2	61187110	12.31.19
Employee Dependent Change, Spanish	January 2020		
Employee Dependent Change, Spanish	July 2019_v2	61187308	12.31.19
Employee Enrollment, English	January 2020	362713619	
Employee Enrollment, English	July 2019	345232931	12.31.19
Employee Enrollment, Chinese	January 2020		
Employee Enrollment, Chinese	July 2019_v2	61187209	12.31.19
Employee Enrollment, Spanish	January 2020		
Employee Enrollment, Spanish	July 2019_2	61187110	12.31.19
Grandfathered (Nonmetal) Health Plan(s) Status†	January 2020	380765396	
Grandfathered (Nonmetal) Health Plan(s) Status†	January 2019	61134809	12.31.19
Group Termination Request†	January 2020	380771714	
Group Termination Request†	January 2019	61134909	12.31.19

## EXISTING GROUP cont.

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
2020 New Group Application	January 2020	346554401	
2019 New Group Application	January 2019	61153408	12.31.20
2018 New Group Application	January 2018	60596315	12.31.19
Primary Administrator Online Access	January 2020	365805145	
Online Account Services User ID Request	July 2019	357088953	12.31.19
2020 Plan Add/Change Request	January 2020	380711134	
2019 Plan Add/Change Request	January 2019	61135608	12.31.20
2018 Plan Add/Change Request	January 2018	60757108	12.31.19
Renewal Date Change Request†	January 2020	380770298	
Renewal Date Change Request†	January 2019	61135409	12.31.19
Special Open Enrollment Request†	January 2020	381238398	
Special Open Enrollment Request†	January 2019	61135808	12.31.19
Subscriber Termination and Transfer	January 2020	381238398	
Subscriber Termination and Transfer	July 2019	345235546	12.31.19

## RECERTIFICATION

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
Contact Change Request	January 2020	381232732	
Contact Change Request	January 2019	61134508	12.31.19
Customer Address or Name Change Request	January 2020	381257973	
Customer Address or Name Change Request	January 2019	61134708	12.31.19

## RECERTIFICATION cont.

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
Declination of Coverage, English	January 2020	362735382	
Declination of Coverage, English	January 2019	61134709	12.31.19
Declination of Coverage, Chinese	January 2020		
Declination of Coverage, Chinese	January 2019	61187109	12.31.19
Declination of Coverage, Spanish	January 2020		
Declination of Coverage, Spanish	January 2019	61186910	12.31.19
Employee/Dependent Change, English	January 2020	368443377	
Employee/Dependent Change, English	July 2019	345227196	12.31.19
Employee/Dependent Change, Chinese	January 2020		
Employee/Dependent Change, Chinese	July 2019_v2	61187110	12.31.19
Employee/Dependent Change, Spanish	January 2020		
Employee/Dependent Change, Spanish	July 2019_v2	61187308	12.31.19
Employee Enrollment, English	January 2020	362713619	
Employee Enrollment, English	July 2019	345232931	12.31.19
Employee Enrollment, Chinese	January 2020		
Employee Enrollment, Chinese	July 2019_v2	61187209	12.31.19
Employee Enrollment, Spanish	January 2020		
Employee Enrollment, Spanish	July 2019_v2	61187110	12.31.19
Employer Attestation Declination of Coverage	January 2020	362747443	
Employer Attestation Declination of Coverage	January 2019	61134908	12.31.19
Employer's Confirmation of Workers' Compensation	January 2020	380767749	
Employer's Confirmation of Workers' Compensation	January 2019	61134511	12.31.19
New Employee Eligibility	January 2020	362741655	
New Employee Eligibility	January 2019	61134810	12.31.19

**RECERTIFICATION cont.**

<b>Form name</b> Click form name to download the most current version	<b>Version</b>	<b>Order tracking number (OTN)</b>	<b>Expiration date</b>
2020 New Group Application	January 2020	346554401	
2019 New Group Application	January 2019	61153408	12.31.20
2018 New Group Application	January 2018	60596315	12.31.19
Owner/Officer Eligibility Statement	January 2020	365803302	
Owner/Officer Eligibility Statement	January 2019	61135308	12.31.19
Participation and Contribution Attestation	January 2020	380762202	
Participation and Contribution Attestation	January 2019	61135408	12.31.19
2020 Plan Add/Change Request	January 2020	380711134	
2019 Plan Add/Change Request	January 2019	61135608	12.31.20
2018 Plan Add/Change Request	January 2018	60757108	12.31.19