UnitedHealthcare of Texas, Inc.

UnitedHealthcare Benefits of Texas, Inc.

(previously Pacificare Life & Health Insurance Co.)

2 – 50 Required Tax Documentation

ALL GROUPS:

- **Employer's latest Texas Workforce Commission quarterly wage & tax report.**
- **If in business less than one year, submit company formation documents. This may be: An Assumed Name Certificate (Sole Proprietors), Certificate of Formation (Corporations, LLCs, LLPs, etc.), Articles of Incorporation, LLC Agreement, or Partnership Agreement.**
- **If owner(s) applying for coverage and not appearing on the wage & tax report, submit previous tax filing year's documentation: 1040 Schedule C (Sole Proprietors), K-1 (S Corps), 1120 (some C Corps).**
- **For groups of 2 - 5 eligible employees, a wage/tax is always required. *A payroll is only acceptable in this group size if a payroll company (ADP, Paychex, etc.) prepares the payroll.***
- **For groups of 6+ that have not been in business long enough to have filed a TWC report, a company payroll report is acceptable. ****
- **Husband & Wife groups: If both are owners on the company formation documents, then refer to above for ownership docs and tax documentation required. If only one is an owner, the other must be compensated as a W2 employee. If no TWC report is filed (not required by Texas), then submit a company payroll report for consideration. ****
- **For groups with eligible 1099 individuals, submit a completed 1099 Independent Contractor form.**

UNACCEPTABLE DOCUMENTATION:

- **Stock Certificates**
- **Corporate Minutes**
- **Letters from Attorney/CPA**
- **W4s, W2s, W3s, W9s, paystubs or canceled payroll checks**

****ACCEPTABLE COMPANY PAYROLL REPORT DOCUMENTATION** (IN CERTAIN CIRCUMSTANCES WHEN NO TWC IS AVAILABLE):

- **List the company name and Tax ID number**
- **Be current and include current pay period dates**
- **List all employees on the same document NOTE: Separate sheets or pay stubs for each employee is not acceptable.**
- **Detail wages, and withholdings**
- **Include company totals - a total balance of wages and withholdings**

THIS LIST IS NOT ALL-INCLUSIVE. UNITEDHEALTHCARE RESERVES THE RIGHT TO REQUEST ADDITIONAL DOCUMENTATION AS NEEDED TO PROVE ELIGIBILITY.

The Insurance Exchange

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