



Wage and tax documentation requirements for Oxford small group business

We are aligning the new business and renewal review process for Oxford small groups to ensure compliance with Full-time Equivalent Total Number of Employees (FTE) preceding calendar year requirements. Beginning with groups that have an **April 1, 2022** policy effective date, please follow these guidelines to help ensure timely processing of applications and renewals¹:

- For employers **enrolling up to 2 subscribers**: Submit the group's payroll/wage and tax information for the 4 quarters of the prior calendar year, as well as the group's most recent quarterly payroll/wage and tax records.
- For employers **enrolling more than 2 subscribers**: Submit the group's most recent payroll/wage and tax records.

These guidelines apply to **new and renewing business** applications for Oxford fully insured small group coverage (New York: 1-100, New Jersey: 2-50², Connecticut: 1-50). The additional full prior calendar year's payroll/wage and tax records are meant to verify the group's eligibility for small group coverage.

What this means to you

When uploading supporting documentation with your client's application in the small group Sales Automation Management tool, **SAMx**, please be sure to upload the appropriate payroll/wage and tax information as outlined above. Without this information, applications will be incomplete and remain in a pending status.

Additional communications

- Our Risk Management team will contact any renewing client and the client's broker as part of the standard audit process should additional information be needed prior to renewal.

The instructions sheets for submitting wage and tax documentation with new and renewing Oxford fully insured small group applications have been updated according to the new guidelines.

- [**Connecticut Oxford small group wage & tax document submissions – instructions sheet**](#)
- [**New Jersey Oxford small group wage & tax document submissions – instructions sheet**](#)
- [**New York Oxford small group wage & tax document submissions – instructions sheet**](#)

The instructions sheets are included with small group renewal packages and you may also find them on uhceservices.com in the Producer Resources and Group Administration sections.

- **Questions?**
- Please contact your Oxford sales representative or call our Client Services team during normal business hours at 1-888-201-4216.
- We appreciate your support of these guidelines and your continued business

¹For New Jersey renewing business, we are not using collected information for counting until the State of Emergency is lifted.

²For New Jersey business, the wage and tax requirement is waived for groups with 5 or more enrolled.

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