

# 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

### Who to count:

- Count all employees. An employee is any person whose work is directed by the employer. Employees receive a W-2 and may work full time, part time, or seasonally. A worker does not have to qualify for medical coverage to be considered an employee.
- Count owners and partners, as long as there is at least one full time common law non-partner/non-owner spouse employee as well.
- Count using the number of employees at the end of the month. Include everyone, such as those in different locations or divisions.
- Count all union employees together with all other employees.
- Count, in one group, all employees of affiliated companies and those control groups.
- Count with whole numbers only. Don't use decimals, fractions, or ranges. Round down.

### Do not count:

- Sole owner individuals and spouses when only one or both own the business.
- Partners in a partnership.
- 2% shareholders in S-Corporation.
- Independent contractors (those paid via a Form 1099).
- Leased employees.
- Retirees, unpaid interns, and COBRA recipients.

### How to count:

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**A. Calculate your 2020 average total number of employees (ATNE).**

Your answer:

1. List the total number of employees at the end of each month in 2020.
2. Add the monthly totals from line (1) and divide by 12.

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**B. Calculate your 2021 projected full time equivalent employees (FTE).**

Your answer:

(Note: A **full-time** employee is one who works an average of 30 or more hours per week. A **part-time** employee is one who works less than 30 hours per week. A **seasonal worker** is one who performs labor or services on a seasonal basis as defined by the Secretary of Labor, including retail workers employed only during the holiday season. **Exclude** seasonal workers who worked 120 days or fewer if that is the **only reason** your group exceeds 100 full-time employees).

1. For each completed month of 2021, count all full-time employees
2. For each completed month of 2021, count all HOURS worked by part-time employees and divide by 120.
3. For each remaining month of 2021, estimate all full-time employees.
4. For each remaining month of 2021, estimate all HOURS projected to be worked by part-time employees and divide by 120.
5. Add all resulting figures from lines (1) through (4) together and divide by 12.

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**C. Calculate your 2021 projected average number of eligible employees.**

Your answer:

(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 add COBRA and retirees.)

1. For each completed month of 2021, count the total number of eligible employees.
2. For each remaining month of 2021, count the projected total number of eligible employees.
3. Add the resulting figures from lines (1) and (2) and divide by 12.

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**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: \_\_\_\_\_