

Checklist for New Groups

2026

When establishing a new group, there are several essential documents necessary for an efficient implementation. To better serve our clients, DDOK has developed a checklist for Select group setup and initial enrollment process.

☐ Application for Group Contract

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| <input type="checkbox"/> Step 1: Plan Effective Date | <input type="checkbox"/> Step 6: Plan Options and Plan Selection |
| <input type="checkbox"/> Step 2: Employer Information | <input type="checkbox"/> Step 7: Third Party Administrators
(Authorized contact signature required) |
| <input type="checkbox"/> Step 3: Eligibility and Enrollment | <input type="checkbox"/> Step 8: Payment Options
(Authorized bank signature required) |
| <input type="checkbox"/> Step 4: Employer Contribution | <input type="checkbox"/> Step 9: Producer/Agent Information |
| <input type="checkbox"/> Step 5: Contact Information and Online Resources Access | <input type="checkbox"/> Step 10: Acknowledgement and Signatures |

***Please note:** Incomplete and/or inaccurate applications will result in processing delays. Please ensure the application is completed in its entirety and signed by the person authorized to contract for the group and, if applicable, producer.*

☐ Initial Enrollment (select one):

- ☐ **Enrollment Forms** – PDF Forms completed and signed by each employee
- ☐ **One-time Load** – Use the specifications on the 'Instructions' tab of the formatted Excel spreadsheet to capture all member elections.
- ☐ **EDI File** – Weekly 834 Electronic Data Interchange (EDI) file with all active enrollments, changes and/or terminations (minimum of 75 subscribers required to use this method). A member of our Electronic Services team will contact you to begin file implementation and testing once account structure is established.

Send completed application, enrollment documents and other supporting materials to Sales@DeltaDentalOK.org or mail to:

Delta Dental of Oklahoma
Attention: Sales
P.O. Box 54709
Oklahoma City, Oklahoma 73154-1709