

Complete these required forms and employee list when requesting approval for a Section 125 worksite case.

**E-mail scanned required forms to [LNWorksite@Globe.Life](mailto:LNWorksite@Globe.Life).** To qualify as a Section 125 case, the requirements for Eligible Employees and Qualified Employers must be met. Refer to the **Worksite Advantage Agent Guide (R-3631)** for these administrative guidelines.

For ALL Worksite cases, you must have a minimum of **five (5) eligible employees** with **one (1) or more policies** being billed to the employee(s). Businesses with less than five (5) eligible employees must be written as individual.

**Payroll Deduction Billing Information Sheet (R-3240)**

- Agent’s printed name and signature required
- Agency Owner signature required
- Keep original for Employer Implementation Manual
- Give a copy to the Payroll Administrator

**Application for Group Term Life (GE-APP)**

*Complete even if not initially offering Group Term.*

- Employer signature required
- Keep original for Employer Implementation Manual
- Give a copy to the Payroll Administrator
- Not required in CA, IN, and KS

**Advantages of Online Billing**

- Pay directly from your company’s bank account using a secure, encrypted web service
- Add or remove employees instantly
- Paperless invoicing
- Manage invoices for multiple companies at once
- Update company information online
- Assign roles to other employees; restrict employees to do specific tasks, or have another employee handle everything

**Full Employee List**

*Typed employee list with hire dates must be signed by the employer/bookkeeper. List only those employees who work 28 or more hours per week.*

- Keep original for Employer Implementation Manual
- Give a copy to the Payroll Administrator

**Section 125 Plan Adoption Agreement (EIM-001, Section 5 Tab, page 1)**


- Employer signature required
- Keep original for Employer Implementation Manual
- Give a copy to the Payroll Administrator

**Payroll Deduction Agreement (R-337)**

- Employer signature required
- Keep original for Employer Implementation Manual
- Give a copy to the Payroll Administrator

**Employee Engagement Form**

- Employer initials three benefits
- Agent complete enrollment date, time, and location
- Agent completes enrollment contact person and person who receives payroll deduction authorizations.



1234 STREET AVE, SUITE 321  
DALLAS, TX 75000  
p: 123.555.1234 f: 123.555.2345  
[www.xyzbusiness.com](http://www.xyzbusiness.com)

Below is a complete list of XYZ Business employees and their hire dates:

|                 |                   |
|-----------------|-------------------|
| Adams, Chris    | February 12, 1992 |
| Douglas, Marsha | September 2, 2000 |
| Dugan, Janelle  | March 17, 2002    |
| Evans, Dan      | August 28, 1999   |
| Frank, Jim      | January 15, 1997  |
| Gregory, Nancy  | March 22, 2000    |
| Hudson, Mary    | November 5, 2006  |
| Jackson, Sam    | October 2, 2003   |
| Jones, Mark     | July 21, 2001     |
| Lawton, Judy    | April 3, 2009     |
| Michaels, Eric  | December 11, 2004 |
| Peterson, Tom   | March 21, 2009    |
| Smith, Jay      | June 10, 2005     |
| Wilson, Wendy   | May 4, 2007       |

*Jane Smith*  
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Employer/Payroll Administrator Signature

