

# Worksite Advantage Standard Payroll Deduction (PD) Checklist

Complete these required forms and employee list when requesting approval for a Standard Payroll Deduction worksite case. **E-mail scanned required forms to [LNWorksite@Globe.Life](mailto:LNWorksite@Globe.Life).** To qualify as a Standard Payroll Deduction 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

**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

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

- Employer 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

**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

## XYZ BUSINESS

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*  
Employer/Payroll Administrator Signature

