

Quarterly Wage Report Requirements – Kaiser Washington

Kaiser Washington now requires new small group plans with five (5) or fewer employees enrolling in the health plan to provide a Quarterly Wage Report (Form 5208B). Please see attached copies of Form 5208B for reference.

Groups with 1–5 Subscribers

Kaiser is requesting the most recent quarterly wage report. If the group does not have a recent wage report, or if no wages were paid in the previous quarter, the following documentation will be accepted:

- Payroll journals (preferred: at least six (6) weeks of payroll records).
- If fewer than six (6) weeks are available, submit what is available along with an explanation of why six weeks are not available (e.g., new business, recently started payroll, etc.).
- If no payroll journals are available, submit W-4 forms (typically for start-up or brand-new payroll situations).

Owner Documentation (If Owners Are Enrolled)

If owners are included in the group's enrollment, the following federal tax documents are acceptable (these are federal-level documents and not state-specific):

- K-1 forms for owners of Corporations, LLCs, etc.
- Schedule C for sole proprietors.
- Schedule F for farms.
- Schedule E for real estate income.
- Owners may also place themselves on payroll and provide payroll documentation.
- A W-4 form is also acceptable documentation.

Newly Hired Employees

- Pay stubs, or
- A copy of the employee's W-4 form.