



Company WRAP Document Creation

Guideline, tips, and definitions for how to do create a WRAP Document within the Agency Engine

The Agency Engine is the hub and stores all the core Company, ERISA, and Plan information for your client or prospect. In this guide, you will learn the following:

- Documents and information needed to get started
- Step by step guide and required fields
- Quick steps to do WRAP Docs in minutes for all of your clients
- Common Definitions & Tips

Documents and Information Needed to Get Started

Note: If Company and Plans are already updated with the Agency Engine, then you can skip this step.

- Company Address, Phone Number, Federal Tax ID, Entity Type
- Plan Documents from Carrier, like Plan Summary, Summary of Benefit and Coverage
- ERISA Plan Start Date, ERISA Plan Number
- Waiting period(s), entry and termination of coverage dates
- Group ID, Policy Numbers
- Plan Sponsor Name, Plan Administrator Name, and Agent for Service of Legal Process on the Plan

