



Regence BlueCross BlueShield of Utah is an Independent Licensee of the Blue Cross and Blue Shield Association

SMALL (2-50) INNOVA/ENGAGE/ACTIVATE/HSA2.0 **GROUP PROPOSAL CHECKLIST**

The following information is **required** for a FIRM quote for any/all groups with 2 - 50 employees.

Group Name: _____
Agent/Agency Name: _____
Agent Phone: (____) _____ Agent Fax: (____) _____
Agent Email: _____

In order to guarantee effective dates, all forms must be returned completed to Regence BCBSU 15 days prior to requested effective date.

Current applications and health questionnaires must be signed within 60 days of the group's effective date. If the forms expire, the entire group will have to re-sign and date, certifying that there have been no changes.

- Complete "Group Master Application"**
- Most recent "Employer Quarterly Wage & Tax Report"** (Required by Utah Department of Workforce Services each quarter) or **for new businesses a letter in lieu of "Employer Quarterly Wage and Tax Report"**
 - Underwriting requires this form to verify employee participation.
 - Indicate employees who are part-time or terminated. A "Utah Small Employer Health Insurance Application" and "Authorization for Use and Disclosure of Protected Health Information" will be required for **all** others.
- Group's current plan design** (i.e., Benefit Summary)
- Completed "Utah Small Employer Health Insurance Application" and "Authorization for Use and Disclosure of Protected Health Information"** for each enrolling and waiving employee
 - All enrolling employees (including those in the new-hire waiting period) must complete and sign the application and disclosure form.
 - Each enrolling employee must complete the Enrolling Dependents section for all enrolling dependents.
 - All employees waiving coverage for self and/or dependents must complete the full "Utah Small Employer Health Insurance Application."

Please DO NOT send a check until group is billed.

Fax required information to the attention of your Sales Executive (801) 333-6552
Call (801) 333-2520 or 1 (866) 634-8783 for more information.