

New Business Submission Checklist

(Deadline is the 23rd of the month prior to the requested effective date)



- ☐ Census and Proposed Rates
 - ☐ Verify that census provided with the proposal matches final enrollment. If not, update census and resubmit for revised rates prior to submitting enrollment paperwork
- ☐ Deposit Check
 - ☐ Must be at least 80% of the first month's premium
 - ☐ Must be made payable to BCBSRI
- ☐ Payroll (Certification) Documentation
 - ☐ Make sure you have a membership application or waiver for every eligible employee
 - ☐ Make sure you have payroll documentation for all employees, including owners
 - ☐ Cobra employees – write in at the bottom of payroll with their Cobra start date & include a copy of the last payroll they appear on
- ☐ Applications
 - ☐ Check to make sure application is filled out completely, including the following:
 - Effective date
 - Date of Hire
 - Marital Status – if married but enrolling as single, make sure spousal waiver is completed
 - SSN's for every subscriber and dependent
 - Birth Dates for every subscriber and dependent
 - Signatures
- ☐ Waivers
 - ☐ For every employee on payroll who is eligible but not enrolling, including dependents and spouse (even when separated) who is eligible but not enrolling on the employees plan
 - ☐ Check to make sure waiver is filled out completely, including the following:
 - Spouse and children's names
 - Type of waiver and what product(s) the waiver is for
 - Reason for waiver (if "other", please provide an explanation)
 - Signature of the employee or the employer
- ☐ Check participation requirements
 - ☐ Group must have at least 75% participation in the health plan. Waivers for other coverage are not included in the eligible count
- ☐ Sales Agreement
 - ☐ Check to make sure the following are filled in:
 - Federal ID #
 - Effective Date
 - SIC Code
 - Employee Probationary Period
 - Plan Desired (please indicate "see attached" where medical rates normally go)
 - Original Signature from Employer
- ☐ Broker of Record Letter
 - ☐ Must include Broker Full Name, Agency Full Name and Broker Number
 - ☐ Must be signed by a company officer