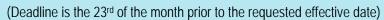
New Business Submission Checklist





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