

Group Rework 2-50 Agent Checklist Small Group Administration

This checklist outlines the documentation required for a request to be processed in a timely manner. Please verify all forms have been completed and the required documentation is included prior to submitting the request. Incomplete or missing information will delay processing. Agents and/or Marketing Assistants will be contacted for any missing information.

Submit requests via email to smallgroupreworks@bcssc.com.

****ALL REQUESTS ARE PROCESSED FOR A CURRENT EFFECTIVE DATE****

OFF ANNIVERSARY CHANGES:

- Off Anniversary Changes require Underwriting approval.
- No carryover or extended benefit period allowed for Metallic plans.

LEVEL FUNDED GROUPS:

- All changes must be approved by Underwriting.

BENEFIT CHANGE

-Benefit Request Form and proposal benefits must match.

-Must be received 15 days prior to the effective date.

- Completed and signed Benefit Request Form.
- Renewal Proposal with group number.

CONTRIBUTION CHANGE

- Request from group on company letterhead or company email with new contribution amount.
- Request should be received before requesting effective date.

DENTAL

- ADDING DENTAL
 - Completed and signed Benefit Request Form.
 - Proposal is needed only if the group is making a benefit change.
 - Applications or census spreadsheet with member dental selections.
- REMOVING DENTAL
 - Request from group on company letterhead or company email.

DUAL OPTION

- ADDING
 - Completed and signed Benefit Request Form to include reason for adding dual option and name of new dual option to include: address and contact information.
 - If no applications/census spreadsheet sent, please advise if client is adding members via BluesEnrollSM /**Employee Navigator** or sending applications/census spreadsheet to group.membership@bcssc.com at a later date.
 - Renewal Proposal (needed only if the new dual option's benefits are different and must have AMMS group number on proposal).

- CANCELLING
 - Request on company letterhead, company email or Benefit Request Form.

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LIFE

- ADDING LIFE
 - Companion Life master application.
 - Member applications/census spreadsheet.
- CHANGING LIFE
 - Signed Companion Life master application.
 - Approval from Underwriting if requesting amount greater than \$15,000.
- REMOVING LIFE
 - Life is removed for the current effective date**
 - Request from group on company letterhead or company email.

NAME CHANGE

- Articles of Amendment or Bill of Sale/Purchase Agreement.
- Request from group on company letterhead.
 - Requires underwriting approval.

PROBATIONARY PERIOD CHANGE

- Request from group on company letterhead or company email with new probationary period.
- Request should be received before requesting effective date.

DEPARTMENTS

- ADDING DEPARTMENTS
 - Need department name (may give specific number or it will be assigned by Small Group).
 - Need spreadsheet with list of members and their department to be assigned.
 - Please note if departments are added, client can no longer receive monthly bill through Blue e-Bill.
- CHANGING OR REMOVING DEPARTMENTS
 - Request from group on company letterhead or company email.

ANNIVERSARY DATE CHANGE – CANNOT BE CHANGED WITHIN 90 DAYS OF RENEWAL

- Request on Benefit Request form or on company letterhead or company email.
 - Requires Underwriting approval.
 - New rates provided by Underwriting.
 - No retro anniversary changes after the renewal cycle has started.

LEVEL FUNDED GROUPS

- Schedule A (must be signed).
- ASA form.
- Benefit Request Form (needed if making changes), (must be signed).