

GROUP CHANGES

Group Rework Agent Checklist

This checklist outlines the documentation required for us to process a request in a timely manner. Please verify all forms have been completed and the required documentation is included before submitting the request. Incomplete or missing information will delay processing. We will contact you for any missing information.

Submit requests by fax to 803-264-0143 or email to group.membership@bcbsc.com.

Off Anniversary Changes:

- Must be approved by underwriting
- Group must change its anniversary date

BENEFIT CHANGE

Group Request for Coverage and proposal benefits must match

Must be received 15 days before the effective date

- Completed and signed Group Request for Coverage
- Renewal proposal with group number

Rate Reduction

- Requires underwriting approval before submitting to group membership
- Renewal proposal with approved rates and group number

Dental Only Plans

Review new dental requirements — Refer to Blue Dental brochure

- Completed and signed Group Request for Coverage
- Membership applications

Adding Dental

- Completed and signed Group Request for Coverage
 - Proposal is needed only if the client is making a benefit change
- Applications or spreadsheet with member dental selections

Removing Dental

- Request from group on company letterhead

Adding Life

- Companion Life master application
- Member applications/census

Changing Life

Life is removed for the current effective date

- Signed Companion Life master application
- Approval from Companion Life 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

Adding A Subgroup — Could Result In A Rate Change

- Completed and signed Group (Benefit) Request for Coverage, reason for adding subgroup and name of new subgroup, to include addresses and contact information
- Renewal Proposal (needed only if the new subgroup's benefits are different than the other groups and must have the "00" number and group number on proposal)

Name Change

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

Anniversary Date Change — Cannot Be Changed Within 90 Days Of Renewal

- Updated Benefit Request Form
- Request from the group on company letterhead with the new anniversary date
 - Requires underwriting approval
 - If there are new rates, they must be received from underwriting

Contribution Change

- Request from group on company letterhead with new contribution amount

Probationary Period Change

- Request from group on company letterhead or company email with new probationary period

Cancel Subgroup

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

Add Departments

- Need department name (can give specific number, or it will be assigned by Small Group)
- Need spreadsheet with list of which members are going to which department
 - For new members, complete the BlueCross Member spreadsheet
 - Please note: If a company adds departments, it can no longer receive the monthly billing statement through Blue e-Bill

Change In Ownership

- Official document of an acquisition or merger with current owner, sales agreement/Bill of Sale or Articles of Incorporation to include any changes to employees and assets and the change that took place