



## **NEW GROUP INTAKE REQUIREMENT CHECKLIST — GROUPS 51+ (PROSPECTIVE)**

**Important: Please complete and submit the information required below at the time of sale.**

**GROUP NAME:** \_\_\_\_\_

**EFFECTIVE DATE:** \_\_\_\_\_

- Account Record Summary:** Completed, signed and dated by account no more than 30 days prior to effective date. Please consult your BCBSD Account Executive for more information.
- Rate Sheet**
- Census/Account Roster** (reflecting final enrollment and showing all eligible employees): must be signed and dated
- Employee Applications** (originals)
- Waiver of Coverage** (WOC) forms, if applicable, for employees and/or dependents not electing health, vision and/or dental coverage
- Medicare Secondary Payer Form**
- Broker of Record Letter** (on employer's letterhead)
- Check or ACH** for first month premium
- EasyPay Form** (optional)\*
- Your BlueConnection for Employers Enrollment Form** (registration for electronic enrollment is mandatory for all new groups with an effective date on, or after, 11/1/09)

### **Additional Information Needed for Health Savings Account (HSA) Groups:**

**Employer:**

- HSA Group Set-Up Form**
- HSA Deposit Transmittal Form**
- Web-based HSA Banking Registration Form**

**Employee:**

- Authorization for Release of Information** signed by each employee
- HSA Declaration Form** signed by each employee

### **Additional Information Needed for Health Reimbursement Arrangement (HRA) Groups:**

- HRA Group Set-up Form**
- BCBSD HRA Authorization Agreement for ACH/EFT transactions**
- HRA Internet Banking Form** (optional — for viewing purposes)
- Bancorp Bank Deposit Agreement Form**
- Bancorp Bank Authorization for ACH debits/credits with voided check**

**For BCBSD Use Only:**

- |                                               |                              |                                                          |
|-----------------------------------------------|------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Priority Control Log | <input type="checkbox"/> BRU | <input type="checkbox"/> Copy of Check and Deposit Sheet |
| <input type="checkbox"/> Email Notification   | <input type="checkbox"/> SRA | <input type="checkbox"/> ARS Signed                      |