



Blue Balance FundedSM Quoting Eligibility Checklist

Determine your new or existing small group's eligibility before you quote.

Yes No

- Will Blue Cross and Blue Shield of Montana (BCBSMT) be the exclusive stop loss carrier?
- Has the employer maintained group health coverage for at least the last 12 consecutive months?
- Are at least 75 percent of the group's eligible employees enrolled in the current group health plan?
- Will the employer satisfy the 75% minimum participation requirement?
- Will the employer satisfy the 50% minimum employer contribution requirement?
- Has the group been involved in bankruptcy proceedings either currently or within the last 12 months?
- Are the employer's current premiums or monthly fees paid current?
- Do retirees and COBRA participants equal 15% or less of the total number of enrolled employees?

Accounts must satisfy these eligibility requirements to qualify for a Blue Balance Funded ASO program. We reserve the right to revise or withdraw the proposal if any of the requirements are not satisfied.

Questions?

Talk with your broker/producer or BCBSMT sales executive today.

BCBSMT will review the employer's claims experience and payment history to confirm eligibility for the Blue Balance Funded suite of services.

The stop loss policy will be issued in Montana and BCBSMT will be the exclusive third-party administrator and stop loss carrier for the memberships we administer.

BCBSMT reserves the right to request certain information from Employer regarding the status of Employer's plan. Certain types of plans or arrangements are not eligible for the Blue Balance Funded suite of services, including but not limited to: (i) multiple employer welfare arrangements (within the meaning of ERISA Section 3(40)); (ii) plans or arrangements not governed by ERISA (such as church plans and governmental plans)

Employers who purchase the Blue Balance Funded suite of services will not be eligible to renew their contracts at the next renewal period if the Employer's enrollment exceeds 50 enrolled employees, or if the Employer fails to satisfy the minimum enrollment requirement of 10 enrolled employees or 75 percent of employees eligible for coverage (whichever is greater).