

ENROLLMENT CHECKLIST FOR NEW GROUPS
INDEPENDENCE BLUE CROSS
AND
KEYSTONE HEALTH PLAN EAST
(Required 16 days prior to effective date)

GROUP NAME: _____

PERSONAL CHOICE and KEYSTONE - HMO OR POS
(75% of 20+; 100% of 2-19 groups must enroll)

- Is **Application for Small Employer Health Benefits** included and completed?
 - Broker information listed?
 - Group information listed?
 - Coverages selected on back?
 - Is it an original signature/application?
 - Is the Tax ID # listed?
 - Employer signed at bottom?
 - If 2-9 in size, is only ONE Rx option being offered?
 - If 10+ in size, are only TWO Rx options being offered?
- Copy of the **ROAM quote is attached**
- Is **UC-2** included?
 - Is it the most recent quarter?
 - Is it signed?
 - Does the company name and address match Blue Group Enrollment form?
 - Make sure to cross out terminated employees.
 - Make sure to write P/T next to part-time employees.
 - Do number of apps match up to number of employees listed on UC-2?
 - If apps do not match # enrolling, are there waivers?
- If **no UC-2, See section below.**
- Are **individual applications** completed?
 - Signed by employee?
 - Is it an original blue/red ink application?
 - Employer section completed & signed
 - Birthdates and SS#s listed for each employee and dependent?
 - If Keystone application, was a PCP selected for member/dependents?
- If **waivers** are included, are they filled out correctly?
 - Waiving due to spousal coverage?
 - Is it original blue/red ink waiver?
 - Carrier listed with policy number?
- Is **premium check** included?
 - If Personal Choice, is it made out to Independence Blue Cross?
 - If Keystone, is it made out to Keystone Health Plan East?
 - Does address on check match Group application address?
 - If address differs from the paperwork submitted, is a letter included with paperwork to explain why
- Cover letter** indicating group's intentions

WHAT IF'S.....

- If officers enrolling are not on the UC2, you must provide Articles of Incorporation or Company Minutes with names and titles printed.
- No UC-2, or enrollees are not listed on a UC2 report?
 - o **Group must complete the Small Employer Certification form**
 - o If new hire, is UC-2 letter included, with employees' names and SS#'s printed.
 - o If partnership, need partnership papers with all partners's names printed.
 - o If owners, need group's or owner's Schedule C tax filing.