



Small Group Submission Checklist

The following documentation will help you prepare and submit new cases in the small group market.

- Is the business a candidate for small employer group coverage?** (one to 50 total eligible employees on payroll)
- New Small Group Application (BPA)** – Must be completed, signed and dated by the employer (get the most current version of the form at bcbsmt.com). Application includes Proxy Form.
- Employee Enrollment Applications/Waivers** – Application or declination for each eligible employee is required; employees must complete, sign and date. A completed census may be substituted for application/waivers.
- Proof of Wages** – Most recent quarterly wage report from the Montana Employer’s Unemployment Insurance (UI-5) or other payroll documents.
Mark/Indicate employee status as full time, part time, terminated, seasonal etc.
- Montana Supplemental Employee Verification Form** – Needed for employees (including new hires) not listed on the proof of wages documentation (i.e., payroll reports, UI-5 reports, etc.).
- Proof of Montana Business** – Required only if a current quarterly UI-5 wage report is not available. Examples of proof of business are Certificate of Existence from the Secretary of State, copies of filed incorporation documentation. If you are unsure about what documentation can be submitted, please contact your Sales Executive.
- Employer Group Information (EGI) Form** – Must be signed and dated by the employer.
- Ensure the Group Meets** the 75 Percent Participation Requirement – excluding employees with other health coverage.
- Initial Premium Binder Payment** – Required effective immediately upon sale of new groups.

How to submit: Must be completed in Blue Access for ProducersSM (eSales)

Questions? Call your Sales Executive.

Online Resource: bcbsmt.com