



Blue Balance FundedSM Quoting Eligibility Checklist

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

Yes **No**

- Is the group a Small Employer? Did they employ between 1 and 50 total employees (including full- and part-time, and seasonal employees) on business days during the preceding calendar year?
- 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 maintain a minimum participation of 10 employees or 75 percent of eligible employees (whichever is greater) during the policy period?
- Will the employer maintain a maximum enrollment of 50 employees?
- Will the employer contribute at least 50 percent of the total 'Employee Only' monthly fees (administration fee, stop loss premium, and projected claims funding) for the lowest-cost program?
- 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?
- Are 10 percent or less of the enrolled employees retirees and/or COBRA participants?
- Is the employer's group health plan a single employer plan governed by the Employee Retirement Income Security Act ("ERISA")?

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 general agent, producer or Blue Cross and Blue Shield of Texas (BCBSTX) sales executive today.

BCBSTX 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 Texas and BCBSTX will be the exclusive third-party administrator and stop loss carrier for the memberships we administer.

BCBSTX 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 Balanced 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); and (iii) plans or arrangements established or maintained by professional employer organizations, employee leasing companies, staffing companies, cooperatives, or similar arrangements

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).

Blue Cross and Blue Shield of Texas, a Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

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