

## Balanced Funding Small Group Quote Checklist

### To obtain an illustrative quote, the following is required:

- Small Group Quote Request Form
- Highmark member level census form for all eligible employees, their spouses and dependents complete with assumed enrollment designations (enrolling, waiving)

### To obtain a final quote, the following is required:

- Balanced Funding Group Application
- Highmark member level census for all eligible employees, their spouses and dependents complete with final enrollment designations (enrolling, waiving)
- Medical Questionnaire for each enrolling member (paper questionnaire or FormFire)

### To finalize a sale, the following is required and will be collected by the Highmark Implementation Team:

- Applicable tax documentation as defined by Underwriting Guidelines
  - Unemployment Compensation Tax Report, Wage and Tax documentation or year-to-date payroll
  - Ownership documentation
- Final proposal signed by the group
- Client and producer contact information
- NY Department of Health Document, if applicable
- Spending Account Group Application for HSAs or FSAs, if applicable
- Highmark Legal documents
  - eDelivery Agreement and user forms
  - Instruction to Release (ITR)
  - Bilateral Agreement and user forms
  - Master Health Service Agreement
- Banking forms packet
  - Authorization for HM Life Insurance Company to receive stop-loss payments
- Producer Appointment paperwork for Highmark and HM Life Insurance Company, if applicable
- Data Collection Form (DCF) to grant Employer Portal access to the client
- Multi-client access form to grant Employer Portal access to the producer
- Other documentation, as needed, based on client specific details