**2024 Independence Blue Cross Group Checklist**

**General Requirements**

1. 2024 New Small Group Employer Application
2. 2024 Employee Application for Small Employer Coverage
3. Dated Broker of Record Letter on Business Letterhead
4. Waiver Forms (see acceptable waiver reasons on page 5 of 2022 Small Group Underwriting Guidelines)
5. Eligibility Form for Owners/Partnerships- This is needed if the owner(s) is not listed on the UC2A form (need tax docs listed on the form in addition)
6. Current quarter UC2A form or fully-completed Small Employer Certification along with documents if group is too new to have a UC2A or if they do not file a UC2A
7. Copy of quote with plan’s monthly rate signed by owner (rates change by quarter, so make sure the quoted rates match requested effective date)
8. Group will be invoiced for first premium
9. If Group chooses an HMO, each Employee Application must indicate Primary Care Physician.

Submit Paperwork by the 15th of the month prior to effective date (if the 20th falls on the weekend, submit by the following Monday)

Custom Benefit Plans, Inc.