Blue Balance Funded℠
Enrollment Documentation & Paperwork Submission Checklist

The following checklist includes the list of required paperwork necessary to setup an Blue Balance Funded account for New and Existing Business of groups with 25 to 100 employees. Incomplete paperwork submitted to Account Operations will not be accepted and will be returned to Account Management.

Please ensure paperwork is completely filled out with required signatures to prevent account setup & enrollment processing delays.

Blue Balance Funded℠ Specific Paperwork

☐ Blue Balance Funded Administrative Services Agreement (ASA)
ASA establishes the duties and responsibilities of both the Employer and the Administrator (HCSC)
- Key fields to ensure are completed upon receipt from Broker: Signature, Title, Date

☐ Blue Balance Funded Benefit Program Application (BPA)
Complete the BPA prior to sending to the broker for signature
- Key fields to ensure are completed upon receipt from Broker: Enrollment section, Employee Eligibility information, Payment Specifications , Reimbursement Provision, Employer Contribution, Signature, Title, Date

☐ Blue Balance Funded Stop Loss Coverage Application
Contract between the Employer and the Stop-Loss Insurance Carrier (HCSC), that includes details specific to the Stop-Loss Insurance coverage and coverage amounts (ISL & ASL)
- Key fields to ensure are completed upon receipt from Broker: Signature, Title, Date

☐ Blue Balance Funded Stop Loss Coverage Policy
Standard policy document that describes how Stop-Loss Insurance works, and outlines each party's responsibilities (Plan Sponsor & HCSC)
- Does not require to be returned for account setup

Standard Enrollment Paperwork

☐ Business Associate Agreement (BAA)

☐ Employee Enrollment Applications: – Application or declination for each eligible employee is required (LGDE spreadsheet can be utilized)

☐ Proof of Wages – Most recent quarterly wage report from the Texas Workforce Commission (TWC) or other payroll documents. Mark/Indicate employee status as full time, part time, terminated, seasonal etc.

☐ Texas Supplemental Employment Verification Form – Needed for anyone (including new hires) not listed on the proof of wages documentation (i.e., payroll reports, TWC reports, etc.)

☐ Employer Group Information Form – Must be signed and dated by the employer *(new business only)*

☐ Initial Monthly Payment *(new business only)*

Questions?

Refer to Account Management training materials for further in depth details on each document.

Any other specific questions related to paperwork should be directed to your Unit Manager.