



BlueCross BlueShield
of Montana

Blue Balance FundedSM Quoting Eligibility Checklist

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

Yes No

- ☐ ☐ Does the employer group have a minimum of 5 or a maximum of 150 employees enrolled?
- ☐ ☐ Has the employer maintained group health coverage for at least the last 12 consecutive months?
- ☐ ☐ Are at least 75% of the group's eligible employees enrolled in the current group health plan?
- ☐ ☐ Will the employer satisfy the 50% minimum employer contribution requirement?
- ☐ ☐ Is the group in good financial standing (no current or previous bankruptcies in the past 12 months)?
- ☐ ☐ Is the employer up-to-date with current premiums or monthly fees?
- ☐ ☐ Do COBRA participants equal 10% or less of the total number of enrolled employees?

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? Contact your BCBSMT representative today.

Upcoming Deadlines for 2026 Blue Balance Funded Quote and Enrollment

If your group has a renewal/effective date of the 1st of:	Quoting Last Day to Submit	Enrollment Last Day to Submit
January	12/10/2025	12/15/2025
February	01/10/2026	01/15/2026
March	02/07/2026	02/12/2026
April	03/10/2026	03/15/2026
May	04/09/2026	04/14/2026
June	05/10/2026	05/15/2026
July	06/09/2026	06/14/2026
August	07/10/2026	07/15/2026
September	08/10/2026	08/15/2026
October	09/09/2026	09/14/2026
November	10/10/2026	10/15/2026
December	11/09/2026	11/14/2026

*Producers may solicit quotes through eSales. Underwritten quote requests and enrollment are conducted by your BCBSMT sales executive.

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

BCBSMT 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)

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 150 enrolled employees, or if the Employer fails to satisfy the minimum enrollment requirement of 5 enrolled employees or 75 percent of employees eligible for coverage (whichever is greater).