

Carrier

Quarterly Wage Report/DE9C not required for:



No DE9C is required for 5+ enrolling for groups with current coverage.

Excludes Virgin groups, Groups with 10% of EEs residing out of CA, and groups with more than 20% COBRA enrollments.

Underwriting Highlights:

Pick 10: mix and match any combination of plans and networks.

Participation Promotion: Small groups enrolling 5-100 need to meet 25% participation. Standard 60% participation applies to groups enrolling 4 or less subscribers.

QWTS Requirements: Quarterly Wage & Tax Statements not required on groups enrolling 5 or more. QWTS is required for groups with less than 5 enrolling, no current employer group coverage, more than 10% of employees located outside CA, or more than 20% are COBRA/Cal-COBRA employees.

Note: Information is subject to change and carriers can request additional documents as needed.



- No DE9C required for 3+ enrolled
- Must provide a copy of the most recent prior carrier bill.
- Payroll is required for eligible employees not listed on the bill
- New hire letter if required for newly hired employees not yet listed on the prior carrier bill or payroll
- Virgin groups are excluded from promotion.

DE9C Not Required for Specialty

Anthem Small Group will be allowing additional network flexibility:

Now Employers can select one of the following pairings:

- Both PPO Networks alongside any Two HMO networks **(Including Vivity)**
- Both PPO Networks alongside Select HMO, Priority Select HMO, and Vivity HMO networks (Excluding California Care HMO)*.

Underwriting Highlights:

- **Relaxed Participation:** Enrolling 5+ need to meet 25% participation. Standard 60% participation for groups with 3- 4 enrolled employees.
- **Valid Waivers:** Individual coverage both on and off the exchange will be accepted as a valid waiver (in addition to waivers due to Medicare, Medi-Cal or military, or covered as a dependent on a spouse or parent's group plan).

Note: Information is subject to change and carriers can request additional documents as needed



DE9C not required for groups with 3-95 FT/FTE eligible employees

- Owners are not included in the count of eligible employees
- PEO's, Union/Non Union, Start ups, Spin offs and Multiple Employer groups do not qualify for the no DE9C guideline

A DE9C may be requested for groups of all sizes when:

There are eligible employees aged 70+

Groups with 2+ employees residing at the same address

Groups whose legal entity is listed as 'other'

Groups of 1 enrolling

Blue Shield reserves the right to require documentation such as a DE9C or payroll register for groups of any size at their discretion



Carrier

Quarterly Wage Report/DE9C not required for:



DE9C not required for Sole Proprietors.



No DE9C is required for 6 + enrolling

- A copy of the most recent prior carrier bill is required
- Must submit payroll for EE's enrolling that are not listed on the prior carrier bill.



FOR SMALL
BUSINESS

Required



health net

• **Enhanced Choice Promo:** Groups of 4+ enrolled: No DE9C, payroll or ownership docs, No prior carrier bill required. No participation requirement when 10 or more employees enroll. 4-9 enrolling employees need 25% participation. Health Net can be written alongside other carriers. Now employees enrolled on another carrier through the same employer plan will not count against participation.

• **Sell HMO with 6 Package:** Groups of 6+ enrolled: No DE9C, payroll or ownership docs, No Participation attestation, No Prior carrier bill, No Waivers (when paired with life or employer paid dental/vision), No Participation requirement.



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PERMANENTE

Groups of 1+ enrolling

Business Documentation required (example: business license/SOI)

Start Up groups and groups leaving a PEO do qualify for this promotion



No DE9C is required for groups with 5+ enrolled EEs



Required.



Required.



Guideline:

Groups with 3+ enrolling can submit a Participation Certification form in lieu of a DE9C. If in business less than a year, submit at least one applicable tax document.

DE9C is not required for groups of 10+ eligible employees for all other out-of-state groups.