REQUIRED FOR GROUPS 1-50

WASHINGTON

You have made the positive choice to join Regence

Finish up with these next steps

Checklist for sold quotes (Groups enrolling 1-2 active employees must also complete additional steps on the next page)

Items on the list are required for all new sold small group quotes. The eGMA process will help you navigate the checklist and submit the required forms.

Required are:

- Completed Group Master Application and signed Regence rate sheet(s).
- Member enrollment or waiver data for each enrolling and waiving employee.
    - Enrollment and waiver information* (required when submitting through eGMA) or completed Application for Enrollment/Change or Waiver Form.†
        - All enrolling employees must complete and sign an application form.
        - Submit waivers for each eligible employee who is not enrolling, including Name of Carrier, if applicable.
        - If the group is offering both Medical and Dental, waiver information is required for both.
- Commonly controlled groups wishing to combine as one group must submit an Ownership Verification Form.
- Completed Domestic Partner or Incapacitated Dependent affidavits (if applicable).



Additional eligibility requirements may apply if the group isn't headquartered in Washington. Please contact your Regence representative for more information.

To secure an effective date, all completed forms must be submitted to Regence by the **15th of the month prior** to the requested effective date. If additional information is needed, the requested effective date may be deferred.

Don't cancel any existing policies until we confirm we've accepted the group and send you the group ID number. **Please don't send a check until the group is billed.**

Submit required information via eGMA or email it to the attention of your Regence sales representative at **FAXSBUNewsales@regence.com**. Please call **1 (800) 505-6801** for more information.

*For enrollment in eGMA, applications and waivers are not required to be sent to Regence. All applicable supporting documentation must be obtained and kept by the group. †Applications must be submitted on the most recent form. No quotes can be released on old application forms. Current applications must be signed within 90 days of the group's effective date.

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The following requirements apply to groups enrolling 1-2 active employees

When you've completed the checklist on the prior page, follow these next steps

Step 1. Provide the following for all employees and working owners, whether enrolling them or not:

- Most recent Quarterly Unemployment Insurance Wage and Tax report (Wage and Tax report) from each state where your employees work. (This is the Washington Quarterly Tax Report & Wage Detail Report (UI Quarterly Report, Form 5208 A&B) filed via EAMS to the Washington State Employment Security Department. If you have employees in other states, submit the equivalent form/report for each state.)
- Note any employees who are not eligible and provide the reason (seasonal, terminated, part-time).

Step 2a. If the Wage and Tax report isn't available for certain employees, provide ONE of the following for those employees instead, whether enrolling or not (Wage and Tax reports are still required for all other employees):

- Two weeks payroll: Most recent payroll report showing two consecutive weeks of official payroll, including hours worked and wages. The report must be from the official payroll for the company's bookkeeping and display the company's name.
- W-4 Form: If the employee is newly hired and does not have two weeks of payroll yet, a signed W-4 Form may be provided instead. A complete W-4 Form will include all the applicable steps and the information in the Employers Only section.

Step 2b. If the Wage and Tax report isn't available for certain working owners, provide ONE of the following for those working owners instead, whether enrolling or not (Wage and Tax reports are still required for all other working owners):

- Two weeks payroll: Most recent payroll report showing two consecutive weeks of official payroll, including hours worked and wages. Report must be from the official payroll for the company's bookkeeping and display the company's name.
- IRS Form 1040 (Sole Proprietor): First two pages plus Schedule C, E or F.
- IRS Form 1065 (Partnership): First four pages plus K-1s for all owners, including those waiving coverage. Ensure that the ownership shares for the K-1s submitted total 100%. Note any owners who don't perform work for the group or who don't work enough hours to be eligible.
- IRS Form 1120 (C Corp): First four pages.
- IRS Form 1120S (S Corp): First four pages plus K-1s for all owners, including those waiving coverage. Ensure that the ownership shares for the K-1s submitted total 100%. Note any owners who don't perform work for the group or don't work enough hours to be eligible.
- Business License Application, Articles of Incorporation/Organization, or Business Operating Agreement: Document must show owner name(s).
- IRS Form W-2 or if newly hired, provide a signed W-4. (e.g., an officer of a C Corp may submit their W-2). A complete W-4 Form will include all the applicable steps and the information in the Employers Only section.
- Regence Verification of Employment (VOE), completed and signed.

Step 3a. (if applicable) Additional documentation required for S Corps: If the ONLY enrolling employee(s) are owners and owners' spouses, and your company changed from a Sole Proprietorship to an S Corp since the last time you filed business taxes, submit the IRS Form 2553 in addition to the documentation above.

Step 3b. (if applicable) Additional documentation required for C Corps or Partnerships: If the ONLY enrolling employee(s) are owners and owners' spouses, and your company changed from a Sole Proprietorship to a C Corp or Partnership since the last time you filed business taxes, submit the IRS Form 8832 in addition to the documentation above.

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Regence BlueShield serves select counties in the state of Washington and is an Independent Licensee of the Blue Cross and Blue Shield Association

Regence BlueShield
1111 Lake Washington Blvd N, Suite 900 | Renton, WA 98056

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