

Please complete the following required forms and provide the necessary information.

Renewal group paperwork checklist: OptiFlex

The documents in **Section 1** are required to confirm the sale.

Section 1

Sold confirmation paperwork		
	Proposal Rate Exhibit (provided by Sales)	Review and sign.
	Group Verification Report (GVR) (provided by Sales)	Review and sign.
	Summary of Contract Changes (provided by Sales)	Review and sign.
	Self-Funded Health Plan information Recipient List	Only required if making changes to current access.
	Personal Funding Account Step Up Form (PFA)	Only required for HSA Personal Funding Account Administration.

The documents in **Section 2** are used to collect member enrollment information. The employee enrollment forms do not need to be submitted to Premera since the enrollment information is entered through the Vimly SIMON portal, but groups should keep copies of the forms on file.

Section 2

Group setup information		
	Member Enrollment and Change Application Member Enrollment and Change Application (Spanish version)	Complete employee enrollment form for medical and/or dental benefits.
	Personal Funding Accounting Enrollment and Change Application	Complete employee enrollment form for HSA Personal Funding Account.
	Disabled Dependent Certification	Complete form to request overage Disabled Dependent Certification review. Submit to Premera.
	Other Coverage Questionnaire Enrollment Other Coverage Questionnaire Enrollment (Spanish version)	Complete and list each person that will access claims information. Include all group and producer representatives.

Employer forms are also located on our website at: www.premera.com/wa/employer/resources/forms/



BLUE CROSS

An Independent Licensee of the Blue Cross Blue Shield Association

046862 (04-11-2022)