

Member Retro Submission Tip Sheet: Required Documentation



Add New Subscriber



- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email, web confirmation or electronic file
- ☐ Application with all required (change) information, signatures or copy of electronic file or web transaction with signatures
- ☐ Proof of payroll deductions, pay stubs or payroll system screen shot
- ☐ Proof of involuntary loss of prior coverage (with effective date and members covered listed)
- ☐ Marriage Certificate (if marriage is qualifying event)
- ☐ Acknowledgment of premium impact
- ☐ Proof of Broker/TPA/Group oversight

Add Dependents & Spouse



- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email, web confirmation, electronic file
- ☐ Application with all required information with signatures or electronic file or web transaction
- ☐ Marriage Certificate
- ☐ Domestic Partner Affidavit
- ☐ Court Order & QMSCO (if applicable)
- ☐ Certificate of Adoption
- ☐ Copy of visa with entry date stamp
- ☐ Proof of payroll deduction change (if applicable)
- ☐ Proof of involuntary loss of prior coverage (with effective date and members covered list)
- ☐ Proof of Broker/TPA/Group oversight
- ☐ Dependent Student Recertification Form and college transcripts

Termination



- ☐ Retro request exception form or group email
- ☐ Proof of prior submission e.g., copy of email
- ☐ Proof of Broker/TPA/Group oversight
- ☐ Copy of electronic file or web transaction COBRA Notice
- ☐ Death Certificate/Obituary
- ☐ QMSCO Disenrollment form (if enrollment was court-ordered)
- ☐ Proof of new coverage (with effective date and members covered list)
- ☐ Evidence of Termination e.g., group's system screenshots, letter of resignation

Change in Coverage



- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email, web confirmation, electronic file
- ☐ Proof of qualifying event
- ☐ Completed application with all required information with signatures or copy of electronic file or web transaction
- ☐ Proof of payroll deduction change
- ☐ Proof of Broker/TPA/Group oversight

Reinstatement



- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email or web confirmation, electronic file
- ☐ Application with all required information with signatures or web confirmation or electronic file
- ☐ Disabled dependent recertification approval
- ☐ Dependent Student Recertification Form and college transcripts
- ☐ COBRA proof of payment
- ☐ Proof of continuous employment and deductions
- ☐ Proof of Broker/TPA/Group oversight

Vision:

Maximum allowable retro review will only consider up to 90 days.

Abbreviations:

QMSCO –
Qualified Medical Child Support Order

TPA –
Third Party Administrator

Please Note:

Additional documentation may be needed requests are handled on a case-by-case basis. Providing the outlined required documentation does not guarantee approval.

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Atención: Si habla español, contamos con ayuda gratuita de idiomas disponible para usted. Consulte el documento adjunto para ver las formas en que puede comunicarse con nosotros.

注意：如果您说中文，我们可为您提供免费的语言协助。请参见随附的文件以获取我们的联系方式。

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