



Blue Balance FundedSM Quoting Eligibility Checklist

Determine your small group's eligibility before you quote.

Yes **No**

- Is the group ERISA eligible?
- Has the employer maintained group health coverage for at least the last 12 consecutive months?
- Are at least 70% of the group's eligible employees (after valid waivers are subtracted) enrolled in the current group health plan?
- Will the employer satisfy the 50% minimum employer contribution (of the employee-only cost) requirement?
- Is the group in good financial standing in the last 12 months (no previous or current bankruptcy proceedings)?
- Is the employer up-to-date with their payments to their current insurance provider?
- Do non-active enrollees (COBRA, 1099) equal 10% or less of the total number of enrolled employees? (Retiree coverage is not available through Blue Balance Funded.)

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 BCBSIL 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	12/12/2025	12/22/2025
February	01/12/2025	01/22/2026
March	02/09/2026	02/19/2026
April	03/12/2026	03/22/2026
May	04/11/2026	04/21/2026
June	05/12/2026	05/22/2026
July	06/11/2026	06/21/2026
August	07/12/2026	07/22/2026
September	08/12/2026	08/22/2026
October	09/11/2026	09/21/2026
November	10/12/2026	10/22/2026
December	11/11/2026	11/21/2026

The last day to quote is 20 days prior to the effective date; the last date to submit enrollment is 12 days prior to the effective date. Deadlines do not exclude weekends and federal holidays.

Enrollment

Producers can quote and enroll in Blue Balance Funded through the eSales Tool application. (An underwritten Blue Balance Funded quote is required.) Documentation for online enrollment will be generated and sent via email through a secure DocuSign process for signatures. Please make sure that the email address **DocuSign_System_dse@docusign.net** is not directed to your spam or junk folders.



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of Illinois

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[VIEW COMPLETED DOCUMENTS](#)

All parties have completed AMATEST_IL_SG_BBF2026 - Final BCBS Documents for Signature.

AMATEST_IL_SG_BBF2026

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

BCBSIL 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 Balance 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 50 enrolled employees, or if the Employer fails to satisfy the minimum enrollment requirement of 15 enrolled employees or 75 percent of employees eligible for coverage (whichever is greater).