The following updated Highmark resources are now available under the resources tab in Plan Advisor. As a reminder, please follow the guidelines below to determine when each form should be used:

PA LTR-062 – Client Change Letter of Explanation template:

Click here to access form

- Eligibility Changes (at renewal only) – includes new hire waiting period, eligibility hours, adding or changing dependent coverage
- Demographic Changes
- Group Name Change*
- EIN Change*****
- Ownership Change/Business Structure Change*

This form must be submitted on company letterhead, signed by an authorized company representative. Also include a brief explanation for the change indicated.

*****Underwriting may request additional information regarding these changes.

SEF-035 Eform WPA – General Update Changes for Small Group Form:

Click here to access form

- Address Changes for these contacts only:
  - Contract Signor
  - In Charge of Monthly Reports
  - Billing
  - Correspondence
  - Spending Account**

- New Contact Name and Title for these contacts:
  - General*
  - Contract Signor*
  - In Charge of Monthly Reports*
  - Billing*
  - Correspondence*
  - Spending Account**

*Please include an email address for each contact.
**Changes to a spending account financial contact and/or address requires an updated HRA/HSA application, as well as a new DCF form to remove the previous administrator and add new administrator for online access to this account.

5.13.2020 (Account Management – Mary White)