



Professional Employer Organization Arrangements

Montana - as of July 14, 2017								
Market Type	Policy Model	Policy Type Code	Endorsements*	Experience Rating Modification Application - While in a PEO Arrangement	Experience Rating Modification Application - Upon Termination of a PEO Arrangement	Data Reporting	Assigned Risk Supplemental Forms	NCCI Filing(s) and Circulars
Voluntary Market	<ul style="list-style-type: none"> • Master • Multiple PEO Policies 	Master <ul style="list-style-type: none"> • Code 2 • Code 6 or <ul style="list-style-type: none"> • Code 3 • Code 8 • Code 6 	Master PEO Policy <ul style="list-style-type: none"> • No specific endorsement Client Policy <ul style="list-style-type: none"> • WC 25 03 02 	Master PEO experience rating modification applies to the PEO's portion of the premium and any other policy covering the PEO's direct employees. Client experience rating modification applies to each Client's portion of the premium and any other policy covering the Client's direct employees.	Master PEO experience rating modification applies Policy of Former Client Client experience rating modification applies	Master Normal unit statistical reporting	N/A	Item 09-MT-99 (Circular MT-00-01)
		Multiple PEO Policies <ul style="list-style-type: none"> • Code 3 • Code 5 • Code 6 	Multiple PEO Policies PEO Policy <ul style="list-style-type: none"> • WC 25 03 01 A • WC 25 03 03 Client Policy <ul style="list-style-type: none"> • WC 25 03 02 	Multiple PEO Policies <ul style="list-style-type: none"> • PEO Policy—PEO experience rating modification applies • Client Policy—Client experience rating modification applies 	Multiple PEO Policies Client Policy for Non-Leased Workers			

* Applicable Endorsements must be reported on Policy Record Type 7

This Comparison is provided as a reference only. All information is subject to change and dependent on notification from the state. In the event that there is a conflict between the applicable state statute and/or regulation and this chart, the applicable state statute and/or regulation will control. Please refer to the state's website for additional information.

Disclaimer:

This guide is comprised of materials and information which are proprietary to NCCI and are protected by United States and international copyright and other intellectual property laws.

This guide is provided solely as a reference tool to be used for the limited purpose of providing information regarding policy, reporting, and rating requirements for professional employer organizations and employee leasing arrangements in various states. The information in this guide shall not be construed or interpreted as providing of legal or any other advice. Use of this guide for any purpose other than as set forth herein is strictly prohibited.

The guide is furnished "As Is" and includes information available at the time of publication only. NCCI makes no representations or warranties of any kind relating to this guide, and expressly disclaims any and all express, statutory, or implied warranties including the implied warranty of merchantability and fitness for a particular purpose. Additionally, you assume responsibility for the use of, and for any and all results, conclusions, analyses, or decisions developed, derived or obtained as a result of this guide, and NCCI does not endorse, approve, or otherwise acquiesce in your actions, results, analyses, or decisions, nor shall NCCI have any liability thereto.