Employer Enrollment Tool Maintenance Guide for brokers

Effective April 1, 2023

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i For more information, visit blueshieldca.com/broker

Tool tips

•Use Google Chrome or Microsoft Edge browsers.

•Click view all on the To Do list to see the full list of tasks.

•Access to edit groups and members is determined by profile roles.

•Navigate to the group account using Manage all groups or the search bar.

•Use the dropdown menu filter on the group roster to filter the view from recently viewed, agency book of business, and groups you own.

•Enter the name of the person submitting the transaction on the attestation page.

•Group cancelation will remain outside of the tool. Please contact Producer Services to process group cancelations.

•Enter required fields indicated by a red asterisk.

•ID card orders are available for members with medical plans and are processed at the household level.

•Use the export as CSV button on the member roster to easily download a census report.

Change the way you do business with Blue Shield

The Employer Enrollment Tool uses real time integrations so your transactions are processed immediately!

Tested and approved by your peers

We reviewed your feedback for a better, easier enrollment tool. Focus groups and tool pilots were held to ensure the Employer Enrollment Tool met your expectations.

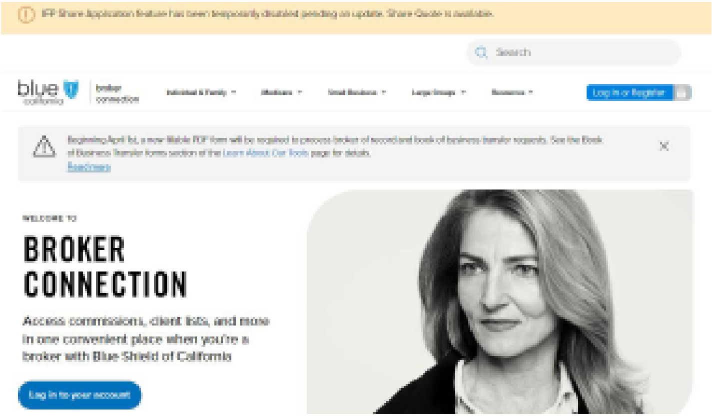
Tool features by line of business

Enroll members	SG	LG
Add dependent	SG	LG
Cancel subscriber	SG	LG
Cancel dependent	SG	LG
Order ID card	SG	LG
Edit member details	SG	LG
Edit member contact info	SG	LG
Edit member plans	SG	LG
Enroll in COBRA	SG	LG
Reinstate subscriber + dependents	SG	LG
Reinstate dependents	SG	LG
Cancel group	SG	LG
Edit group details	SG	LG
Edit group contacts	SG	LG
Edit group plans	SG	
Edit group class plans	SG	
Edit group eligibility offerings	SG	
Edit group contribution amount	SG	
Edit group name + structure	SG	
Edit billing format	SG	
View + export reports	SG	LG
View book of business (broker/ GA)	SG	LG
Manage user profile access	SG	LG
View invoice amount	SG	LG
View payment status	SG	LG
Process pends	SG	LG

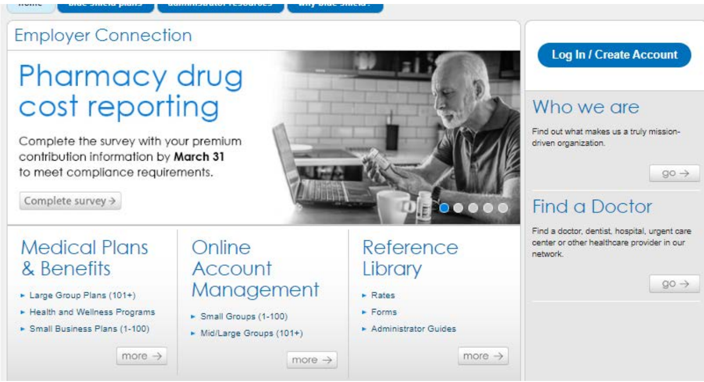
Navigating your Blue Shield portals

Broker Connection

- Broker / GA Employer Enrollment Tool access point
- Self-service username and password support
- Employer Enrollment Tool resource page
- Employer Enrollment Tool downtime messages

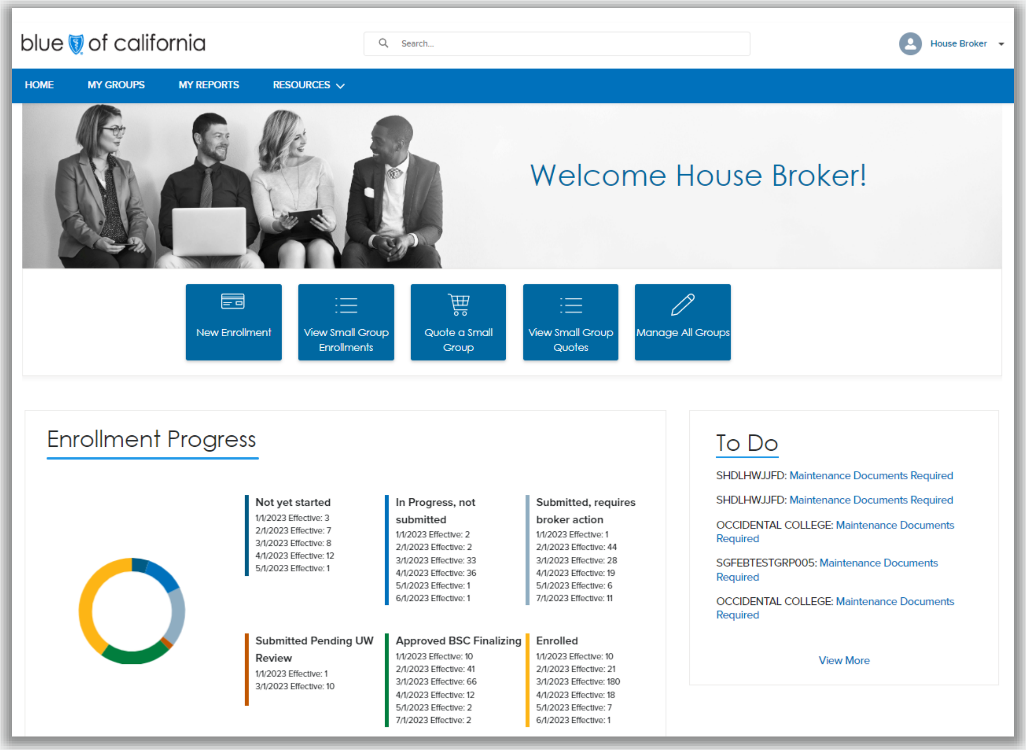


Employer Connection



- Employer/ HR Admin Employer Enrollment Tool access point
- Self-service username and password support
- Employer Enrollment Tool resource page
- Employer Enrollment Tool downtime messages

Home page navigation



Along the top:

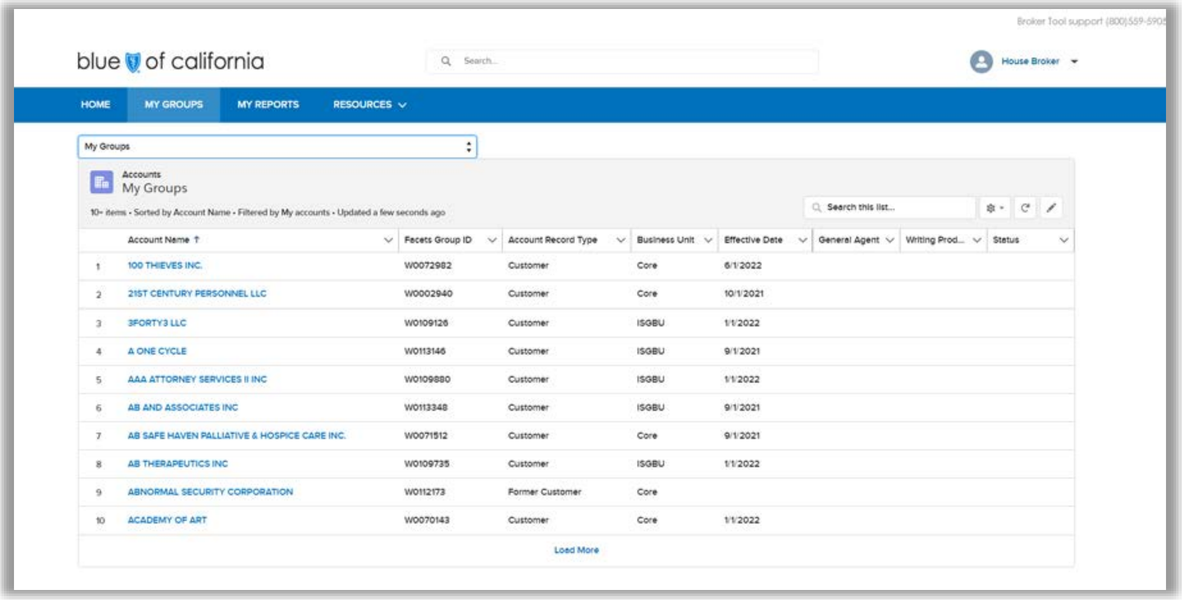
- Search bar allows the user to search records they have permission to view, including quotes and enrollments.
- Home returns the broker to the Employer Enrollment Tool home page.
- My Groups displays any group the broker has quoted or enrolled.
- My Reports allows the brokers to run reports showing how many groups have been approved, are in progress, and what groups need to provide supporting documentation.
- Resources links the broker to Broker User Guide, Tips and Tricks, and New Group Submission Guidelines.

Quick Actions:

- New Enrollment allows the broker to enroll a group. Small Group only.
- View Enrollments displays group enrollments. Small Group only.
- New Quote starts a new quote for a group. Small Group only.
- View Quotes displays group quotes including incomplete ones if Save for Later was selected. Small Group only.
- Manage all groups displays the groups owned by the logged in user and the agency book of business. To submit a group or member record change from the home or landing page, click on the button Manage All Groups.

Select a group

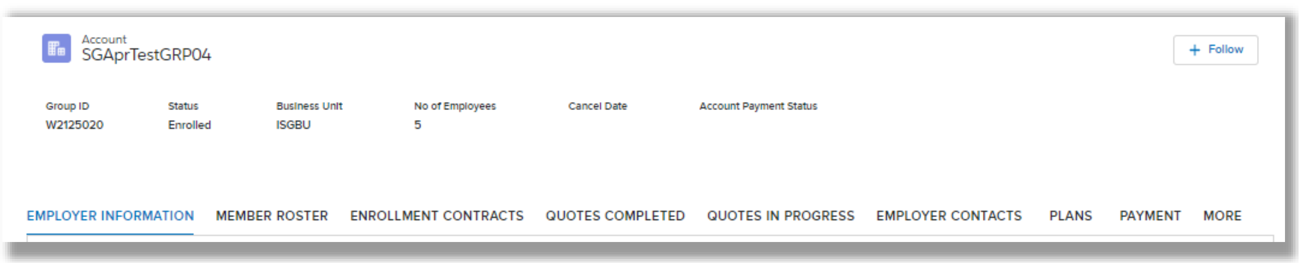
To begin a maintenance record change, select the group from the records displayed. Click on the blue account name to open the group's account record page.



Group account page

The account record page displays information regarding to the group. This is the launch point for all group and member transactions.

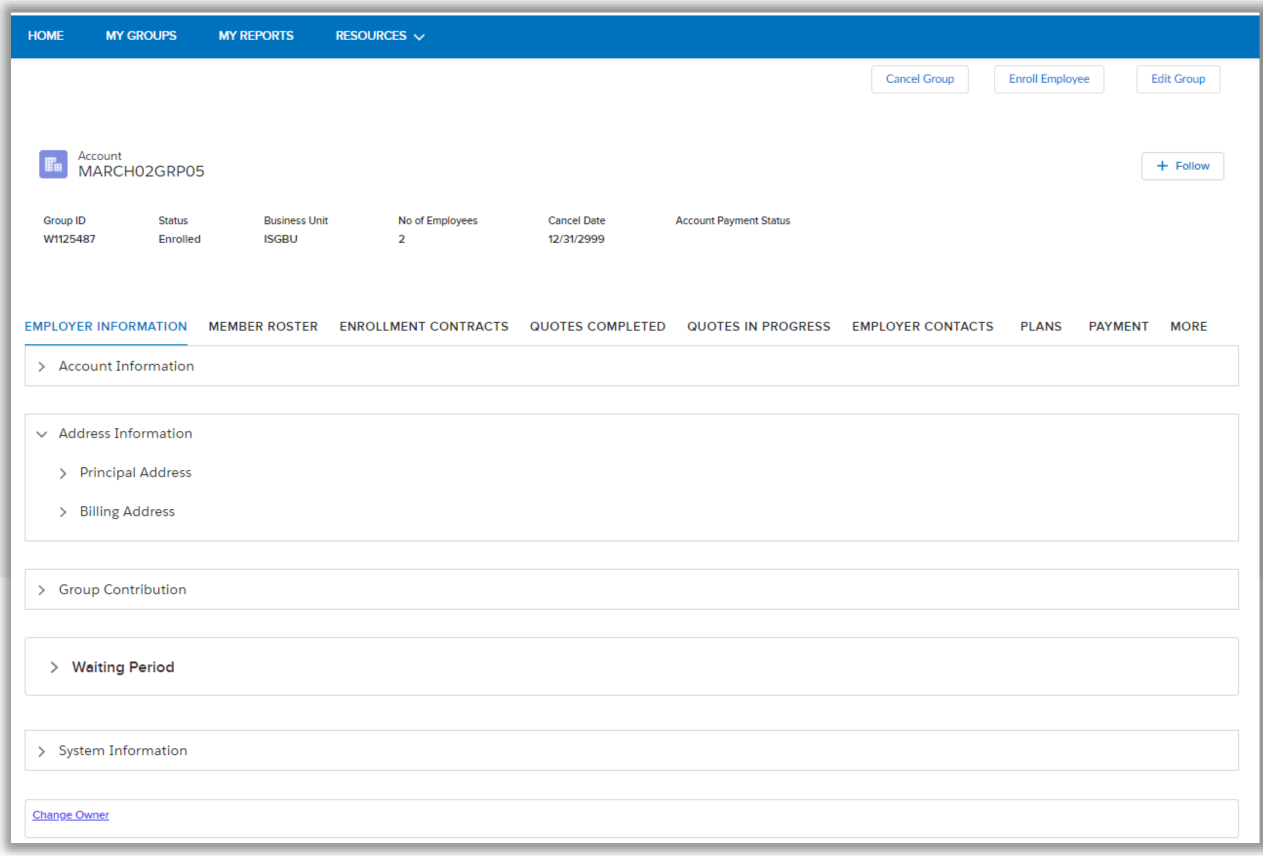
The screen is split it up into different sections and tabs to organize the group's information. Click through the tabs and sections to view the current information on file.



Access permissions – based on the role selected in the Account Management Tool (AMT), you will have different access to your agency's book of business. If you have read/edit access, you will see buttons along the top right of the Group Account page for benefits management. If you have read only access, you will see the information displayed on the Group Account page but will not have the benefits management buttons.

Group maintenance

To initiate a group maintenance record change, click the buttons in the top right corner of the Group Account page.



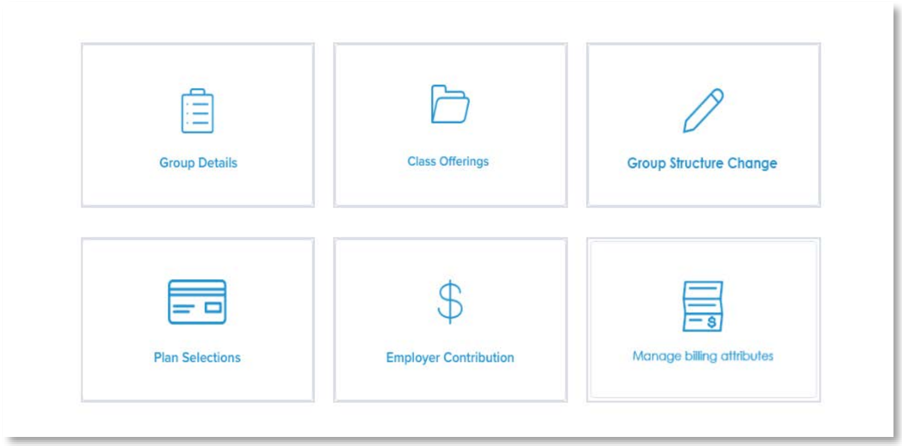
Enroll Employee opens up an enrollment application flow that will guide the user through the enrollment process.

Edit Group opens a screen of cards each a different type of record change. Click on a card to include it in the transaction. Click on multiple cards at one time to submit many different record change types in one transaction.

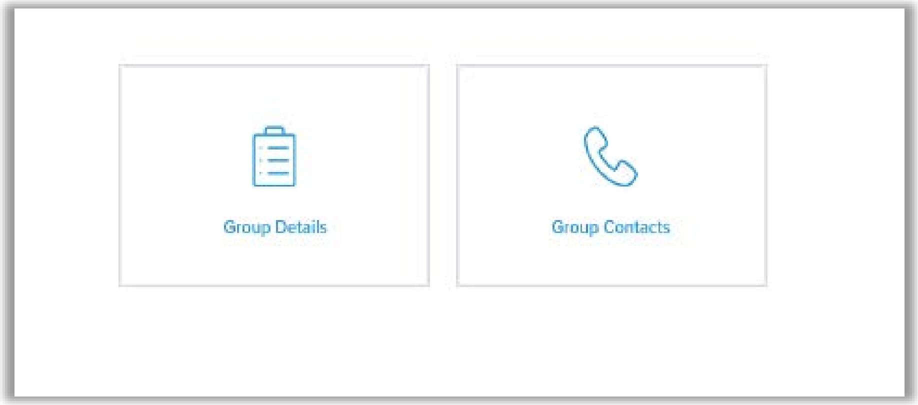
Group maintenance scope

There is different functionality between Core and Small Group. Core groups will have the ability to enroll members, change the demographic details, and change group contacts. Small Groups will have more cards including changes to class offerings, plan selections, and employer contribution amounts.

Small Groups



Core groups



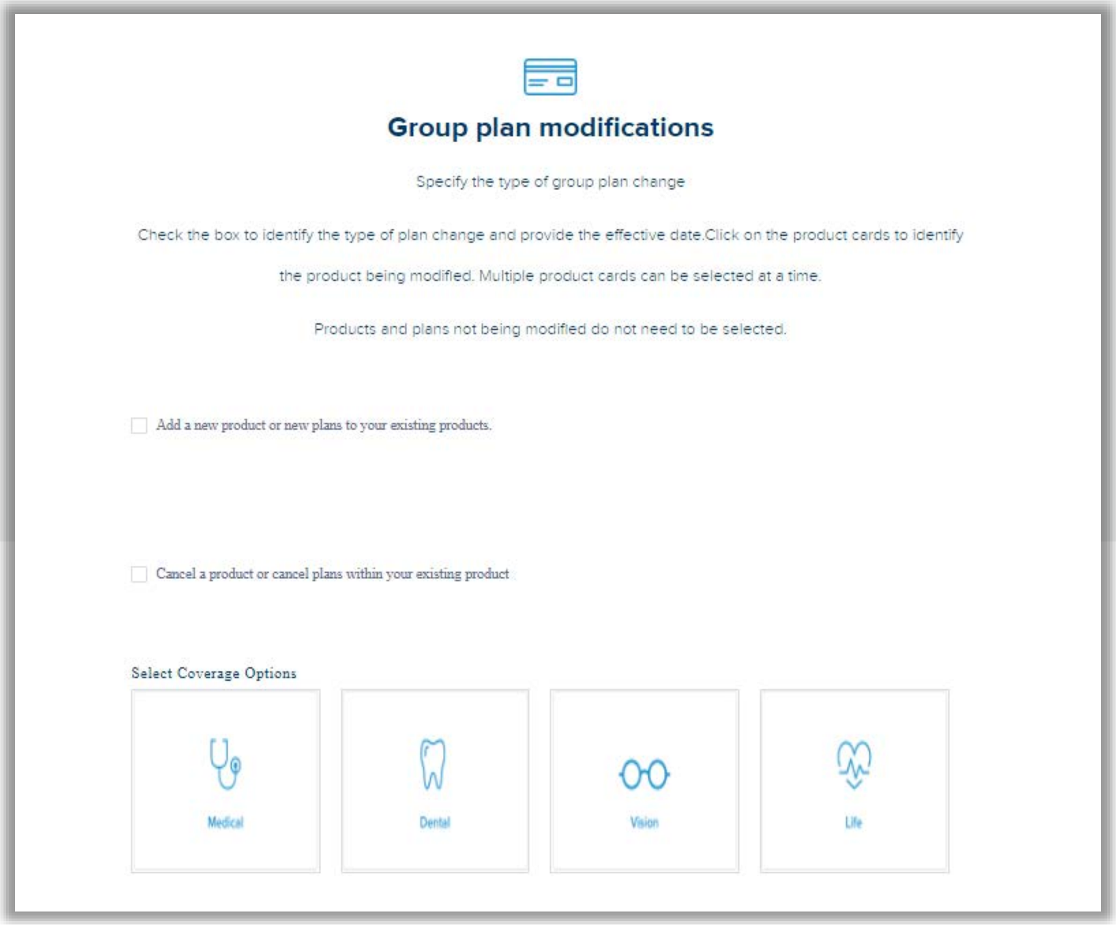
Class Offerings

Use for - Small Group only. Add additional classes onto the group. We will not remove classes from a group, so once they are added they will remain active.

How - The tool will display the current active classes. Select the radio buttons to add a new class. The tool will display an auto calculated effective date for the change to take effect.

Group plan changes

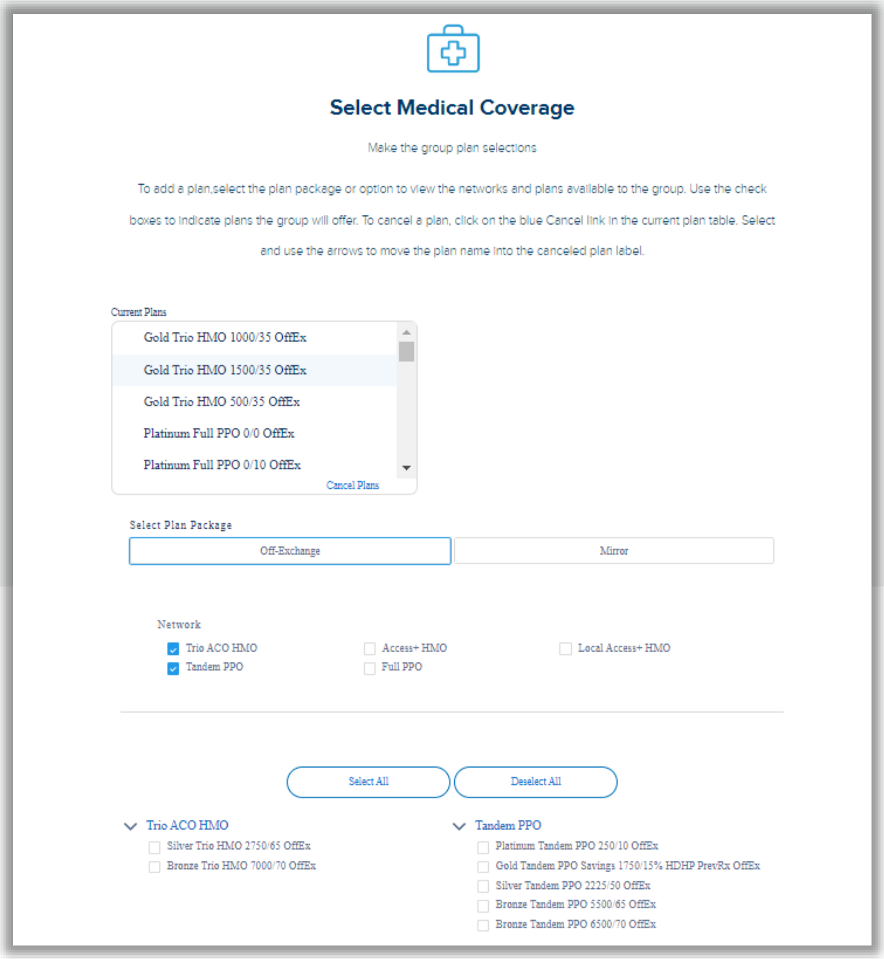
Use for - Small Group only. Group plan changes at both the product and plan level.



How - This transaction has a two-screen workflow. First, identify the type of plan change by checking the box next to that option, enter the effective date, and qualifying event information. Then, select the product related to this change (medical, dental, vision, or life) by clicking on the card. Multiple products/ cards can be selected in one transaction. On the second screen, the tool will show the current plans offered by the group in a scrollable list in the top left of the page.

Group plan changes continued

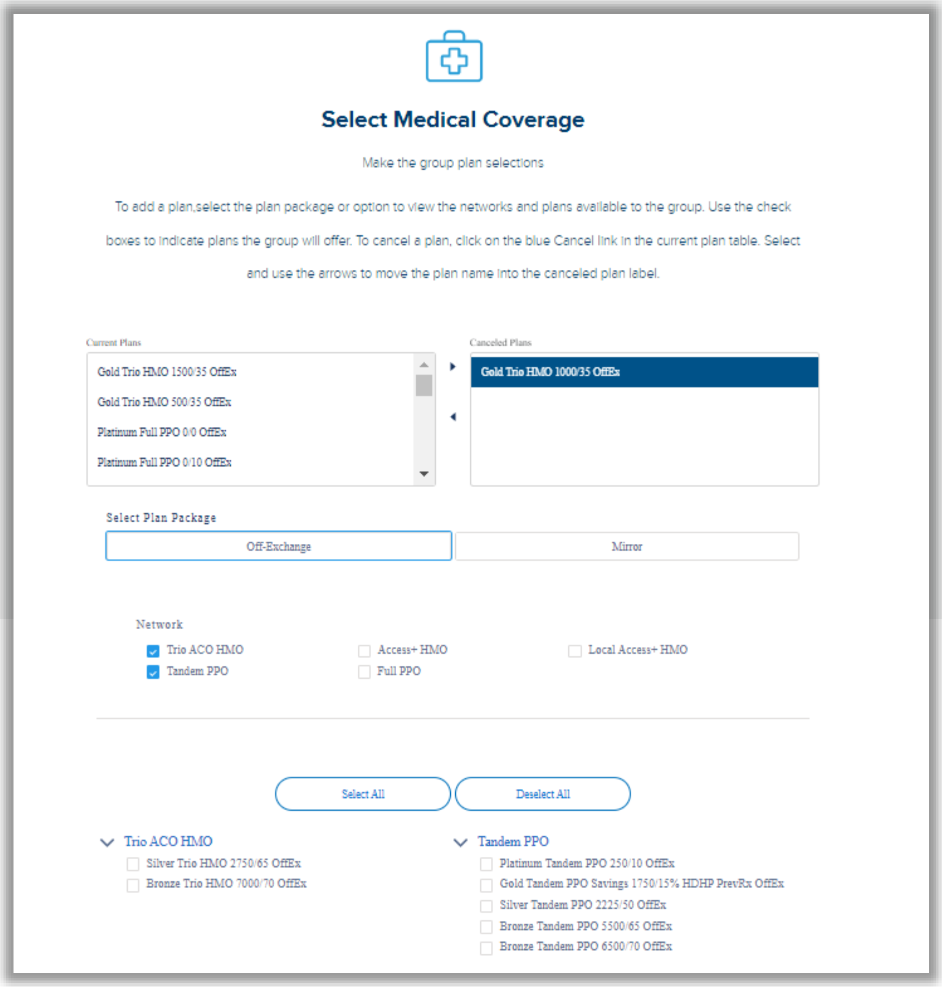
To add a plan-



1) select the plan package (medical) or plan offerings (specialty) type.
2) select from the networks available to the group. *Note we will not show out of network as selectable options.*
3) a list of plans will be presented. Use the checkboxes to mark the plans for the group. *Note use select all or deselect all to select the plans within a whole network.*

Group plan changes continued

To cancel a plan-

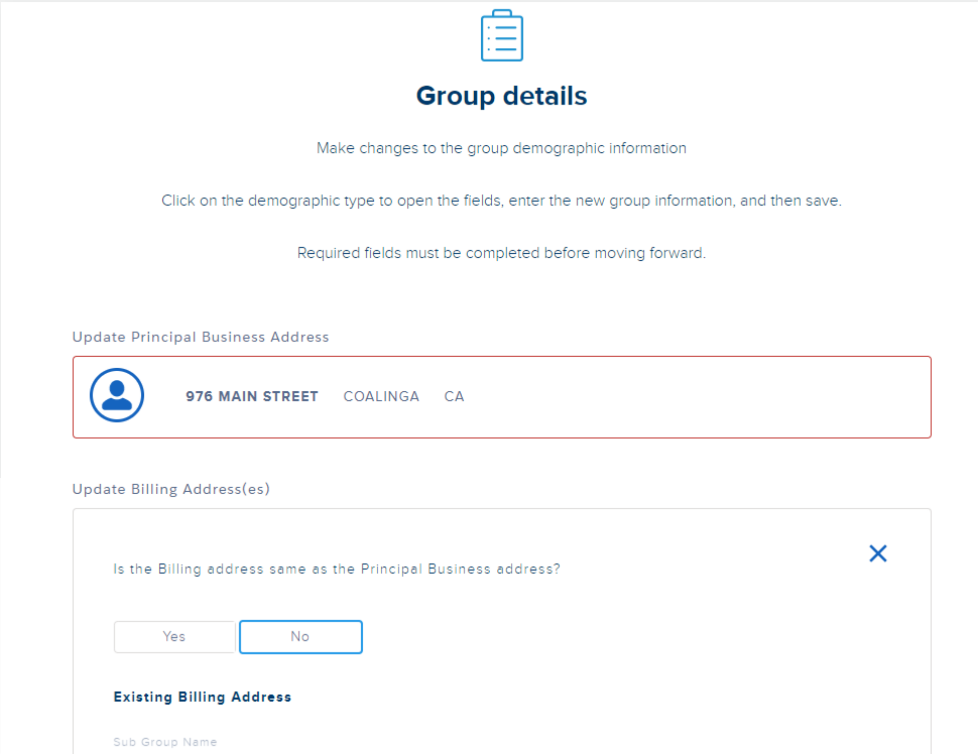


1) In the list of current plans offered by the group, click on the Cancel link. This will expand into two boxes that use toggle arrows to move plan names between the current plans and plans to be canceled.
2) Move a plan into the Cancel box.
3) A confirmation message will display on the screen that the selected plans will be canceled and removed from the group offering.
4) Check the box next to the confirmation message.

Note changes to medical benefits will prompt the tool to re-affirm the selections for the group's infertility rider.

Group details

Use for - Update the principal business address, the business email, phone number, and mailing contact, the billing address, billing telephone, and billing contact.

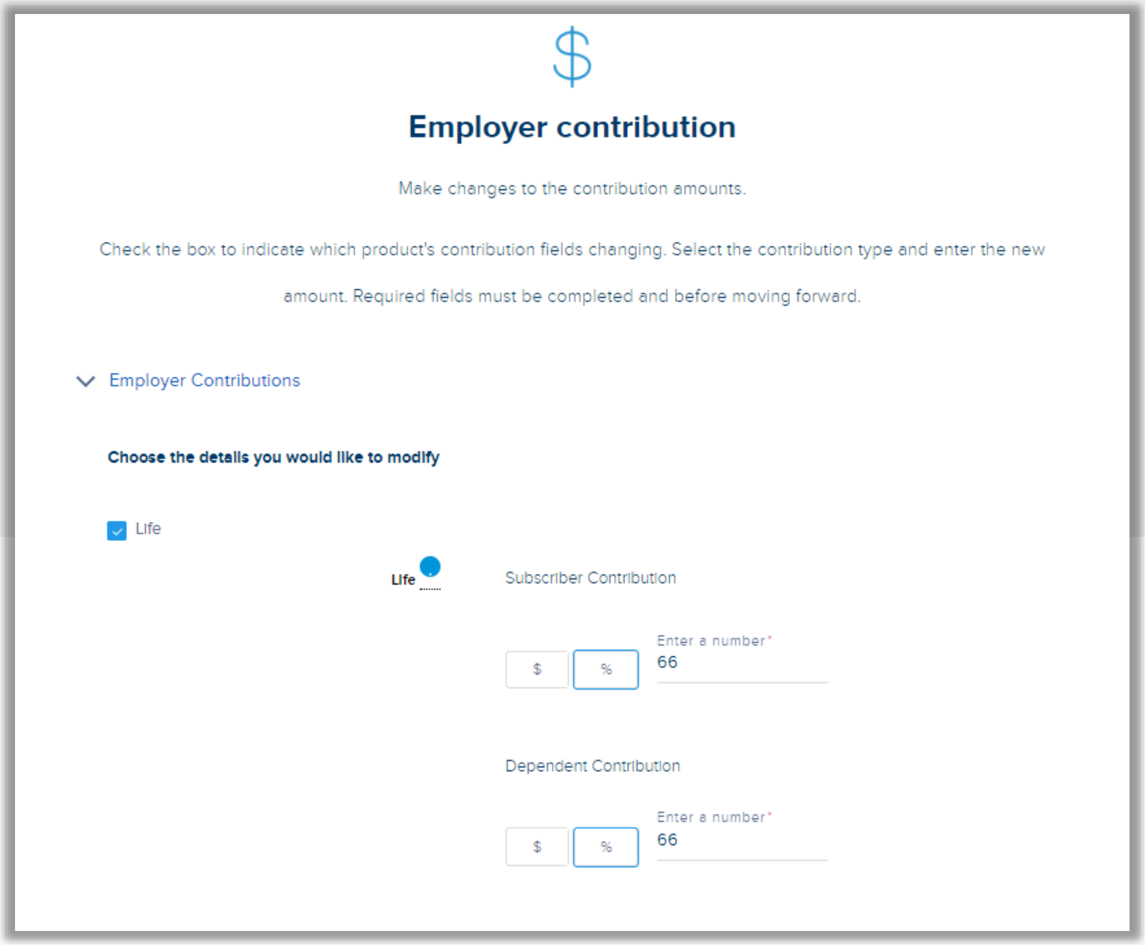


How - Click on the address boxes to open additional fields and begin typing in new information. Click on the save button in the card before clicking Next.

Note users cannot add new contacts this is just updating the ones that we are already associated to this group.

Employer contributions

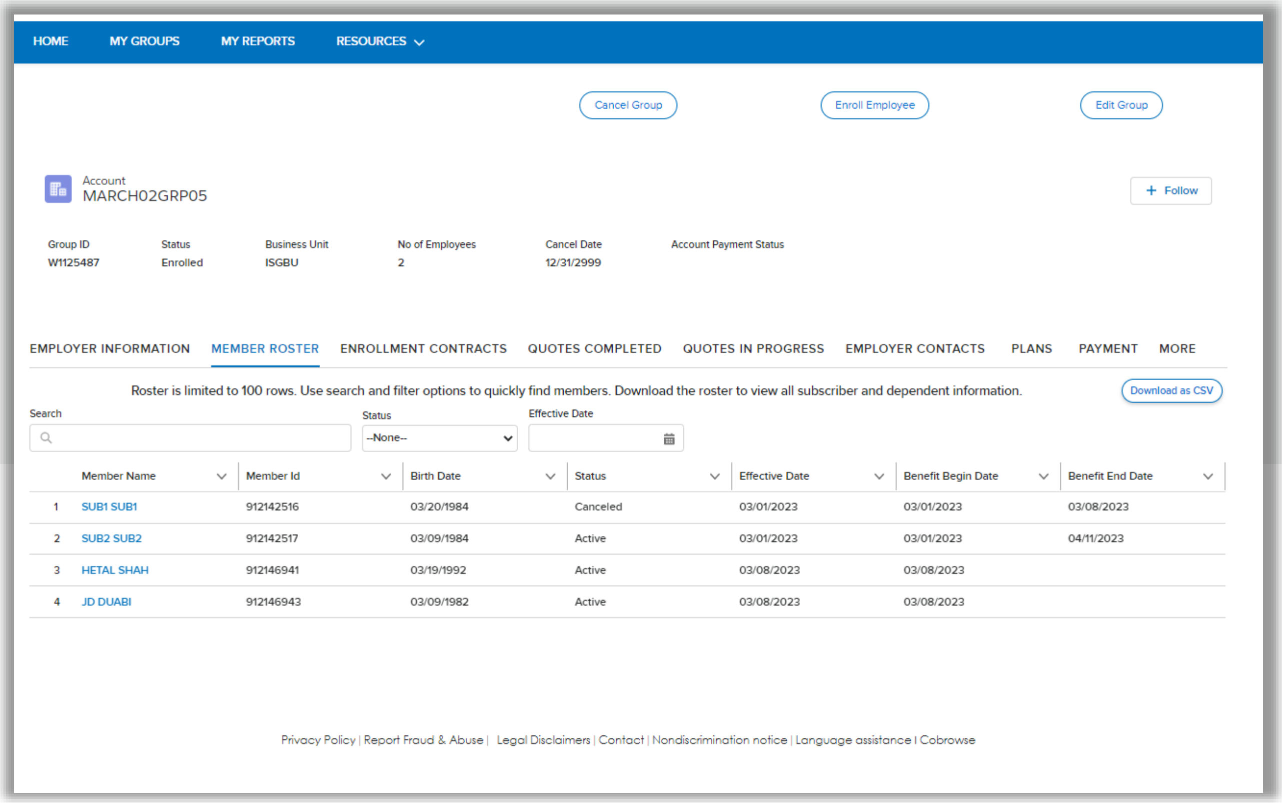
Use for – Small Group only. Update the group's contribution amounts.



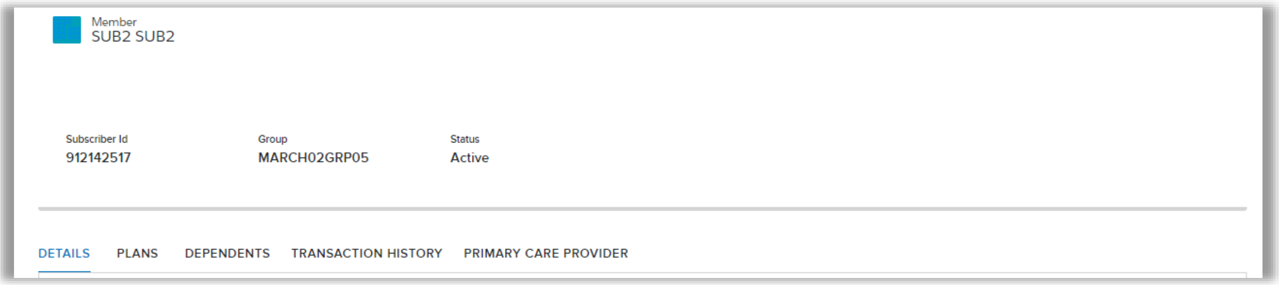
How – Use the checkboxes to select the offered products to make changes. Then select the checkbox to indicate if the contribution is a dollar amount or percentage amount and enter the desired amount.

Member maintenance

To initiate a member maintenance record change, find the group and then the member. Navigate to the Group Account page and click on the Member Roster tab. The tab displays the current contract period subscribers. Select a subscriber from the roster by clicking on the blue linked name.

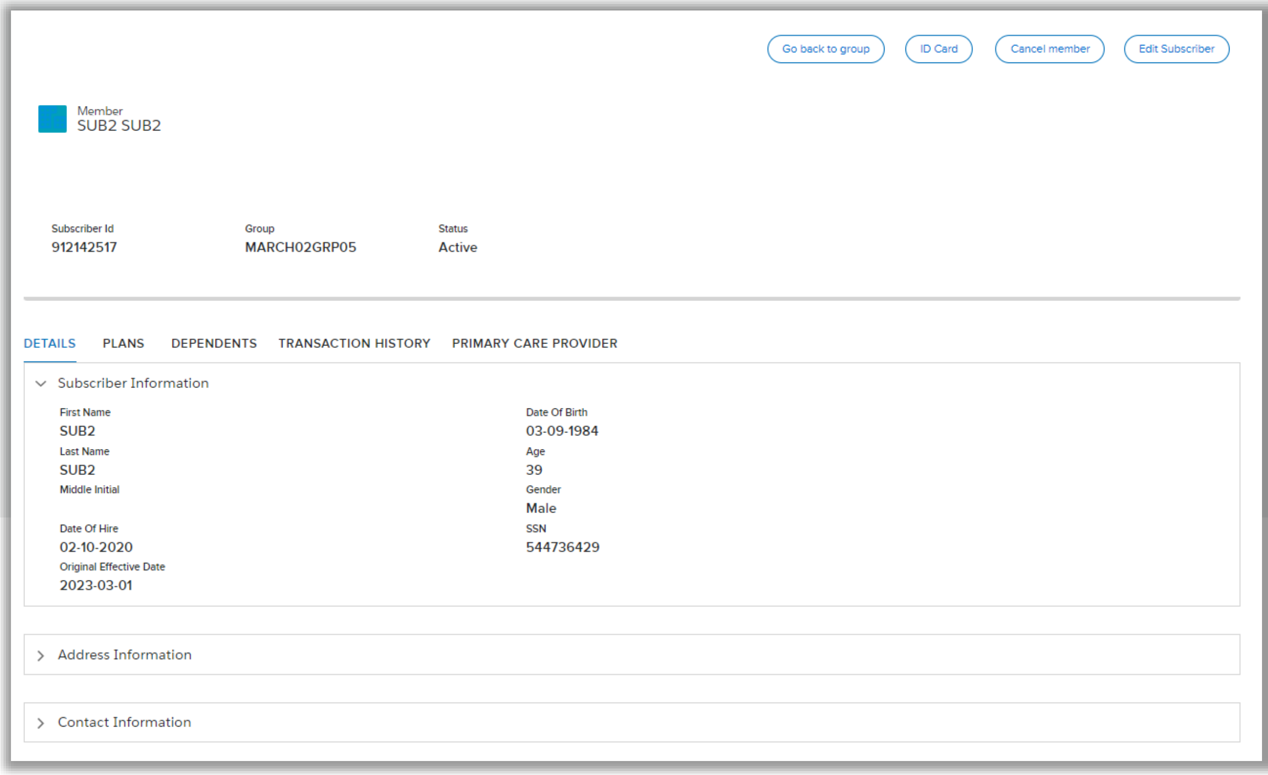


This opens the Member Account page where like the Group Account page, holds all of the valuable enrollment information for the selected person.



Member maintenance

Click the buttons in the top right corner to initiate a transaction for this subscriber and any enrolled dependents.



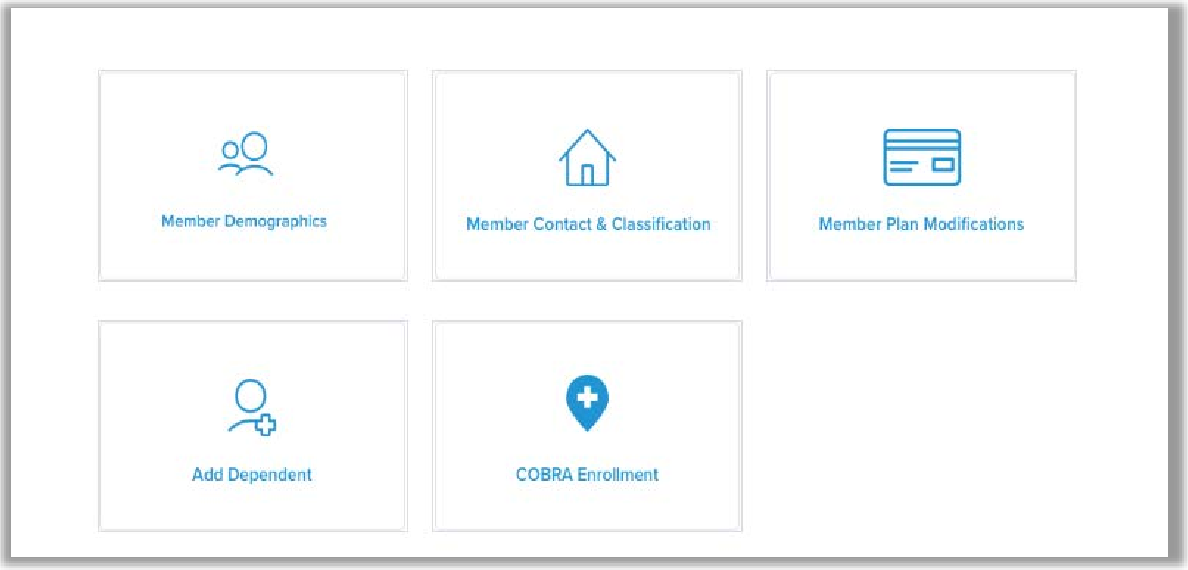
Cancel member will only appear when a the selected subscriber has an active status. Conversely, subscribers with a canceled status will see a reinstate button. The button opens a screen to capture the cancelation information.

Order ID card will be available for medical ID cards. The tool will not display any additional steps or screens but triggers ID cards to be created and sent to the member in their predetermine method of receipt.

Edit subscriber opens a screen of cards each a different type of record change. Click on a card to include it in the transaction. Click on multiple cards at one time to submit many different record change types in one transaction.

Member maintenance scope

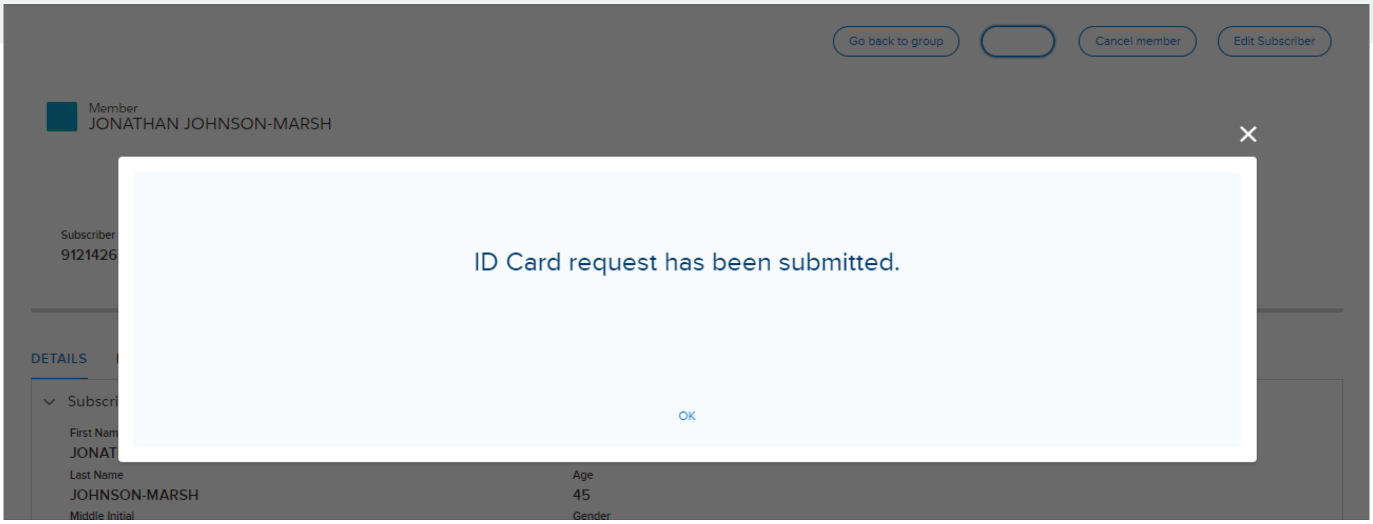
Both Core and Small Group have the full suite of member maintenance functionality.
Additionally, the Employer Enrollment Tool includes all prior Benefits Management Tool functionality.



Member ID card ordering

Use for – Member and member household replacement ID card orders

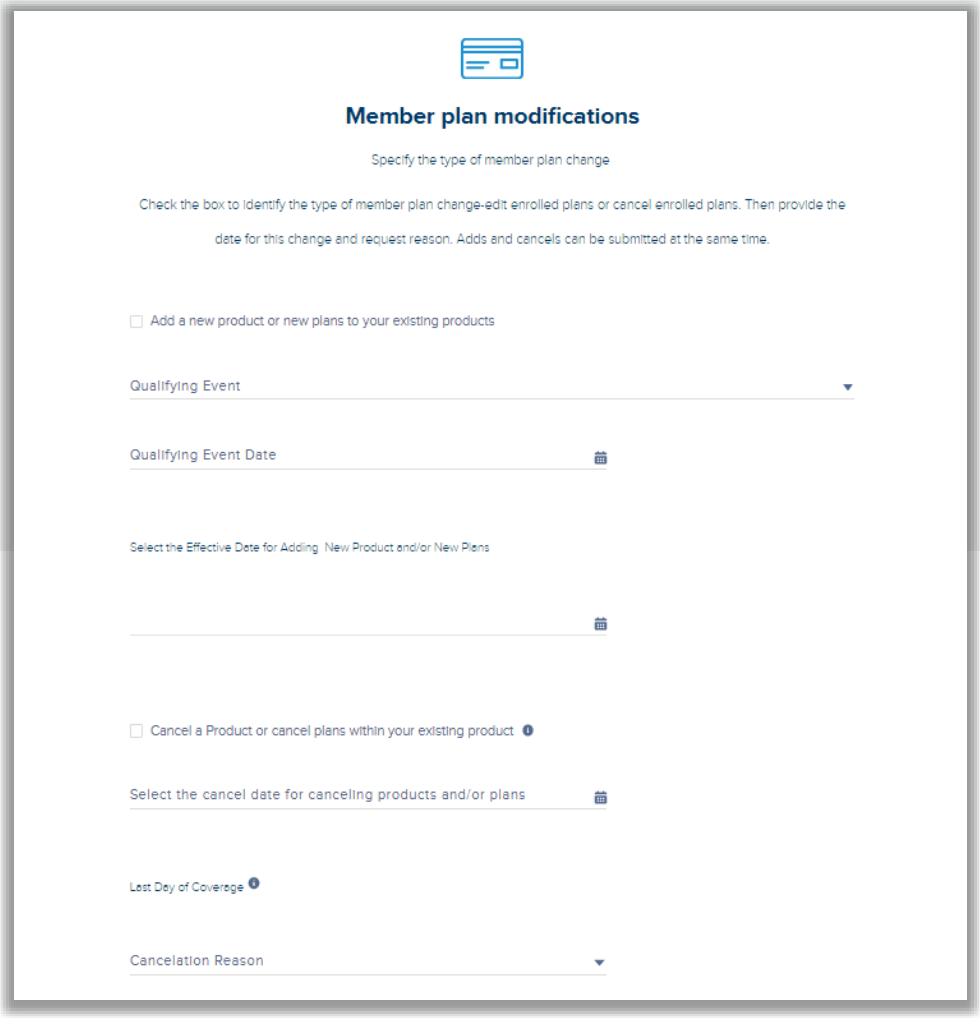
How - Click on the ID card button at the top of the member account page.



A request is immediately sent for a new ID card.

Member plan changes

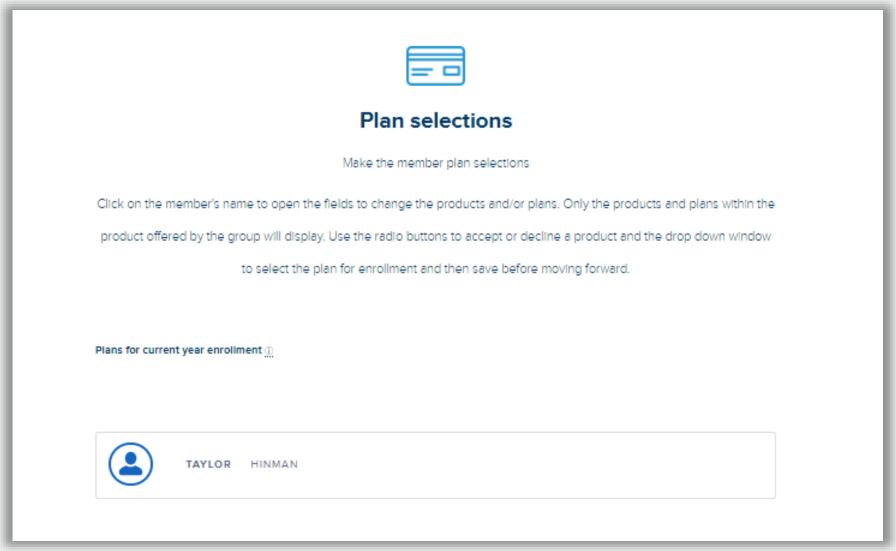
Use for – Member plan changes to products and plans.



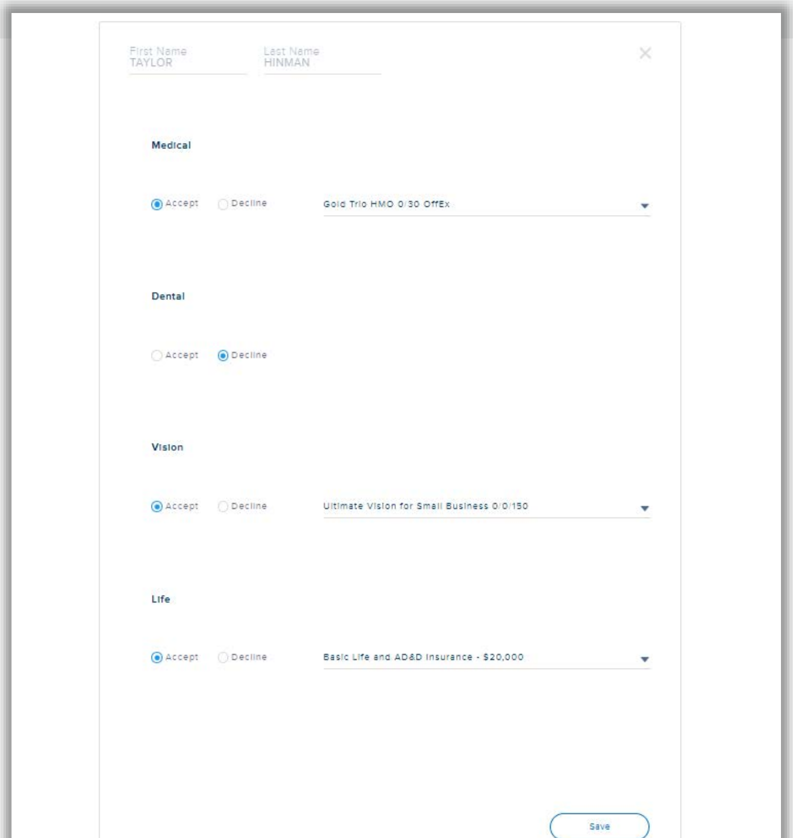
How - This transaction has a two-screen workflow.

1) Identify the type of change by checking the box next to that option, enter the effective date, and qualifying event information.

Member plan changes continued

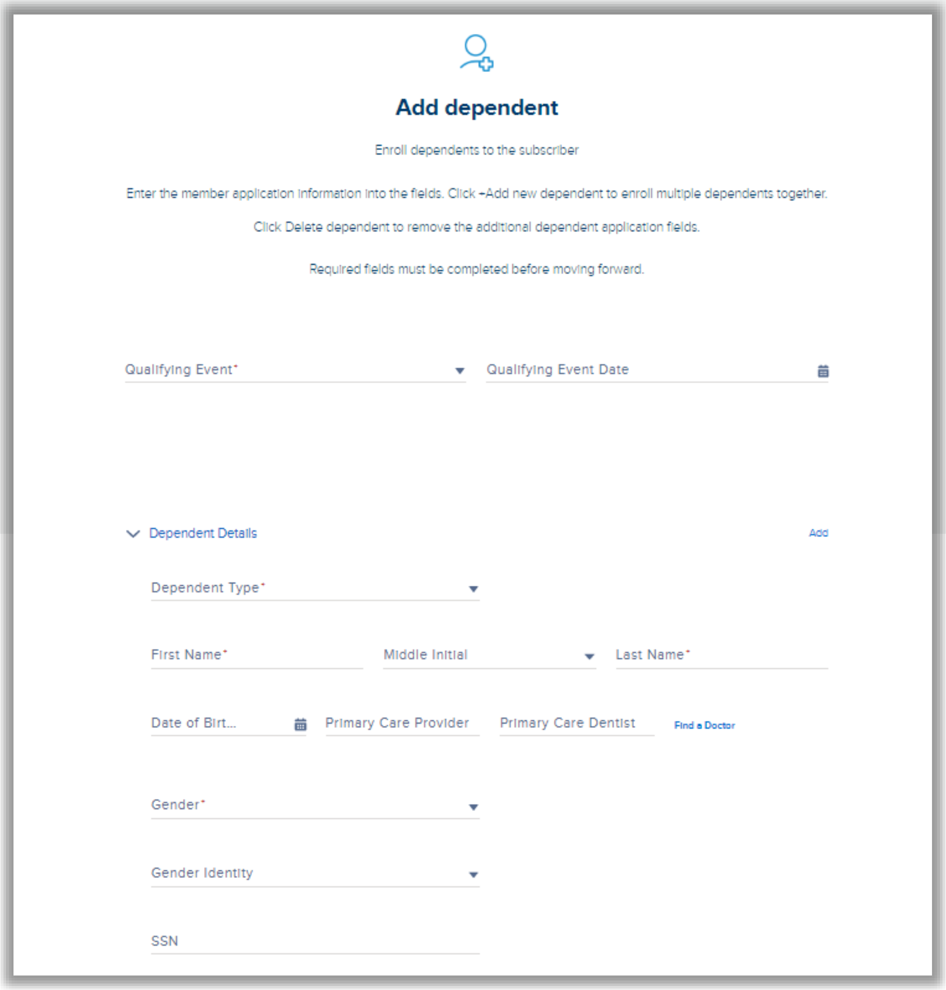


2) Click on the member's name to open the box and view the current plan elections. Use the radio buttons to accept or decline product coverage. For accepted products, use the dropdown window to the right to select an available plan. Click on the save button in the box.



Add dependent

Use for – enroll dependents to an existing subscriber



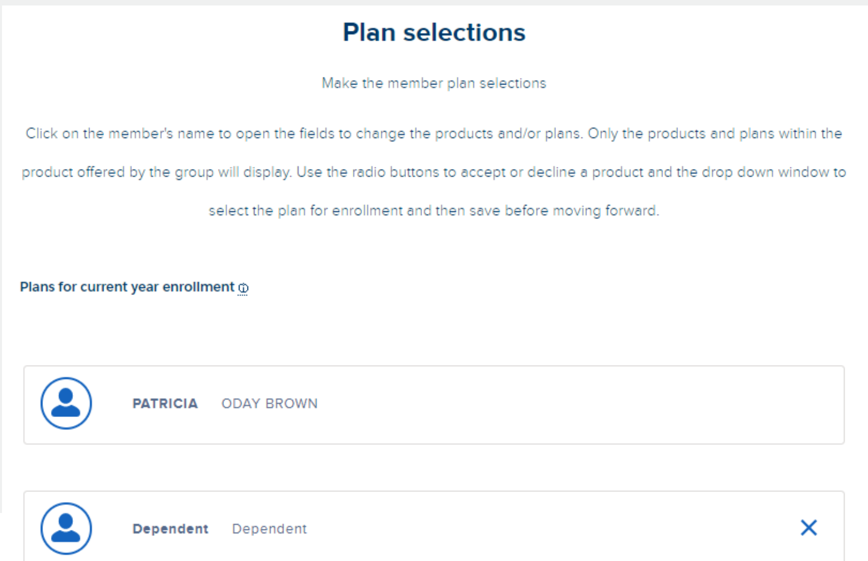
How – This transaction has a two-screen workflow.

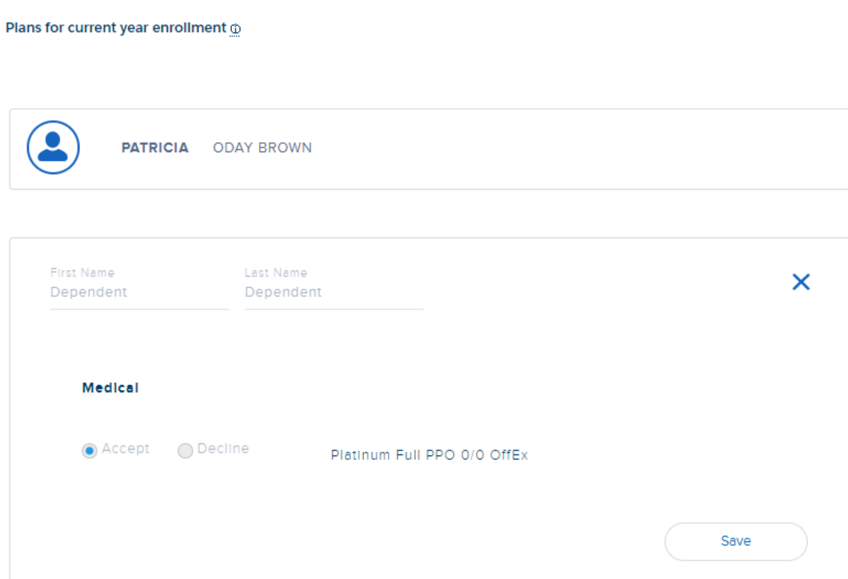
These are the same fields as the EEA form.

1) Enter the enrollment application information by directly typing into the fields.

Add dependent continued

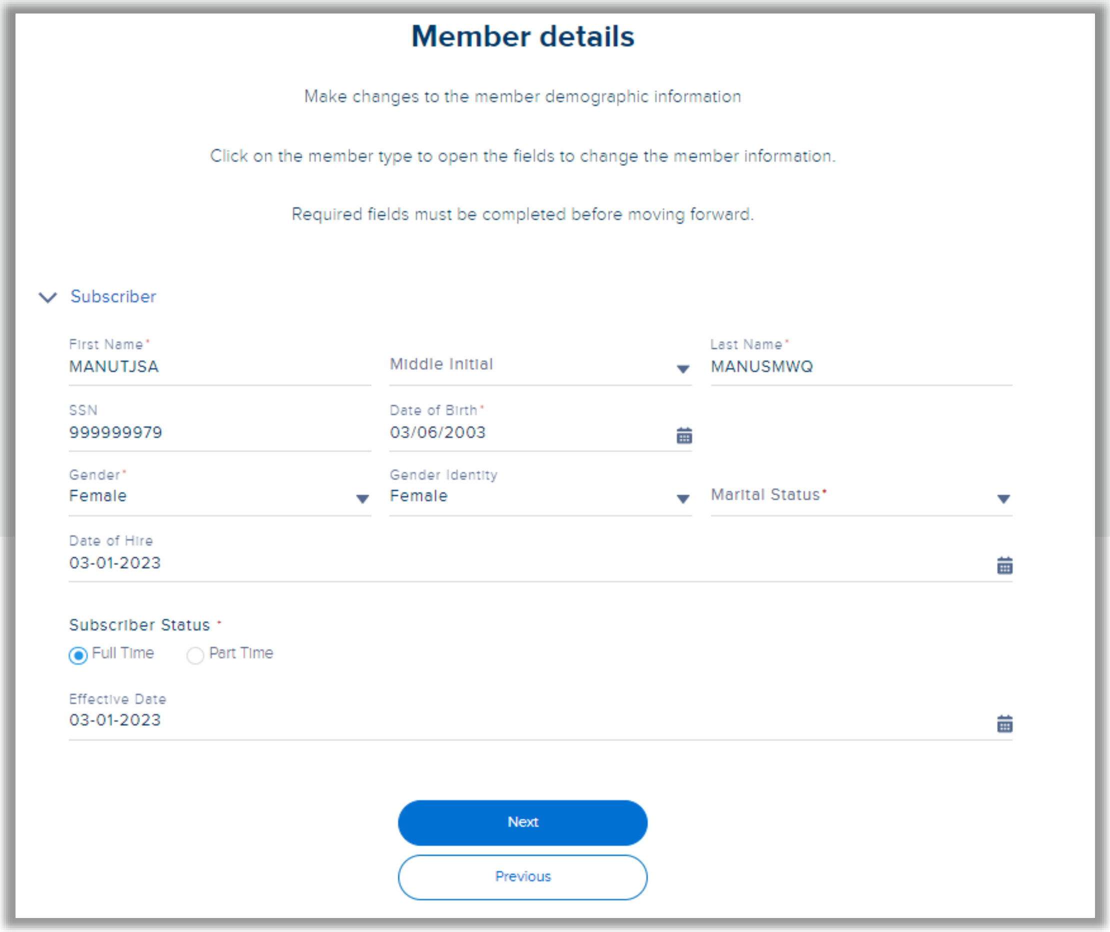
2) Select the plan elections for the dependent based on the subscriber's elections. Click on the save button in the box before clicking Next.





Member details

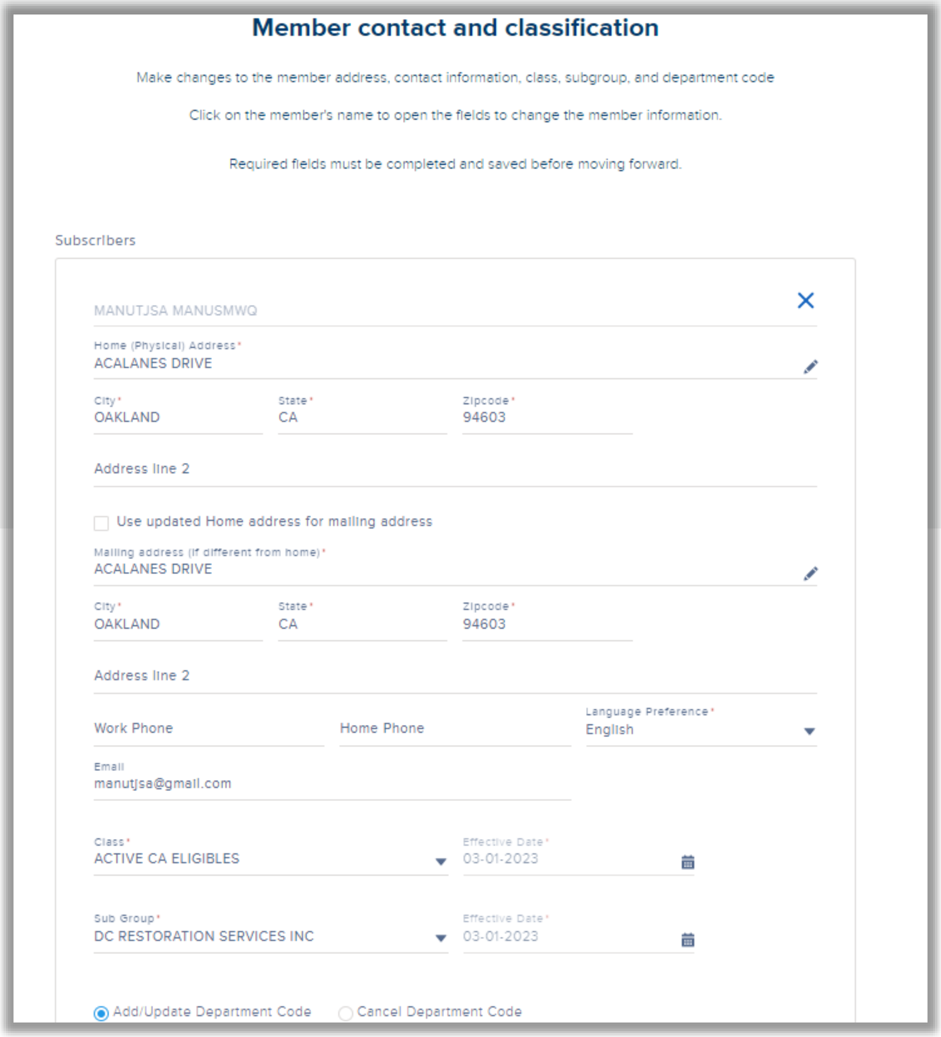
Use for – Update the subscriber and any dependent demographic information (name, DOB, DOH, gender, etc.).



How – Directly type in the new information to the fields. If the subscriber has dependents, use the accordions to expand the dependent fields for updates.

Member contact & classification

Use for – Update the member's contact information, addresses, class and subgroup assignment, and any department code in use.


Member contact and classification

Make changes to the member address, contact information, class, subgroup, and department code

Click on the member's name to open the fields to change the member information.

Required fields must be completed and saved before moving forward.

Subscribers

MANUTJSA MANUSMWQ

Home (Physical) Address*
ACALANES DRIVE

City* OAKLAND
State* CA
Zipcode* 94603

Address line 2

Use updated Home address for mailing address

Mailing address (if different from home)*
ACALANES DRIVE

City* OAKLAND
State* CA
Zipcode* 94603

Address line 2

Work Phone
Home Phone
Language Preference* English

Email
manutjsa@gmail.com

Class* ACTIVE CA ELIGIBLES
Effective Date* 03-01-2023

Sub Group* DC RESTORATION SERVICES INC
Effective Date* 03-01-2023

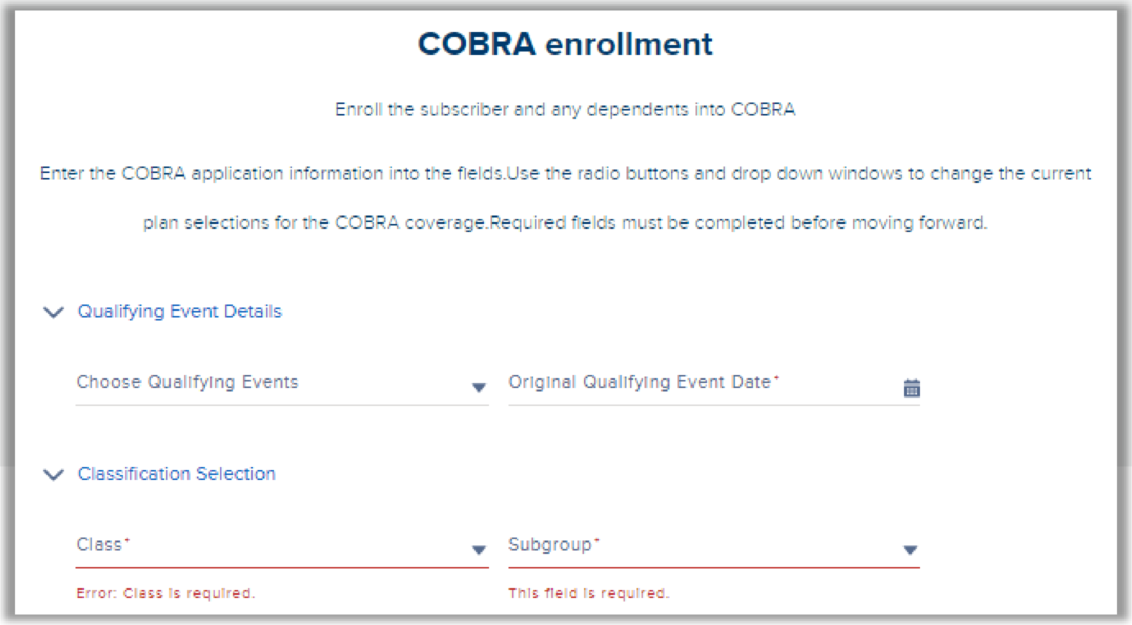
Add/Update Department Code
Cancel Department Code

How – Click on the box with member's name to edit the contact information for that member. Directly type in the new information to the fields. Click on the save button in the box before clicking Next.

Note the Google address lookup will not include second address line and needs to be added manually.

COBRA enrollment

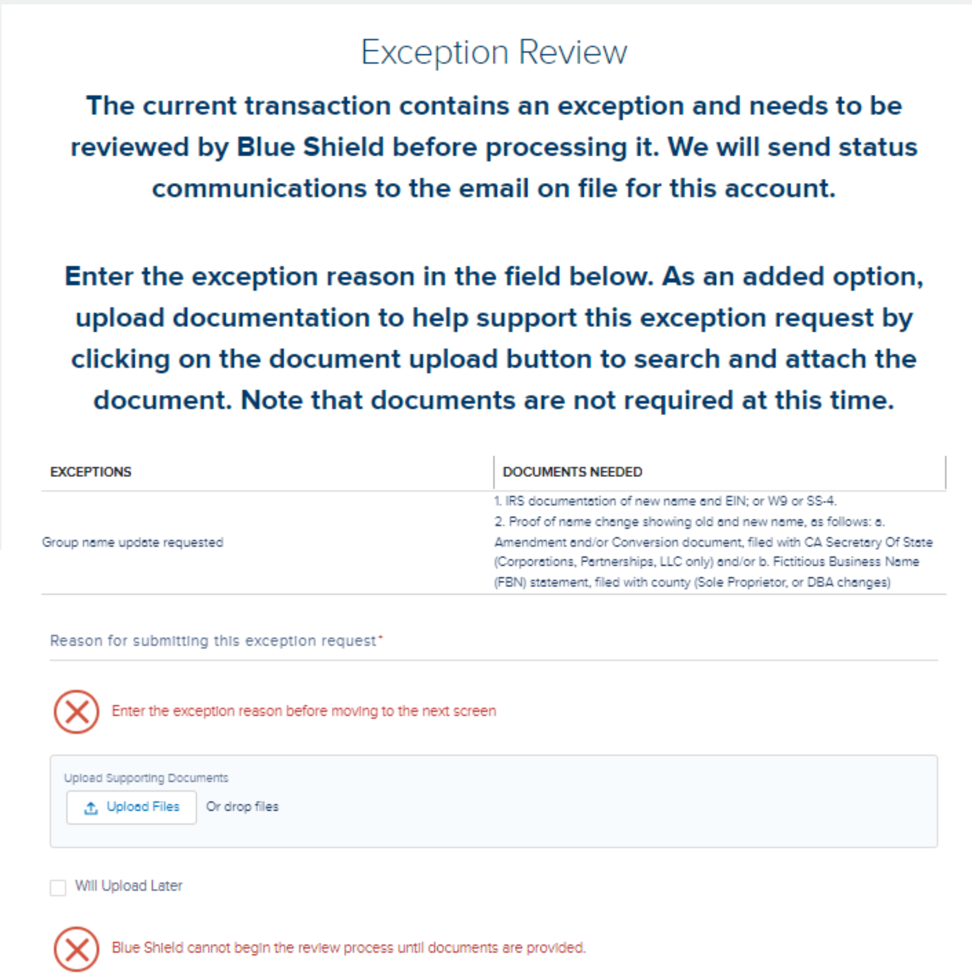
Use for – Enroll an existing subscriber in COBRA.



How – Select the qualifying event, class, and subgroup information. The tool will give the option for plan changes, but this is not a required step.

Exception review

Some transactions require additional documentation.



If a submission requires a document or Blue Shield review, a screen will display in the work flow prompting you for the exact information required.

If you do not have a required document on-hand, use the *Will upload later* check box and click next. It it important to complete the transaction even if the document is provided at a later time.

Uploading documents for exceptions

Some submissions fall under an exception and needs to be reviewed by a Blue Shield team.

The tool will prompt users during the submission if there is an exception. The screen will display what was captured and if any supplemental documents are needed and what those documents are.

Users can upload the requested documents on this screen.

1. Click upload document
2. Select the document from your files
3. Enter an exception comment if desired
4. Click next to submit the transaction with documents

Users can check a box to upload documents later.

1. Check the box will upload later and submit the transaction without documents
2. System generated emails will remind you to upload documents so processing can begin
3. To upload a document, navigate to the tool homepage
4. Click view more on the To Do list panel
5. Click on the maintenance documents required link next to the group's name
6. Click on the blue upload document button in the top right-hand corner
7. The tool will reload the exception document request screen Click
8. upload document
9. Select the document from your files
10. Click save

Manage profiles and record ownership

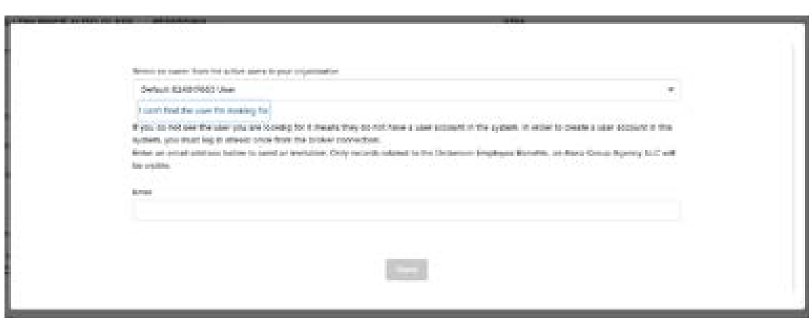
Tool admins have access to view and edit all groups associate to the agency Tax ID.
Admins can also manage ownership of groups among their teams. This keeps the tool in sync with your records of group assignment within your teams.

To change a group's owner, navigate to the group account page.

Scroll down to the bottom of the details section and click on Change Owner.

1)1) Use the dropdown menu to select a new owner from the people associate with the agency Tax ID. Click save.

2) If the desired owner is not listed, click on the link I can't find the users I'm looking for. Follow the instructions on the screen and enter the email address for the new owner. Click send. An email invitation will be sent to the provided address informing of the ownership change.



Again, people must have a valid Broker Connection profile and have clicked on the Shop & Enroll link to access the tool at least once for the ownership change to be effective.