

# Employer Enrollment Tool

## Maintenance guide for employers

Last updated September 25, 2023



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Welcome to  
your new  
tool....

At Blue Shield of California,  
we're dedicated to improving  
the Commercial Market  
experience for our customers.

Which is why we are happy to  
deliver the expanded digital  
capabilities of maintenance to  
the Employer Enroll Tool for  
Small Group and Core lines of  
business.

# Make enrollment changes with confidence with the Employer Enrollment Tool



## Real-time installation

Provider and other  
downstream systems  
will update in their  
normal SLA



## Visibility to your data

Group and member  
account pages make it  
easy to view  
information



## Smart capabilities

Field level validations  
help you avoid typos  
and simple mistakes



## Simple submissions

Guided workflows direct  
you through each step  
of the process

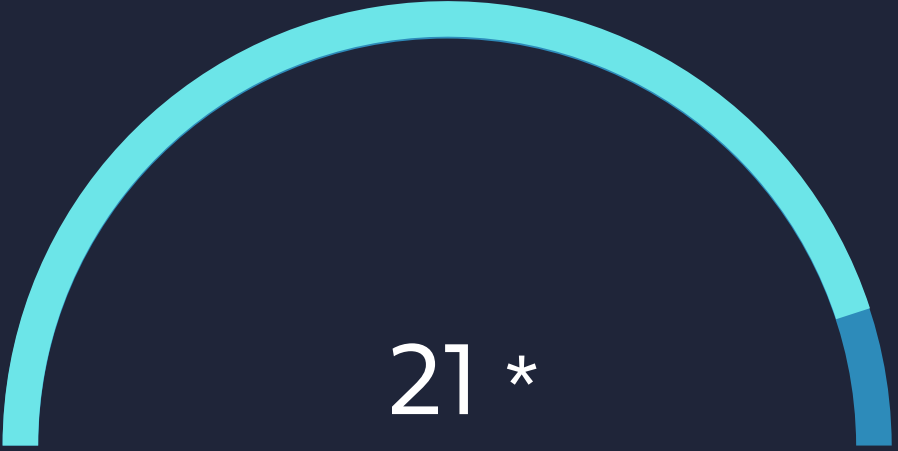
# Experience easy enrollments yourself

Expected installation of  
new hire enrollment



minutes

Features available in  
one tool



\* Large Group employers will have fewer features

Tool submissions with  
self-service status  
tracking



# Tool tips

1

Views default to your recently viewed information. Use the filters My Groups or Agency Book of Business when first accessing company accounts

2

Use the search bar or Manage all Groups action button to access a group record

3

Access to edit group and member information is determined by profile roles set on the portal

4

Use Google Chrome or Microsoft Edge browsers

5

Enter required fields indicated by a red asterisk

6

Enter the name of the person processing the submission for the digital signature

7

Click View all on the To-Do list to see the full list of open tasks

8

Group reinstatement will remain outside of the tool. Please contact Broker and Employer Services to process group reinstatements

# Enrollment tips

1

Open enrollment

Make all of your open enrollment changes in the tool

2

Off-anniversary change  
and exceptions

You can also process changes outside of open enrollment

3

Special Enrollment  
Period (SEP)

Identify the qualifying/ life event in the tool and the tool will offer SEP updates

4

Waivers & refusals

Existing Blue Shield groups do not need to include members refusing coverage

# Eligibility tips

1

## Waiting periods

The tool will automatically implement the selected waiting periods

2

## Member level benefits

Responsive fields will reflect the benefit rules in place

3

## Federal COBRA

Enroll and view Federal COBRA members

4

## Part-time & full-time coverage

Enroll and manage coverage for both levels of employees



# Features

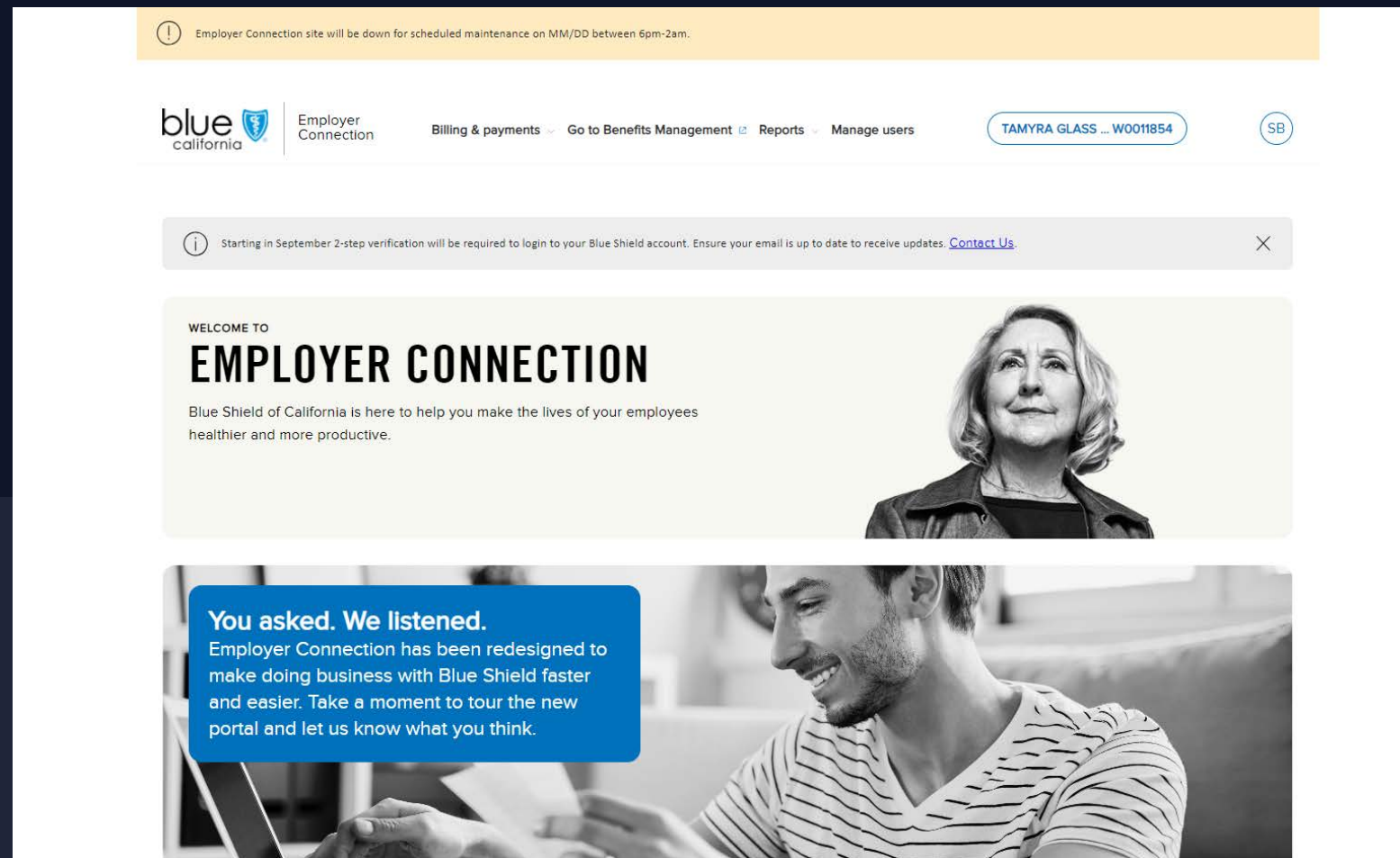
## Group

- Cancel a group
- Enroll employees
- Edit group address and contact information
- Edit group contribution amounts
- Edit group contacts
- Edit bill format
- Edit group name
- Edit group entity information
- Add a group class
- Add a plan or product
- Cancel a plan or product

## Member

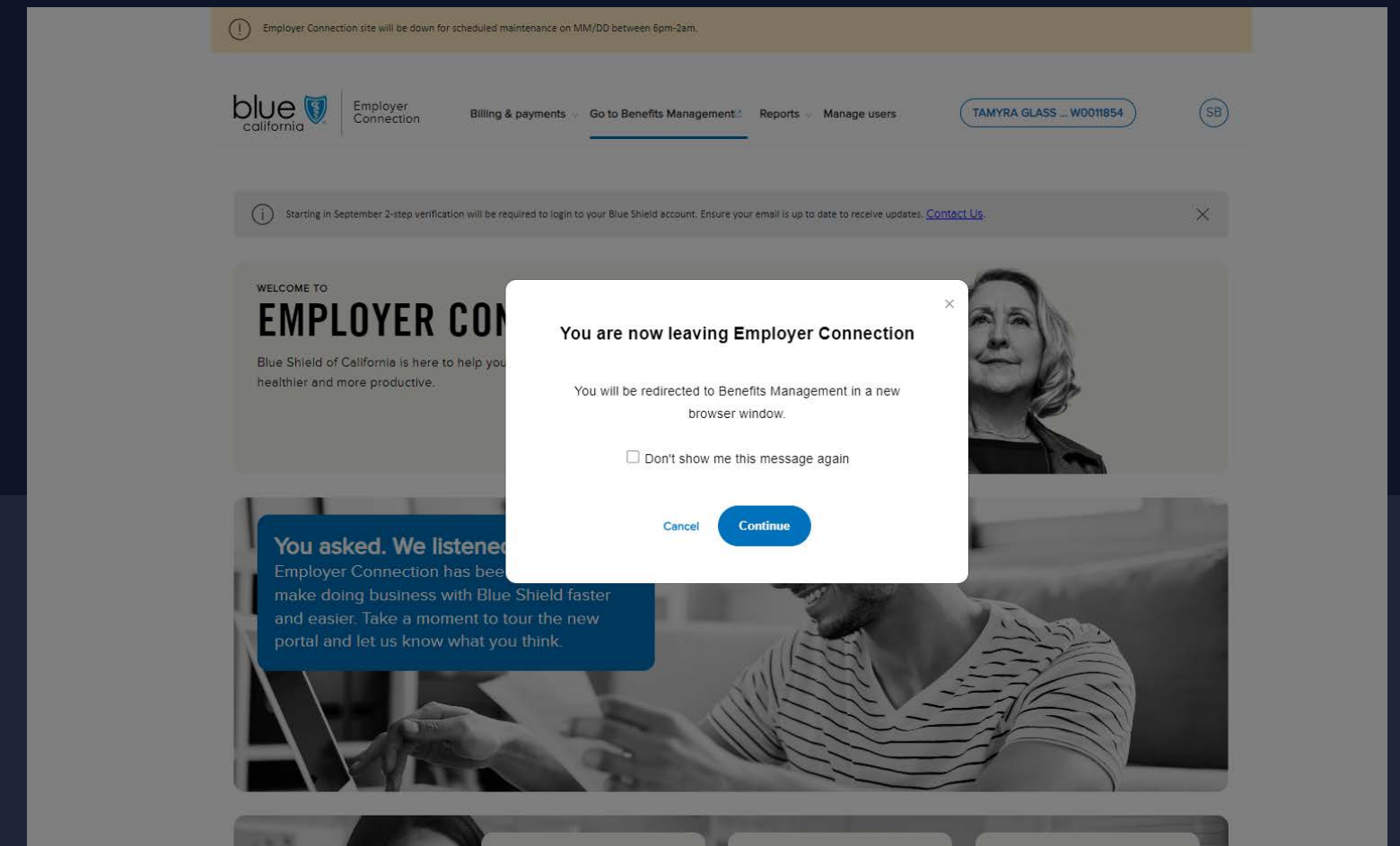
- Cancel a subscriber
- Cancel dependents
- Order ID cards
- Download ID cards
- Edit subscriber and dependent demographics
- Edit contact information
- Edit class, subgroup, department code
- Add a plan or product
- Cancel a plan or product
- Add a dependent
- Enroll in COBRA

# Navigate to the tool



Log into Employer Connection

Use the links on the log in page to reset your password



Click on the benefits management link in the top navigation bar

The button will route you to the Employer Enrollment Tool

# Homepage

Along the top:

- Search bar allows the user to search records they have permission to view, including quotes and enrollments.
- Home returns the user to the Employer Enrollment Tool home page.
- My Groups displays the company account.
- My Reports houses your enrollment reports
- Resources links the broker to User Guide, Tips and Tricks, and a tool resource page with additional information.

Quick Actions:

- 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.

The screenshot shows the Blue Cross of California HR Admin homepage for user 'ADMIN HR'. At the top, there is a search bar and navigation tabs for HOME, MY GROUPS, MY REPORTS, and RESOURCES. A blue banner at the top right contains a message: "New here? Get to know group-level and member-level benefits management on the Employer Enrollment Tool. Register for a training session or access a tool quick guide." Below this is a large image of four people in business attire, with the text "Welcome HR ADMIN!". Underneath the image are three buttons: "Quote a Small Group", "View Small Group Quotes", and "Manage All Groups". The main content area features a "My Account" section with a table of 3 items. The table has columns for Account Name, Facets Gro..., Account..., Busi..., Effective..., and General Agent. The items listed are: 1. SIERRATHERMAL, INC. (W0065616, Customer, Core, 1/1/2023), 2. AUTOMOBIL PVT (W0101934, Customer, ISGBU, 1/1/2023, Word & Brown, Ins), and 3. CLEAR CONSTRUCTION (W0105243, Customer, ISGBU, 4/1/2023, Warner Pacific Ins). Below the table is a "To Do" section with one item: "AUTOMOBIL PVT: Maintenance Documents Required" and a "View More" link.

Account Name	Facets Gro...	Account...	Busi...	Effective...	General Agent
1 SIERRATHERMAL, INC.	W0065616	Customer	Core	1/1/2023	
2 AUTOMOBIL PVT	W0101934	Customer	ISGBU	1/1/2023	Word & Brown, Ins
3 CLEAR CONSTRUCTION	W0105243	Customer	ISGBU	4/1/2023	Warner Pacific Ins

Core

The screenshot shows the Blue Cross of California HR Admin homepage for user 'JANET IGLESIAS'. The layout is identical to the previous screenshot, but the welcome message says "Welcome JANET IGLESIAS!". The "My Account" section shows a table with 1 item. The table has columns for Account Name, Facets Gro..., Account Rec..., Business..., Effective D..., General A..., Writing Producer, and Status. The item listed is: 1. 3E CO. ENVIRONMENTAL, ECOLOGICAL AND ENGINEERING (W8001616, Customer, Core, 6/1/2022, Marsh & McLennan Agency Lic). Below the table is a "To Do" section with a "View More" link.

Account Name	Facets Gro...	Account Rec...	Business...	Effective D...	General A...	Writing Producer	Status
1 3E CO. ENVIRONMENTAL, ECOLOGICAL AND ENGINEERING	W8001616	Customer	Core	6/1/2022		Marsh & McLennan Agency Lic	

# Group level changes

Remember group features are  
available by line of business



# Group account

To begin a maintenance record change, select your company. Click on the blue account name to open the account record page.

The account record page displays information regarding to your company.

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.

# Group account continued

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

Edit Group button 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.

The screenshot shows the Blue California Group Account Management interface. At the top, there is a search bar and a user profile for ADMIN HR. The main navigation bar includes HOME, MY GROUPS, MY REPORTS, and RESOURCES. On the right side, there are buttons for Cancel Group, Enroll Employee, and Edit Group. Below this, the account name CLEAR CONSTRUCTION is displayed with a + Follow button. A summary table shows the following data:

Group ID	Status	Business Unit	No of Employees	Cancel Date	Account Payment Status
W0105243	Enrolled	ISGBU	7	12/31/2999	Current

Below the summary table, there are several expandable sections for detailed information:

- EMPLOYER INFORMATION** (selected):
  - Account Information:

Account Name	Tax ID	Effective Date	Doing Business As Name	SIC Code
CLEAR CONSTRUCTION	823613035	2019-04-01		1521
  - Address Information:
    - Principal Address
    - Billing Address
  - Waiting Period:

Class Code	Class	Waiting Period	Effective Date
1000	ACTIVE CA ELIGIBLES		2023-04-01
- MEMBER ROSTER
- ENROLLMENT CONTRACTS
- QUOTES COMPLETED
- QUOTES IN PROGRESS
- EMPLOYER CONTACTS
- PLANS
- PAYMENT
- MORE

# Group level 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 Group

- Enroll Employees
- Group details
- Group contacts
- Group plans
- Class plans
- Group name and structure changes
- Contribution amounts
- Eligibility offerings
- Billing format
- Cancel group

## Large Group/ Core

- Enroll Employees
- Group details
- Group contacts
- Cancel group

# Enroll employees

Use for – Enrolling new employees and their dependents

How – This transaction has a two-screen workflow. First, enter in the enrolling employee's information. This is the same information captured on the Employee Enrollment Application (EEA) form.

### Enroll a member

Enter the subscriber application information into the fields.

Required fields must be completed before moving forward.

▼ Qualifying Event Details

Qualifying Event\* ▼ Qualifying Event Date\* 📅

Are you a Full-Time or Part-Time Employee? \*

Full-Time  Part-Time

Effective Date 📅

The effective date does not reflect the group's waiting period calculations. If a waiting period applies, the effective date will be recalculated once it is received for processing.

> Demographics  
Please expand to fix all invalid fields.

> Subscriber Details  
Please expand to fix all invalid fields.

> Other Health Plan Information  
Please expand to fix all invalid fields.



# Enroll employees continued

Next, select the plan election for the member(s). Click on the boxes to open up the product and plan fields.

Use the toggle buttons to accept or decline the products offered by your company. Then use the dropdown menu to select the member's plan from the available plans offered. Click the Save button before moving on.

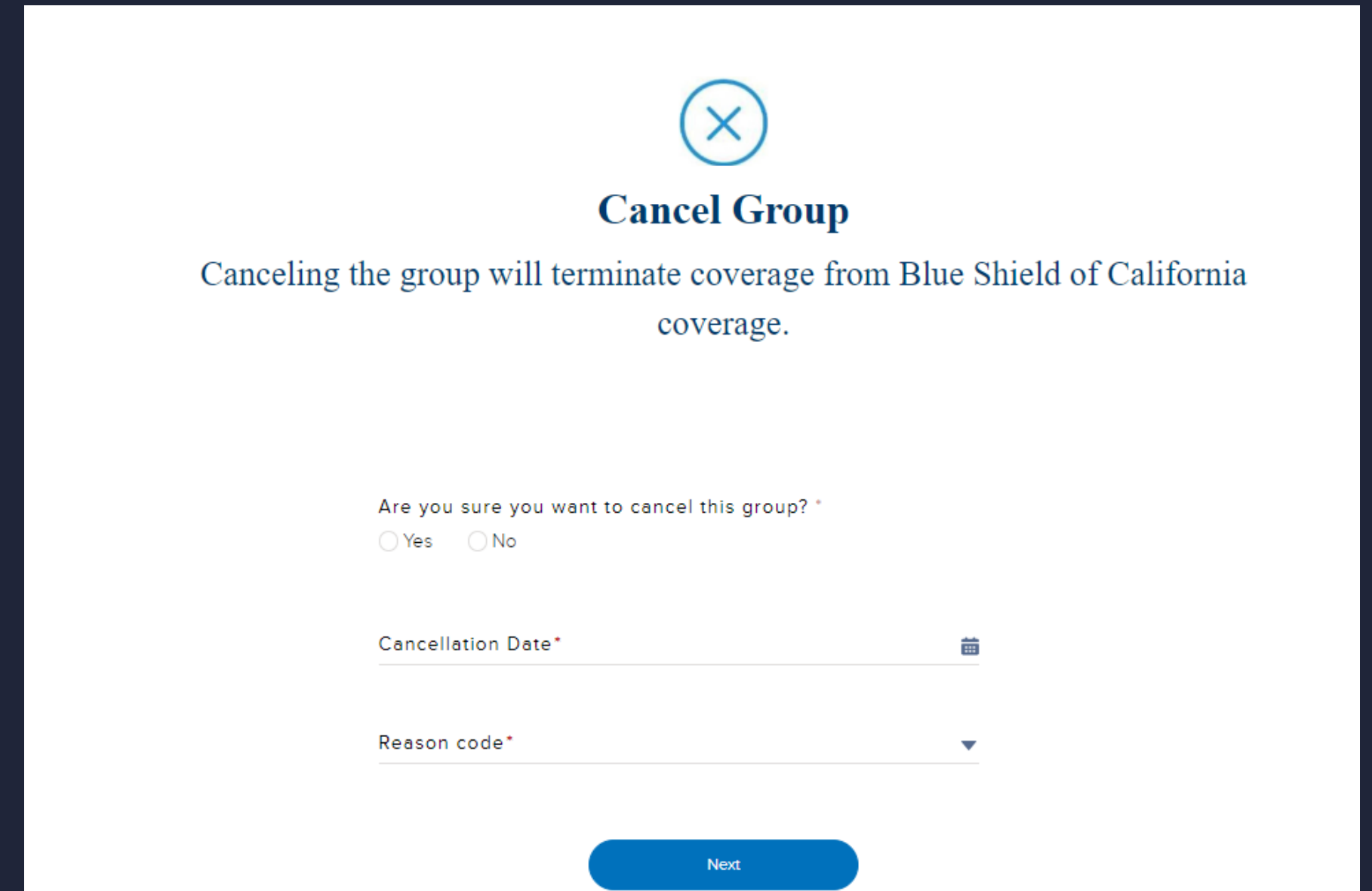
The screenshot shows a progress bar at the top with three steps. The second step, 'Plan Selection', is active and highlighted with a blue circle. Below the progress bar is a blue icon of a document with a checkmark. The main heading is 'Plan selections' in bold. Below it is the instruction 'Make the member plan selections'. A paragraph of text explains that clicking on a member's name opens fields to change products and plans, and that radio buttons and a dropdown menu are used to select a plan. Below this is a section titled 'Plans for current year enrollment @'. A red-bordered box highlights a member's name field, which contains a person icon, the text 'employee', and a placeholder 'name'. At the bottom of the page are three buttons: 'Next' (solid blue), 'Previous' (white with blue border), and 'Cancel' (white with blue border).

This screenshot shows a modal window titled 'Plans for current year enrollment @'. At the top, it repeats the instruction from the previous screen: 'product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.' Below this is a form with two input fields: 'First Name employee' and 'Last Name name'. Underneath is a section titled 'Medical' with two radio buttons: 'Accept' and 'Decline'. A red error message with an 'X' icon says 'Please select at least one plan to continue.' At the bottom right is a 'Save' button.

# Group cancellation

Use for – canceling a company's Blue Shield coverage.

How – Confirm the intention to cancel coverage. Then provide the cancellation date and reason so ended your Blue Shield coverage.




The screenshot shows a web form titled "Cancel Group" with a blue 'X' icon in a circle at the top. Below the title is a warning message: "Canceling the group will terminate coverage from Blue Shield of California coverage." The form contains three main sections: a confirmation question "Are you sure you want to cancel this group?\*" with radio buttons for "Yes" and "No"; a "Cancellation Date\*" field with a calendar icon; and a "Reason code\*" field with a dropdown arrow. At the bottom is a blue "Next" button.


**Cancel Group**

Canceling the group will terminate coverage from Blue Shield of California coverage.

Are you sure you want to cancel this group? \*

Yes  No

Cancellation Date\* 

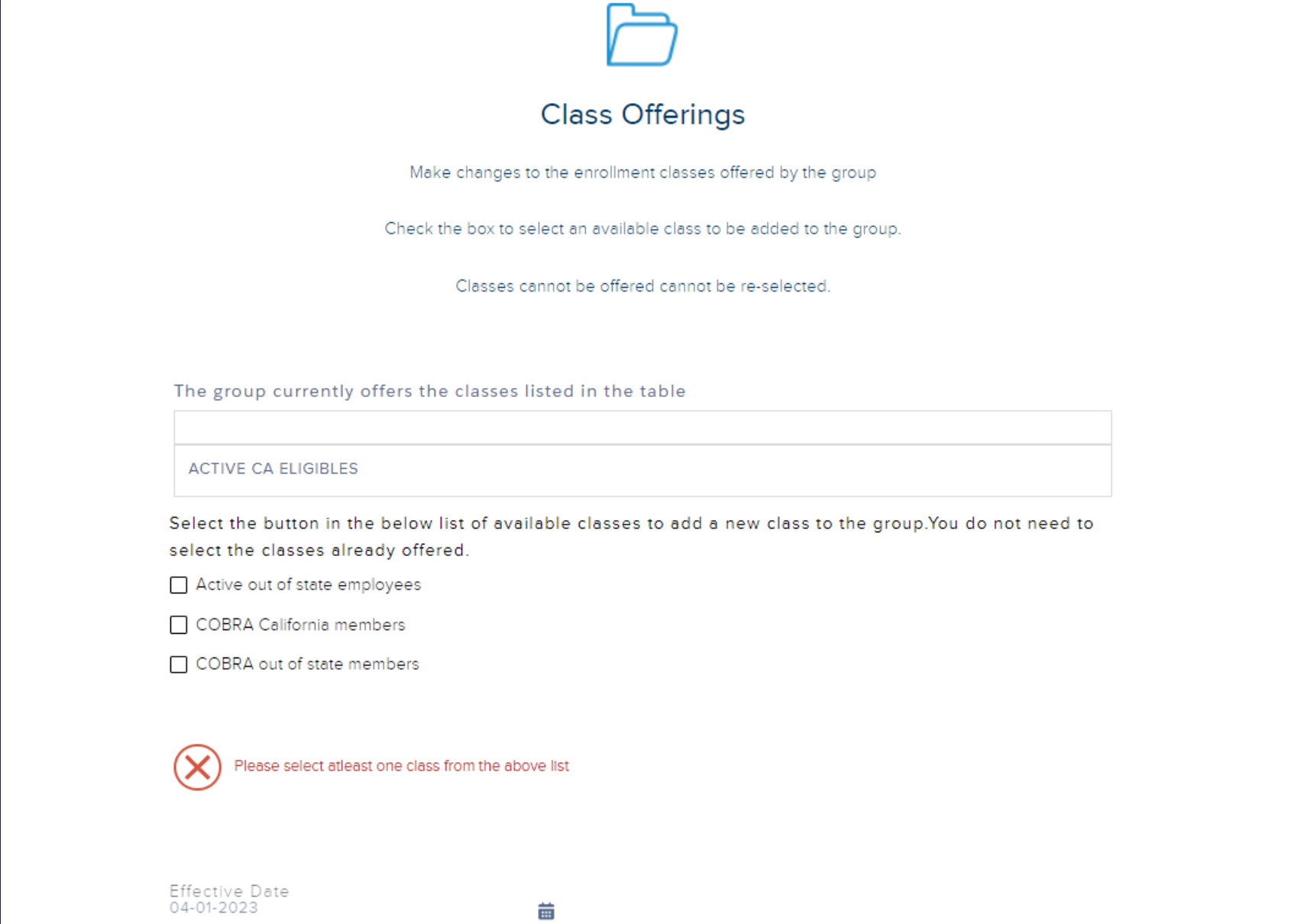
Reason code\* 

Next


# 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.



The screenshot shows a web interface for managing class offerings. At the top, there is a folder icon and the title "Class Offerings". Below the title, there are instructions: "Make changes to the enrollment classes offered by the group" and "Check the box to select an available class to be added to the group." A note states "Classes cannot be offered cannot be re-selected." Below this, a table shows the current offerings, with one row labeled "ACTIVE CA ELIGIBLES". Underneath the table, there are three radio button options: "Active out of state employees", "COBRA California members", and "COBRA out of state members". A red error message with a crossed-out circle icon says "Please select atleast one class from the above list". At the bottom, there is an "Effective Date" field showing "04-01-2023" and a calendar icon.

 **Class Offerings**

Make changes to the enrollment classes offered by the group

Check the box to select an available class to be added to the group.

Classes cannot be offered cannot be re-selected.

The group currently offers the classes listed in the table


ACTIVE CA ELIGIBLES
---------------------


Select the button in the below list of available classes to add a new class to the group. You do not need to select the classes already offered.

Active out of state employees

COBRA California members

COBRA out of state members

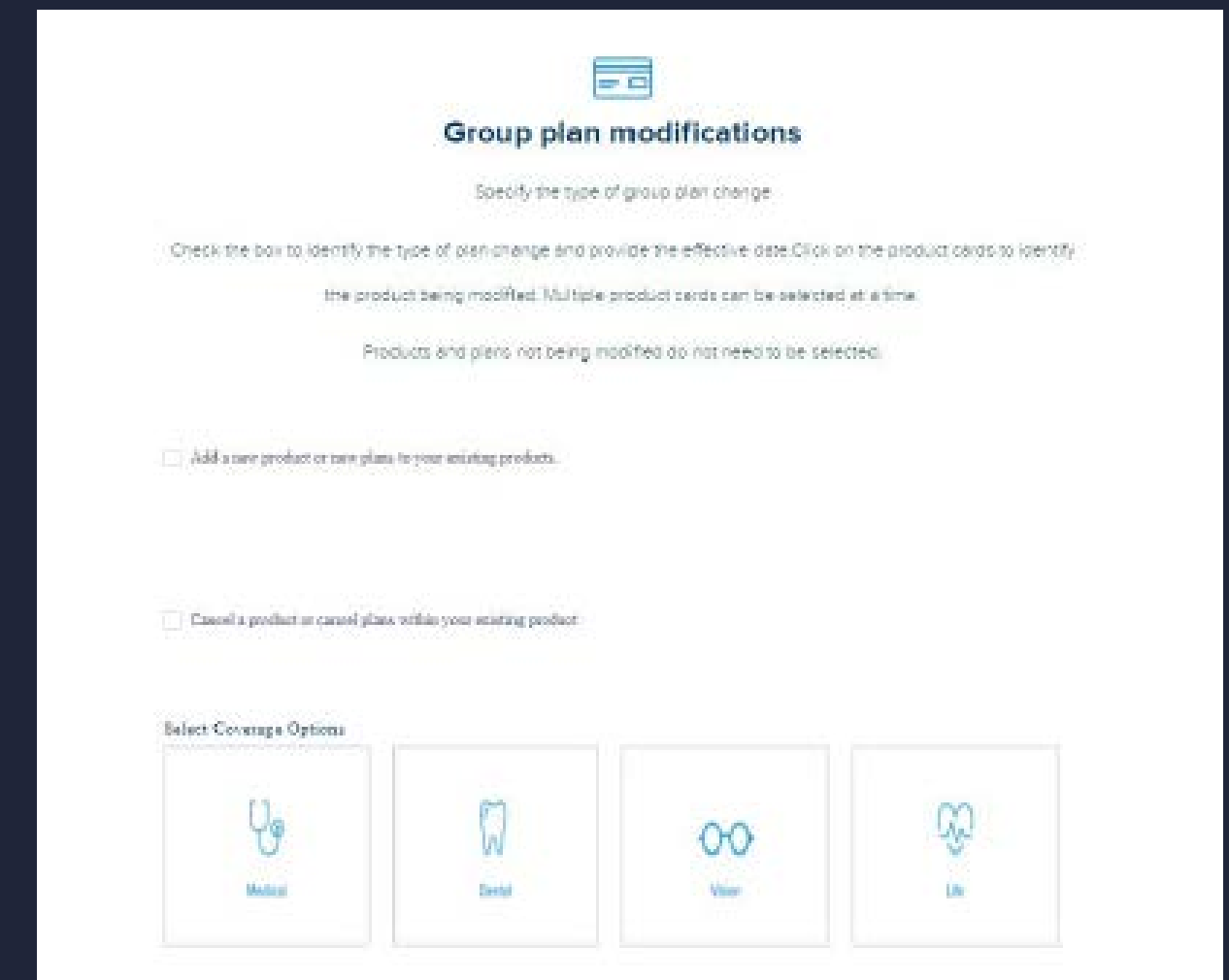
 Please select atleast one class from the above list

Effective Date  
04-01-2023 

# 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.



The screenshot shows a web-based interface for "Group plan modifications". At the top, there is a blue icon of a document with a checkmark, followed by the title "Group plan modifications" and the instruction "Specify the type of group plan change". Below this, there is a paragraph of text: "Check the box to identify the type of plan change and provide the effective date. Click on the product cards to identify the product being modified. Multiple product cards can be selected at a time. Products and plans not being modified do not need to be selected." There are two checkboxes: the first is "Add a new product or new plans to your existing products." and the second is "Cancel a product or cancel plans within your existing product." Below these is a section titled "Select Coverage Options" with four cards: "Medical" (with a stethoscope icon), "Dental" (with a tooth icon), "Vision" (with glasses icon), and "Life" (with a heart icon).



# Group plan changes continued

## Add a plan or product

- 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.

The screenshot shows a web interface for selecting medical coverage. At the top, there is a medical cross icon and the title "Select Medical Coverage". Below the title, there is a sub-header "Note the group plan selections" and a paragraph of instructions: "To select plan, select the plan package or product, view the networks and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the plus/minus icon in the current plan table. Select and use the arrows to indicate the plan being over the current plan table." Below this, there is a "Current Plan" dropdown menu with a list of options: "Gold Trio HMO 000/00 OEBE", "Gold Trio HMO 100/00 OEBE", "Gold Trio HMO 300/00 OEBE", "Platinum PPO 000/00 OEBE", and "Platinum PPO 000/00 OEBE". Below the dropdown is a "Select Plan Package" section with two buttons: "All Products" and "None". Below that is a "Network" section with several checkboxes: "Trio ACO HMO", "Trio HMO", "Accor HMO", "PPO HMO", and "Local Accor HMO". Below the network section are two buttons: "Select All" and "Deselect All". At the bottom, there are two expandable sections: "Trio ACO HMO" and "Trio HMO". The "Trio ACO HMO" section has two checkboxes: "Silver Trio ACO HMO 000/00 OEBE" and "Bronze Trio ACO HMO 000/00 OEBE". The "Trio HMO" section has four checkboxes: "Platinum Trio HMO 000/00 OEBE", "Gold Trio HMO 000/00 OEBE", "Silver Trio HMO 000/00 OEBE", and "Bronze Trio HMO 000/00 OEBE".

# Group plan changes continued

## Cancel a plan or product

- 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.

**Select Medical Coverage**  
Make the group plan selections

To add a plan, select the plan package or option to view the network and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the blue cancel link in the current plan label below, and use the arrow to move the plan name into the canceled plan label.

**Current Plan**

- Gold Tier (HMO) 1000/10-0000
- Gold Tier (HMO) 1000/20-0000
- Bronze Plus PPO 010-0000
- Bronze Plus PPO 010-0000

**Canceled Plan**

- Gold Tier (HMO) 1000/10-0000

**Select Plan Package**

**Network**

This ACCO HMO  Access HMO  Local Access HMO

Bronze PPO  Full PPO

**This ACCO HMO**

- Silver Tier (HMO) 1100/10-0000
- Bronze Tier (HMO) 1000/10-0000

**Bronze PPO**

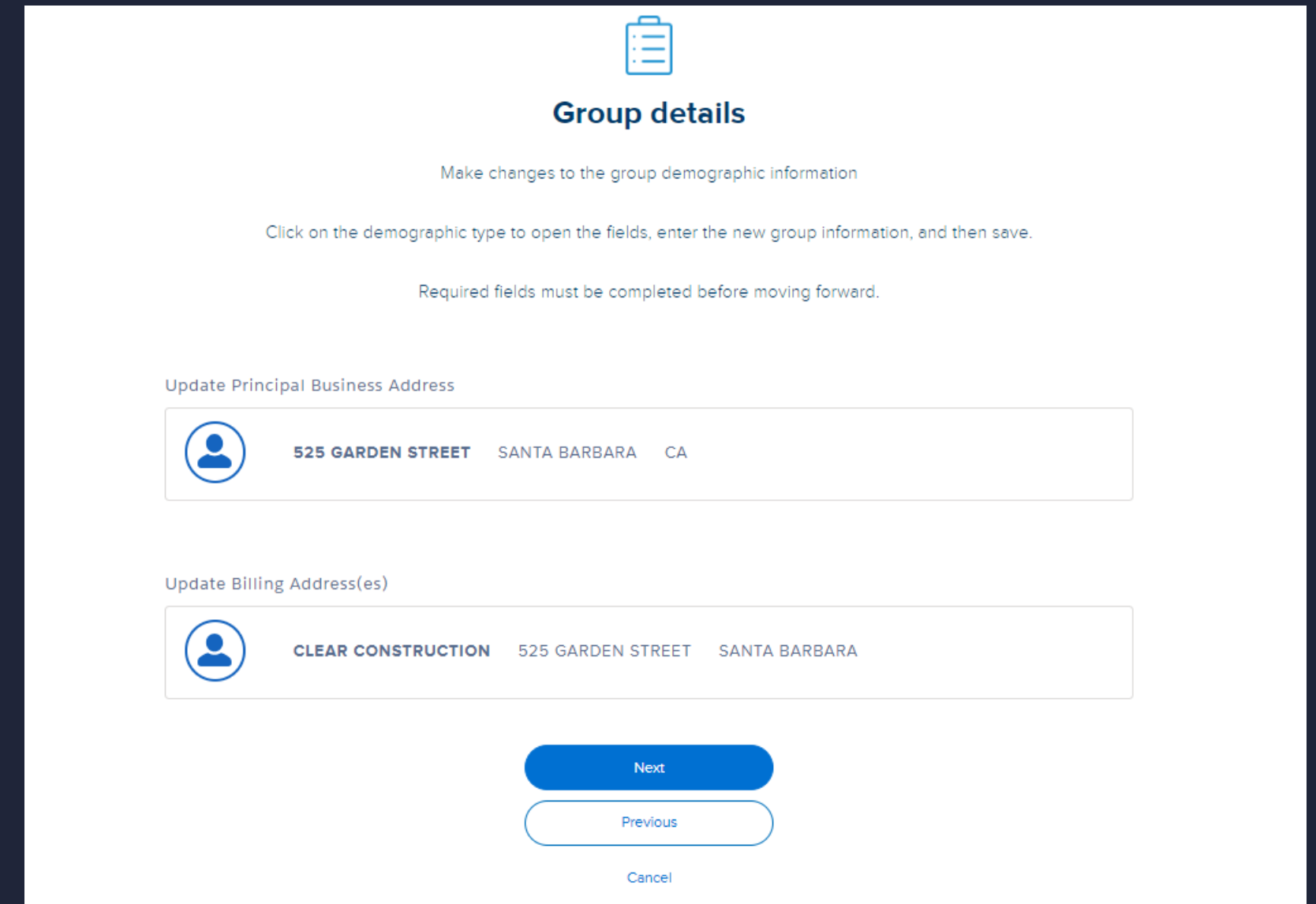
- Premium Bronze PPO 1100/10-0000
- Gold Tier Plus PPO Savings 1110 (1% 1000) 1000/10-0000
- Silver Tier Plus PPO 1110/10-0000
- Bronze Tier Plus PPO 1000/10-0000
- Bronze Tier Plus PPO 1000/10-0000

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.



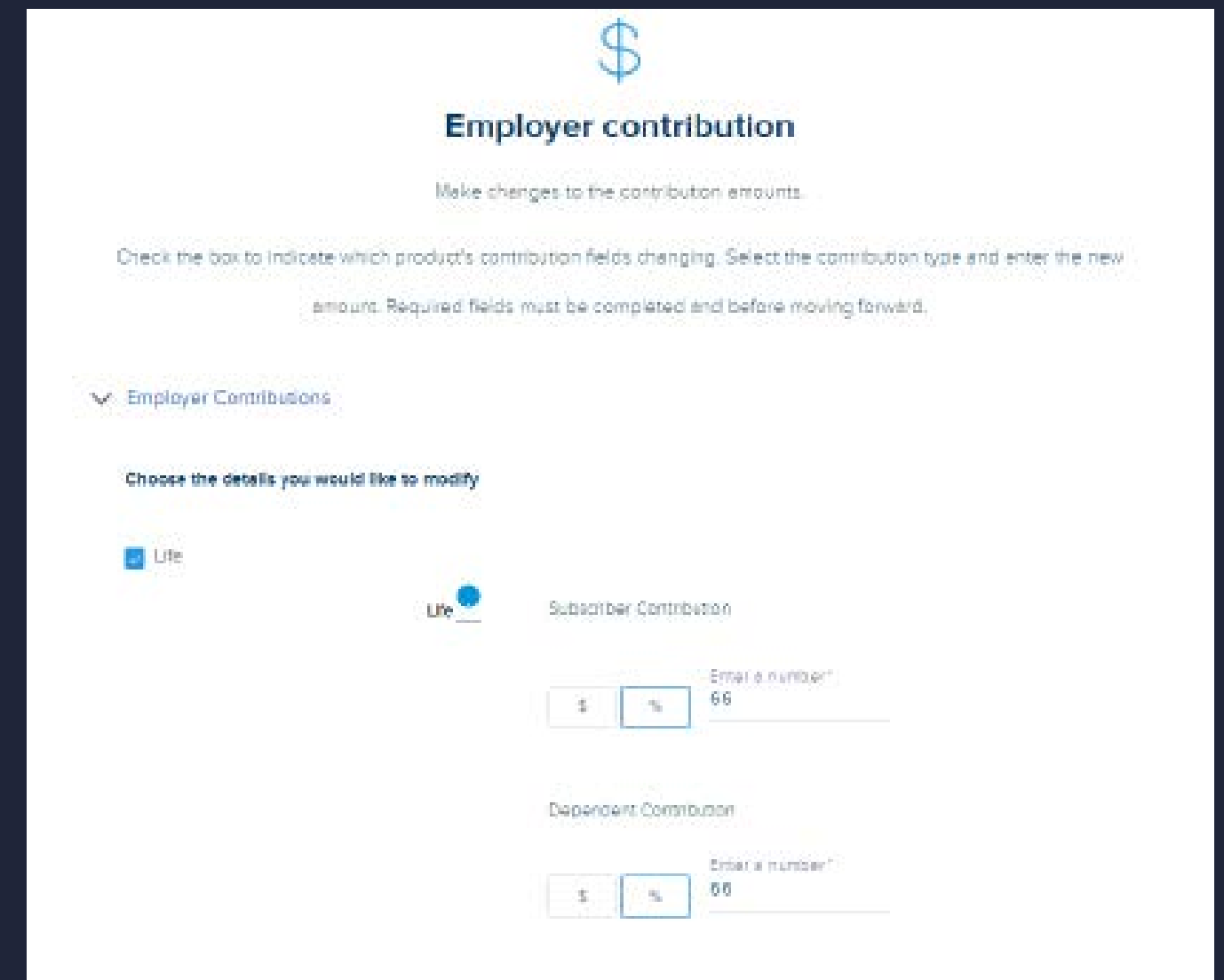
The screenshot shows a web interface for updating group details. At the top, there is a clipboard icon and the title "Group details". Below the title, there are three lines of instructional text: "Make changes to the group demographic information", "Click on the demographic type to open the fields, enter the new group information, and then save.", and "Required fields must be completed before moving forward." The form contains two main sections: "Update Principal Business Address" and "Update Billing Address(es)". Each section has a card with a person icon, a text input field, and a save button. The "Update Principal Business Address" card shows the address "525 GARDEN STREET SANTA BARBARA CA". The "Update Billing Address(es)" card shows the address "CLEAR CONSTRUCTION 525 GARDEN STREET SANTA BARBARA". At the bottom of the form, there are three buttons: "Next" (a solid blue button), "Previous" (a white button with a blue border), and "Cancel" (a small blue text link).

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.



The screenshot shows a web interface for managing employer contributions. At the top, there is a blue dollar sign icon and the heading "Employer contribution". Below this, a subtitle reads "Make changes to the contribution amounts". A note states: "Check the box to indicate which product's contribution fields changing. Select the contribution type and enter the new amount. Required fields must be completed and before moving forward." A section titled "Employer Contributions" is expanded, showing a list of products. The "Life" product is selected with a blue checkbox. Underneath, there are two sections: "Subscriber Contribution" and "Dependent Contribution". Each section has a "Subscriber Contribution" label, a "Life" icon, and two input fields: one for a dollar amount (with a "\$" icon) and one for a percentage (with a "%" icon). The "Subscriber Contribution" fields have "66" entered in the percentage field. The "Dependent Contribution" fields have "00" entered in the percentage field. A "Submit" button is visible at the bottom right.



# Structure change

Use for – Small Group only. Update the group's name and/or legal entity type information.

How – Enter in the new information into the respective fields. Use the check box to indicate the level of changes being submitted.

### Update Business Name

Enter only the information that is changing into the corresponding fields.  
Use the checkbox to select the type of structure change.

New Group Legal Name  New Federal Tax ID (TID) number

New Doing business as (DBA)


New Standard Industry Classification (SIC) and Industry description

New Legal Entity Type

▼ Select the type of change(s) requested:

Simple Name Change

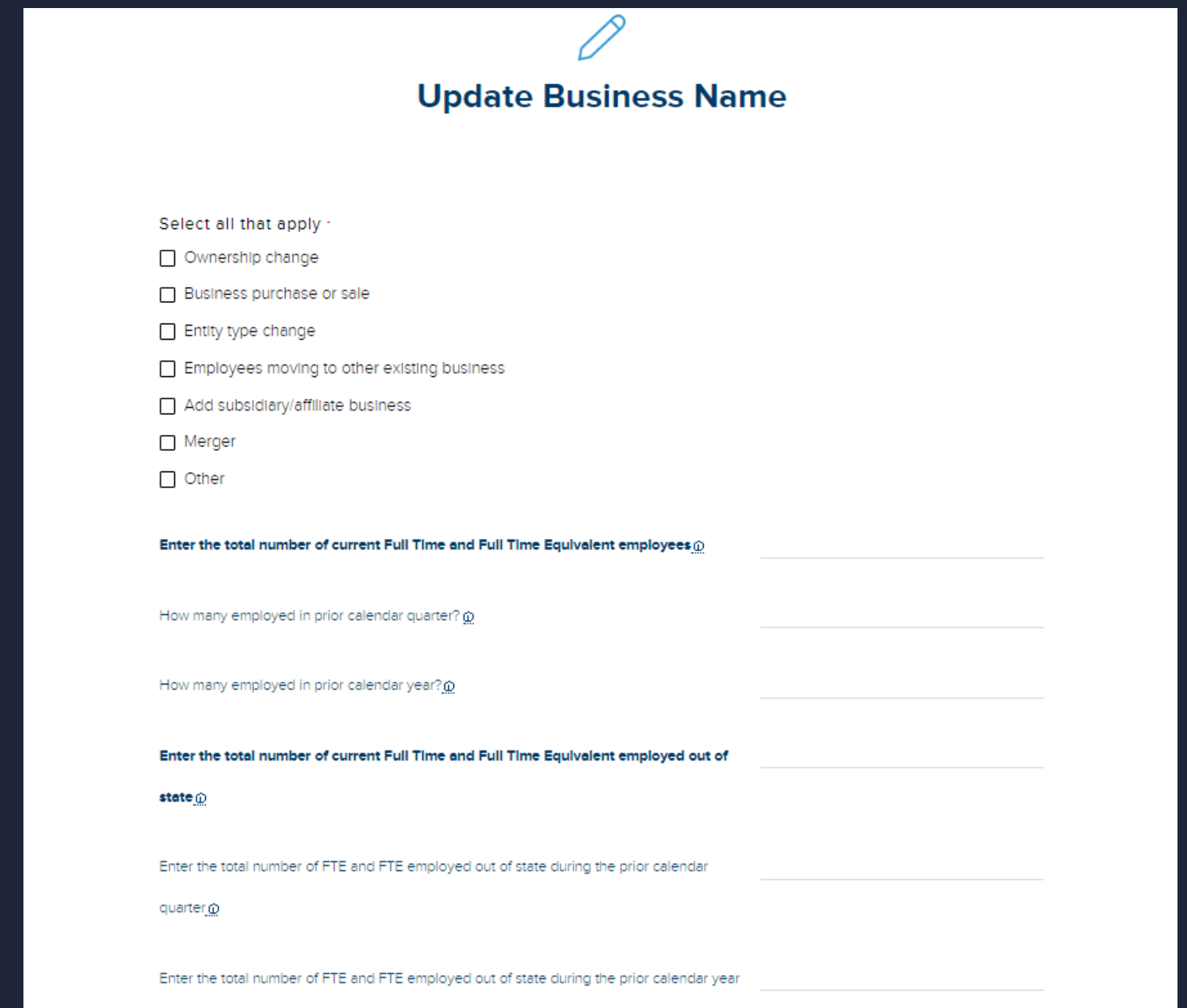
Comprehensive Business Change

 Please select the type of change(s) requested

# Structure change - complex

Use for – Small Group only. Update multiple business entity criteria.

How – Check the box next to the type of change. Select multiple boxes for many changes.



The form is titled "Update Business Name" with a pencil icon above the title. It contains a section for selecting the type of change, followed by several input fields for employee counts.

**Update Business Name**

Select all that apply

- Ownership change
- Business purchase or sale
- Entity type change
- Employees moving to other existing business
- Add subsidiary/affiliate business
- Merger
- Other

Enter the total number of current Full Time and Full Time Equivalent employees @ \_\_\_\_\_

How many employed in prior calendar quarter? @ \_\_\_\_\_

How many employed in prior calendar year? @ \_\_\_\_\_

Enter the total number of current Full Time and Full Time Equivalent employed out of state @ \_\_\_\_\_

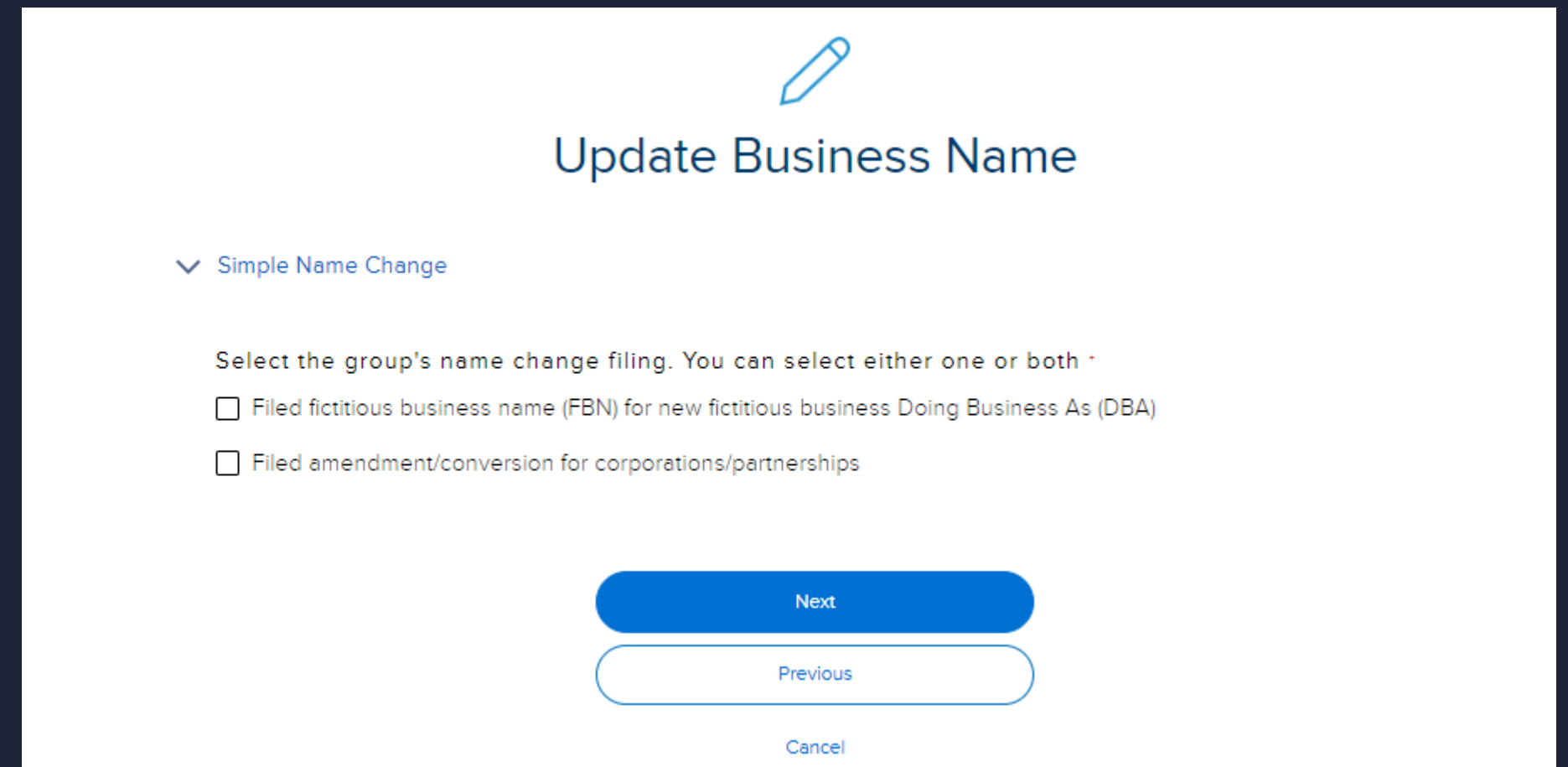
Enter the total number of FTE and FTE employed out of state during the prior calendar quarter @ \_\_\_\_\_

Enter the total number of FTE and FTE employed out of state during the prior calendar year \_\_\_\_\_

# Structure change - simple

Use for – Small Group only. Update the group's name and/or legal entity type.

How – Check the box next to the type of change.



The screenshot shows a web interface for updating a business name. At the top center is a pencil icon. Below it is the title "Update Business Name". Underneath is a dropdown menu labeled "Simple Name Change" with a downward arrow. Below the dropdown is a text instruction: "Select the group's name change filing. You can select either one or both". There are two checkboxes: the first is "Filed fictitious business name (FBN) for new fictitious business Doing Business As (DBA)" and the second is "Filed amendment/conversion for corporations/partnerships". At the bottom are three buttons: "Next" (a solid blue button), "Previous" (a white button with a blue border), and "Cancel" (a small text link).

# Billing attribute

Use for – Small Group only. Update the layout of the bill.

How – Use the toggle button to select the standard bill layout or the department code layout that organizes members by their department code.



## Modify Billing Information

Organize how each premium statement ID appears on the bill. Use the toggle buttons to select the desired bill layout.

Premium Statement Print Id

CLEAR CONSTRUCTION  Standard Bill  Sort by Department Code  ×

Save

Next

Previous

Cancel



# Member level changes





# 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 employees. Select an employee from the roster by clicking on the name.

HOME MY GROUPS MY REPORTS RESOURCES

Cancel Group End Employer End Group

ACCOUNT: MARCH03GRP05 [Follow](#)

GROUP: WTC0407 Status: Cancelled SUBMASTER: 0000 NO OF EMPLOYEES: 2 COPM DTM: 10/21/2009 ACCOUNT PAYMENT: BILL

EMPLOYEE INFORMATION **MEMBER ROSTER** ENROLLMENT CONTRACTS QUOTES COMPLETED QUOTES IN PROGRESS EMPLOYEE CONTRACTS PLANS PAYMENT MORE

Roster is limited to 100 rows. Use search and filter options to quickly find members. Download the roster to view all subscriber and dependent information. [Download to CSV](#)

Search:  Status:  Effective Date:

	Member Name	Member ID	Birth Date	Status	Effective Date	Benefit Begin Date	Benefit End Date
1	<a href="#">SURE SUB1</a>	F114206	03/01/1994	Cancelled	03/01/2021	03/01/2021	03/01/2021
2	<a href="#">SURE SUB2</a>	F114207	03/01/1994	Active	03/01/2021	03/01/2021	03/01/2021
3	<a href="#">ACTAL SUB1</a>	F114054	03/01/1990	Active	03/01/2021	03/01/2021	03/01/2021
4	<a href="#">JI (JLAD)</a>	F114054	03/01/1990	Active	03/01/2021	03/01/2021	03/01/2021

[Privacy Policy](#) | [Report Fraud & Abuse](#) | [Legal/Disclaimer](#) | [Contact](#) | [Notification notice](#) | [Language options](#) | [Cookies](#)

# member account

Like the group account page, the member account page holds all of the valuable enrollment information for the selected person.

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

The screenshot shows a member account page for Miguel Torres. At the top right, there are four buttons: "Go back to group", "ID Card", "Cancel member", and "Edit Subscriber". Below these buttons, the member's name "MIGUEL TORRES" is displayed next to a blue square icon. Underneath, there are three columns of information: "Subscriber Id" (909338975), "Group" (CLEAR CONSTRUCTION), and "Status" (Active). A horizontal line separates this header from a navigation menu with tabs for "DETAILS", "PLANS", "DEPENDENTS", "TRANSACTION HISTORY", and "PRIMARY CARE PROVIDER". The "DETAILS" tab is selected. Below the navigation menu, there are three expandable sections: "Subscriber Information", "Address Information", and "Contact Information". The "Subscriber Information" section is expanded, showing fields for First Name (MIGUEL), Last Name (TORRES), Middle Initial, Date Of Birth (09-07-1989), Age (34), Gender (Male), Date Of Hire (07-29-2019), Original Effective Date (2019-10-01), and SSN (615431172). The "Address Information" section is also expanded, showing Home Street Address (304 W ROBERT AVE), Address Line 2, City (OXNARD), State (CA), and Zip (93030). The "Contact Information" section is collapsed.

Subscriber Id	Group	Status
909338975	CLEAR CONSTRUCTION	Active

Member  
MIGUEL TORRES

Subscriber Information

First Name	MIGUEL	Date Of Birth	09-07-1989
Last Name	TORRES	Age	34
Middle Initial		Gender	Male
Date Of Hire	07-29-2019	SSN	615431172
Original Effective Date	2019-10-01		

Address Information

Home Street Address	Address Line 2	City	State	Zip
304 W ROBERT AVE		OXNARD	CA	93030
Mailing Street Address	Address Line 2	City	State	Zip
304 W ROBERT AVE		OXNARD	CA	93030

Contact Information

# Member level 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.



All

- Cancel member
- Reinstatement member
- Order ID card
- Download ID card
- Member demographics
- Member contact
- Member plans
- Add dependent(s)
- COBRA enrollments
- Dependent  
cancellation/reinstatement

# Member cancelation

Use for – Canceling an employee's Blue Shield coverage. If the employee has dependents this will also cancel their coverage.

How - Click on the cancel member button on the member account page. Provide the cancelation reason and date.

If your company offers CalCOBRA coverage you will see an additional field. Indicate if this member will elect the CalCOBRA coverage and we will send out the CalCOBRA packets for enrollment. Companies offering Federal COBRA will not have this additional field.

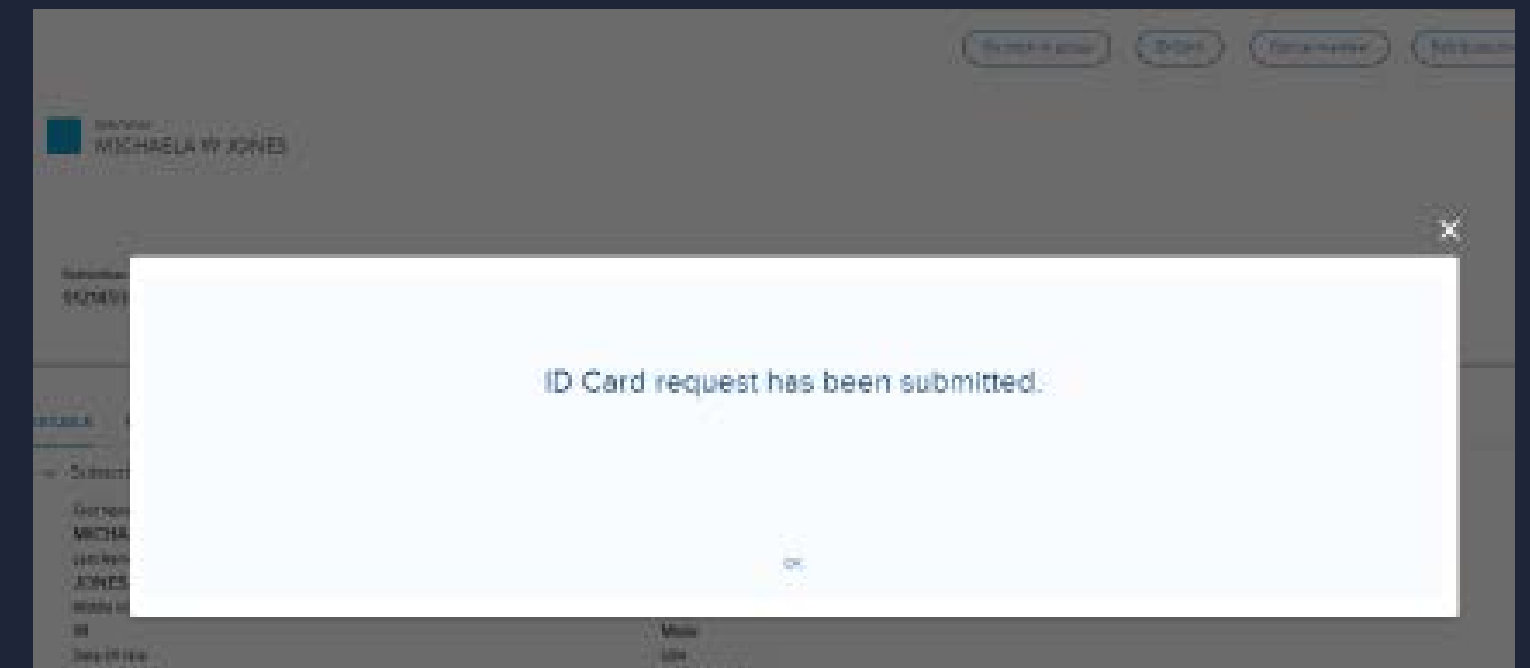
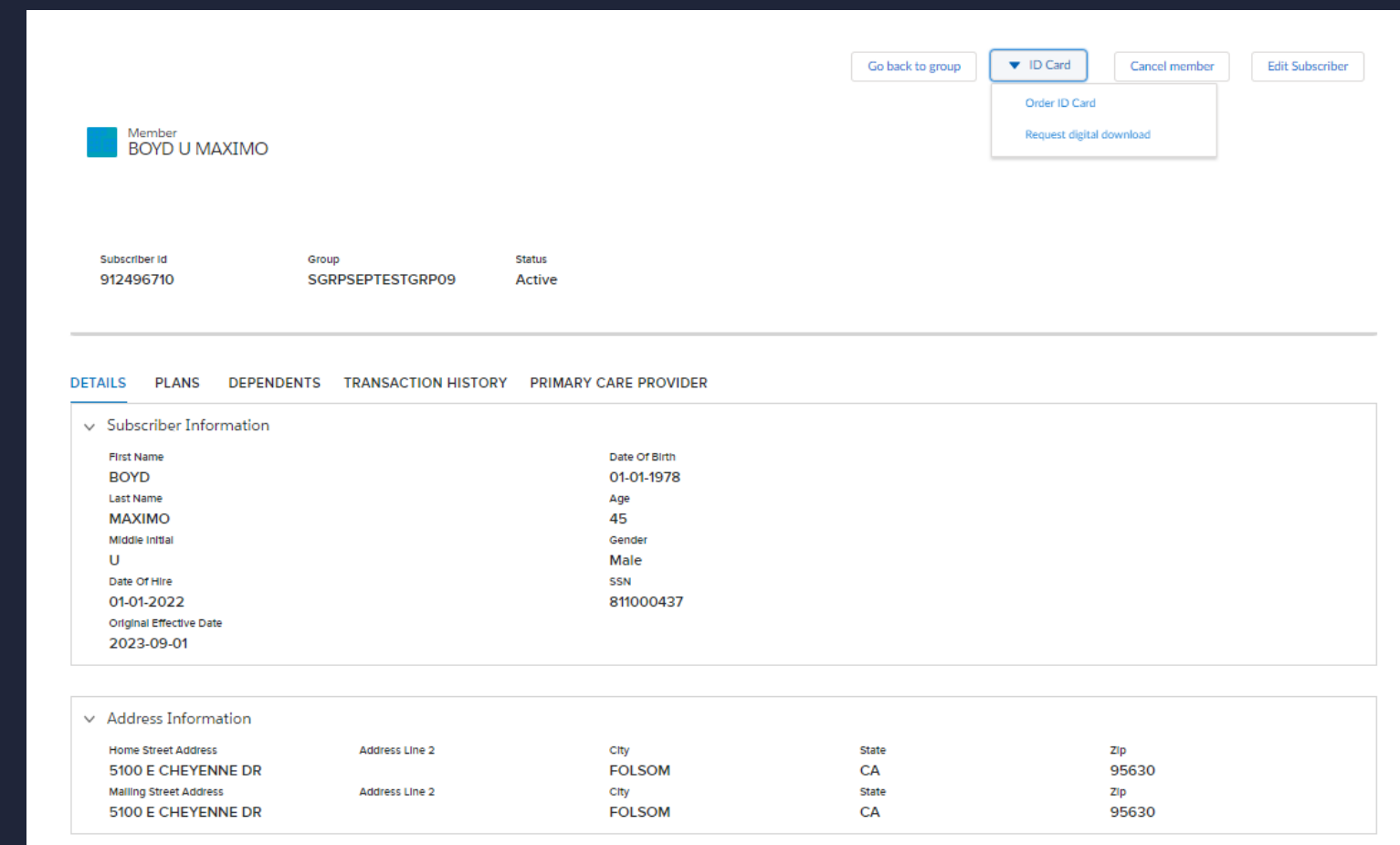
The screenshot shows a web form titled "Cancel member" with a close button (X) in a circle at the top. Below the title is a warning message: "Canceling members will remove them from Blue Shield of California healthcare coverage". The form is organized into sections. The "Subscriber" section is expanded and contains three input fields: "Member Name\*" with the value "MIGUEL TORRES", "Subscriber ID\*" with the value "909338975", and "Cancellation Reason\*" with a dropdown arrow. Below these are two date fields: "Cancellation Date\*" and "Benefit End Date", with a calendar icon between them. At the bottom of the form is a "Cal-COBRA Eligible" section with two radio buttons: "Yes" and "No". At the very bottom are two buttons: a large blue "Next" button and a smaller "Cancel" link.

# Order ID cards

Use for – Reissuing member ID cards. If the employee has dependents this will send new ID cards for the household.

How – Click on the ID card button on the member account page and select the Order ID option. A window will open confirming the ID card order.

Tip! ID cards will be sent to the channel identified by the member. If the member selects digital communications and digital ID cards, we will send the reissued card to their Blue Shield app. If the member selects paper communications and paper ID cards, we will mail the ID card.

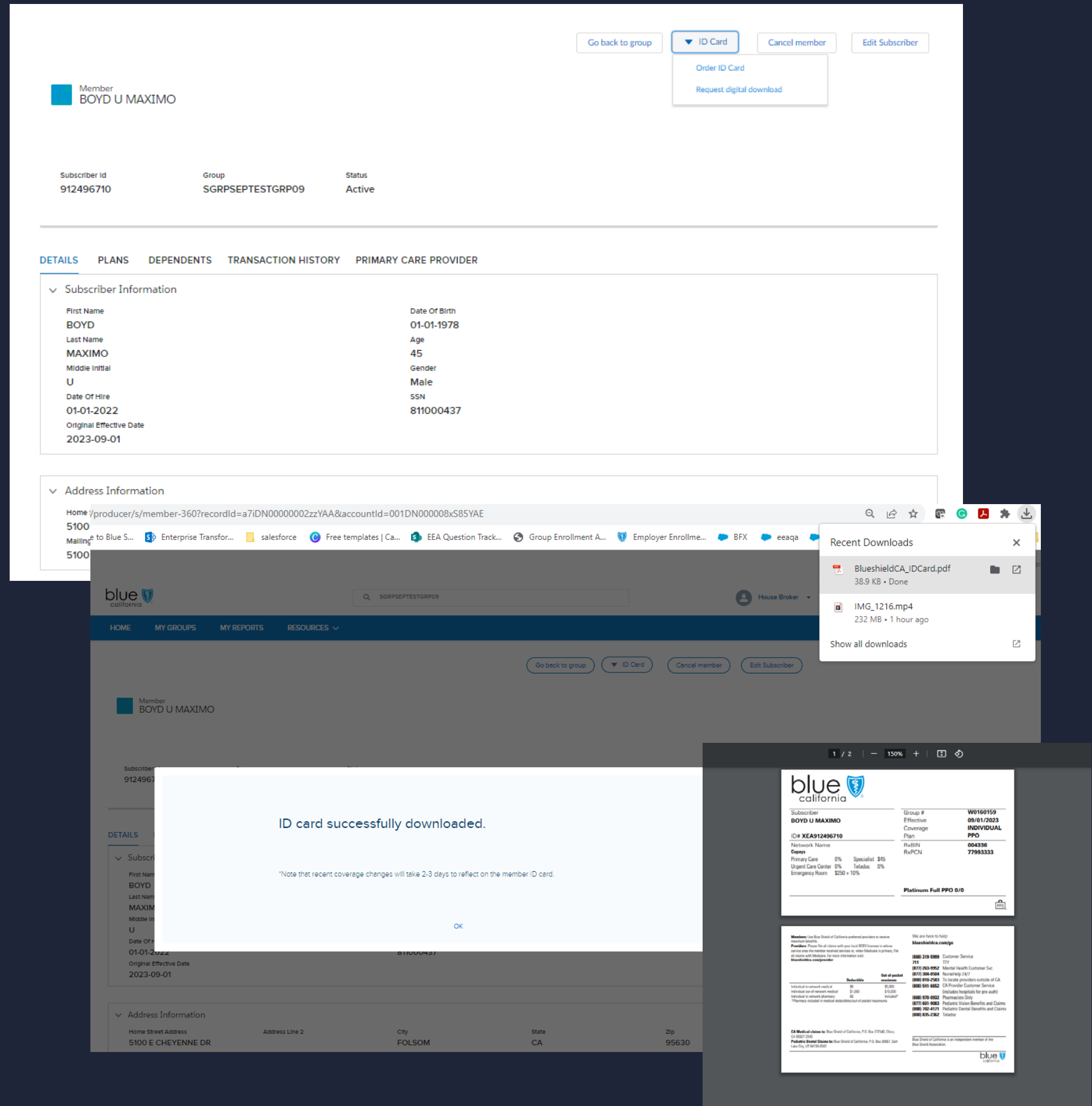


# Download ID cards

Use for – Reissuing member ID cards. If the employee has dependents this will send new ID cards for the household.

How – Click on the ID card button on the member account page and select the digital download option. A window will open confirming the ID card order. Only medical ID cards are available at this time.

Tip! Changes to the member record can take up to 2 business days to generate 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 with the toggle button, enter the effective date, and qualifying event information.

**Member plan modifications**

Specify the type of member plan change

Check the box to identify the type of member plan change to edit enrolled plans or cancel enrolled plans. Then provide the date for this change and request reason.

Add Products or Change Plans  Cancel Product

Qualifying Event\* ▼

Qualifying Event Date 📅

Select the Effective Date for Adding New Product and/or New Plans 📅

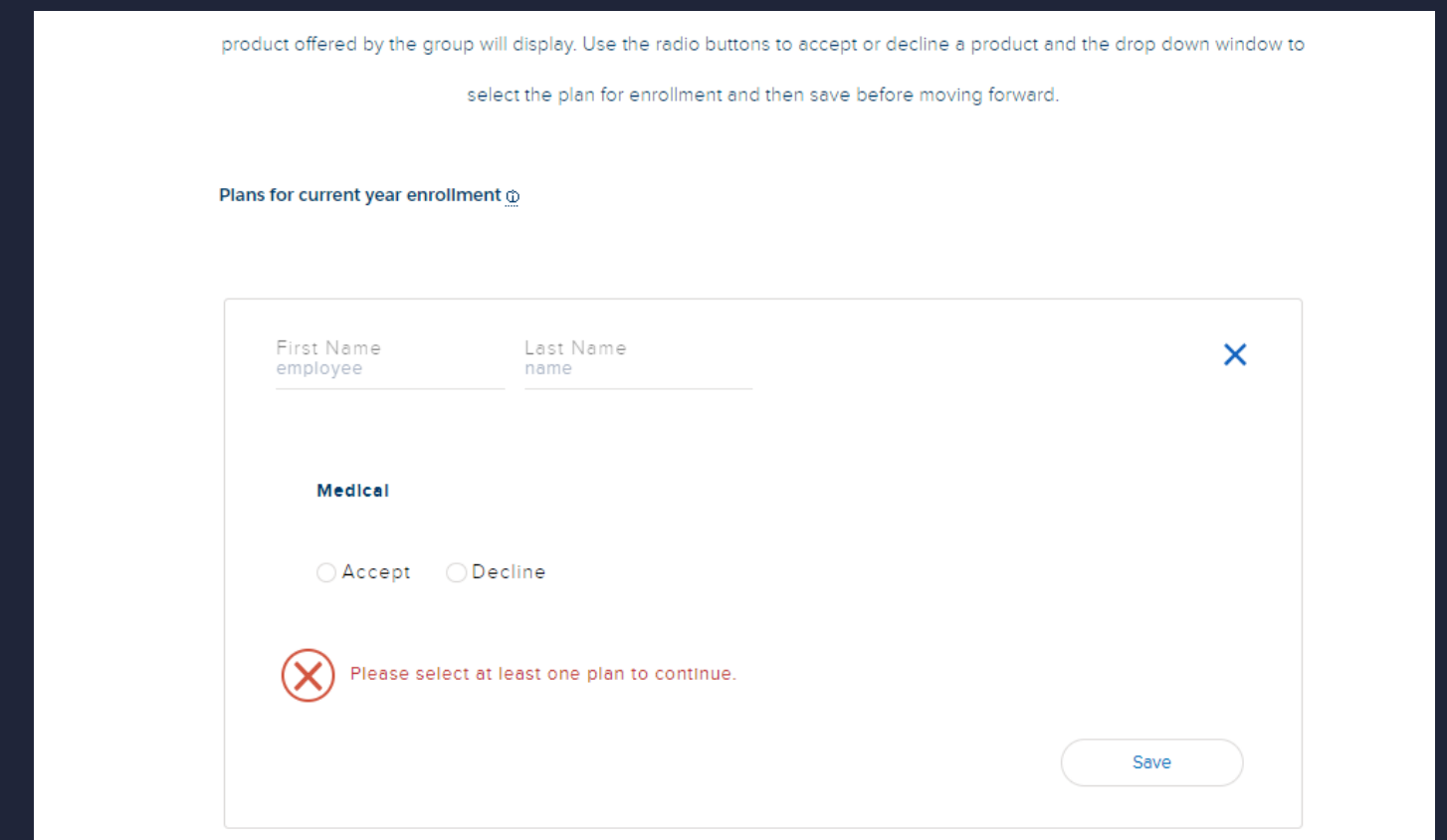
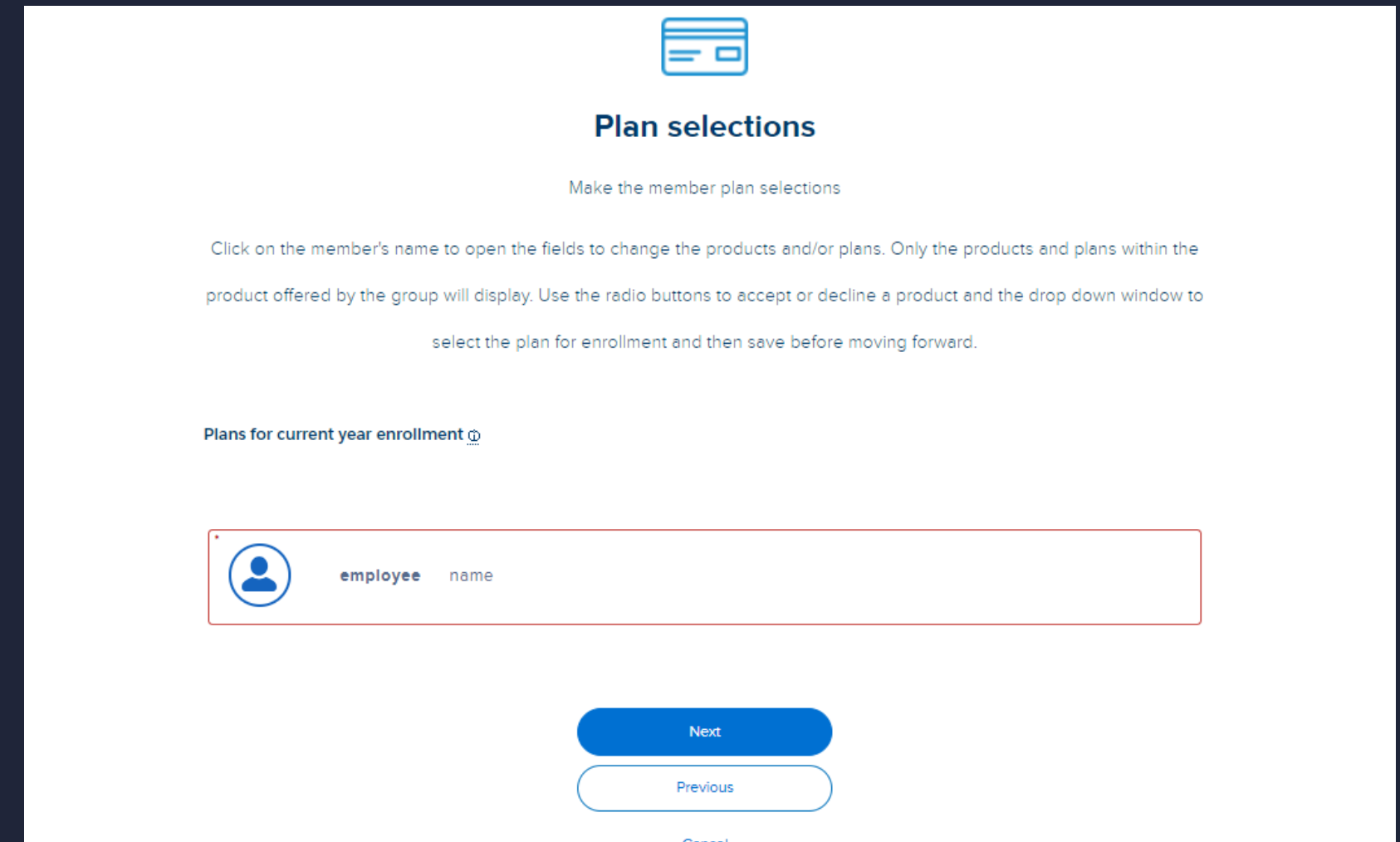
[Next](#)

[Previous](#)

[Cancel](#)

# 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 Save.



# Add dependents

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**  
Enroll dependents to the subscriber

Enter the member application information into the fields. Click +Add new dependent to enroll multiple dependents together.  
Click Delete dependent to remove the additional dependent application fields.

Required fields must be completed before moving forward.

Qualifying Event\*  
Loss of Coverage

Qualifying Event Date  
08-29-2023

Effective Date  
08-30-2023

The effective date does not reflect the group's waiting period calculations. If a waiting period applies, the effective date will be recalculated once it is received for processing.

▼ Dependent Details

Dependent Type\*

First Name\* Middle Initial Last Name\*

Date of Birth\* Primary Care Provider Primary Care Dentist [Find a Doctor](#)

Gender\*

Gender Identity

SSN

Communication Preference Email

Same address as subscriber?  Yes  No

Same Race and Ethnicity as the subscriber?  Yes  No

[Add another dependent](#)

# Add dependents continued


2) Select the plan elections for the dependent based on the employee's elections. Click on the Save button before moving to the next step.


### Plan selections

Make the member plan selections

Click on the member's name to open the fields to change the products and/or plans. Only the products and plans within the product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.

Plans for current year enrollment @

 **MIGUEL** TORRES

 **dependent** name ✕

First Name dependent Last Name name ✕

**Medical**

Accept  Decline Gold Trio HMO 0/30 OffEx

Save

Next

Previous

Cancel

# 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 details

Make changes to the member demographic information

Click on the member type to open the fields to change the member information.

Required fields must be completed before moving forward.

▼ Subscriber

First Name* MIGUEL	Middle Initial ▼	Last Name* TORRES
SSN 615431172	Date of Birth* 09/07/1989	
Gender* Male	Gender Identity ▼	Marital Status* Single
Date of Hire 07-29-2019		
Subscriber Status* <input checked="" type="radio"/> Full Time <input type="radio"/> Part Time		
Earnings (excluding overtime, bonuses, etc.)		Earnings Frequency ▼
Salary Effective Date		
Effective Date 10-01-2019		

# Member contact & classification

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

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.

**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

MIGUEL TORRES ✕

Home (Physical) Address\*  
304 W ROBERT AVE ✎

City\* OXNARD State\* CA Zipcode\* 93030

Address Line 2

Use updated Home address for mailing address

Use updated Home address for all dependents

Mailing address (if different from home)\*  
304 W ROBERT AVE ✎

City\* OXNARD State\* CA Zipcode\* 93030

Address Line 2

Work Phone  
805 793 9407

Home Phone Language Preference\*  
English

Email

Class\* ACTIVE CA ELIGIBLES Effective Date\* 10-01-2019 📅

Sub Group\* CLEAR CONSTRUCTION Effective Date\* 10-01-2019 📅

Add/Update Department Code  Cancel Department Code

Department Code Effective Date 📅

Save

Next

Previous

Cancel



# Federal 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.

## COBRA enrollment

Enroll the subscriber and any dependents into COBRA

Enter the COBRA application information into the fields. Use the radio buttons and drop down windows to change the current plan selections for the COBRA coverage. Required fields must be completed before moving forward.


▼ Qualifying Event Details

Choose Qualifying Events ▼ Original Qualifying Event Date\* 

▼ Classification Selection

Class\* ▼ Subgroup\* ▼

This field is required. This field is required.

 The group indicated that they do not cover COBRA members. Please cancel this enrollment and navigate to Class Offerings within the group maintenance section before beginning the COBRA enrollment.

# Exception reviews

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 is important to complete the transaction even if the document is provided at a later time.


Exception Review

**The current transaction contains an exception and needs to be reviewed by Blue Shield before processing it. We will send status communications to the email on file for this account.**

**Enter the exception reason in the field below. As an added option, upload documentation to help support this exception request by clicking on the document upload button to search and attach the document. Note that documents are not required at this time.**

EXCEPTIONS	DOCUMENTS NEEDED
Group name update requested	1. IRS documentation of new name per EIN or W9 or SS-4 2. Proof of name change showing old and new name, as follows: a. Amendment and/or Conversion document, filed with CA Secretary Of State (Corporations, Partnerships, LLC only) and/or b. Fictitious Business Name (FBN) statement, filed with county (sole Proprietor) or DBA changes


Reason for submitting this exception request?

 Enter the exception reason before moving to the next screen

Upload Supporting Documents

Or drop files

Will Upload Later

 Blue Shield cannot begin the review process until documents are provided.

# Upload 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
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
10. Click save

# Support

Access additional tool resources on Employer Connection's [resource page](#)

Additional resources for enrollment and eligibility support:

- [2023 Admin Guide](#)
- [Employer Connection Quick Start Guide](#)
- [Employer Connection Reference Library](#)

Need to talk to someone?

[Sales Account contact list](#)

Small Group Employer Services (800) 325 - 5166

Core Group Employer Services (855) 747 - 5809

Trouble logging in? Use the username and password reset links on the login page for immediate login assistance