



Employer Enrollment Tool

Quick Start Guide

Your guide on the road to more confident quotes and enrollments.

Quoting

The quote process takes the user through the employer's information, group census, plan selection, and employer contribution amounts.

To start a quote:

- Click on New Quote from the Employer Enrollment Tool landing page.
- Enter the group's information.
- Add an employee census file by either uploading a census CSV or adding employees individually into the tool.
- Select the products and plans to be quoted.
- Plans are displayed as cards that include the plan name, monthly premium, and high-level benefit information including the deductible, out of pocket max, prescription copay, deductible, and common copays.
- Compare up to three plans at a time by selecting the compare box on the plan card. The comparison view includes rates and benefit cost shares or copays.
- Contribution amounts for each product selected can be provided for both the eligible employee and dependent.
- Upon completing the quote a CSV file is created and available for immediate download or email.
- Additionally, request a PDF file and be notified by email when the PDF is available for download within the tool.

To view a saved quote:

- Click on View Quote from the Employer Enrollment Tool landing page.
- Filter the list by selecting My Quotes – In Progress.
- Click on the link Complete Quote listed next to the group's name.
- The screen will open to the step where information was last saved.

To download the quote proposal:

- Click on View Quote from the Employer Enrollment Tool landing page.
- Filter the list by selecting My Quotes – Completed.
- Click on the group's name in the Quote Name column.
- Select the PDF or CSV link from the Files box.

Tips

- Chrome is the preferred browser.
- Fields with logic are indicated by a green asterisk. The asterisk will turn red when a field contains an error or is missing information.
- Use the drop-down selection feature where present, such as for Tax ID, to make selections.
- Plan pairing rules and contribution are enforced during quoting
- Quote information will remain in the tool for 60 days after submission
- Starting an enrollment with a finished quote will carry over the group's information to the enrollment application.

Enrolling

The enrollment process takes the user through the Master Group Application, Employee Enrollment Application, initial payment form, and broker attestation.

To start an enrollment:

- Click on New Enrollment from the Employer Enrollment Tool landing page.
- Enter the group's information, group coverage, and group eligibility details.
- Select the products and plans to be enrolled.
- Contribution amounts for each product selected are requested for both the eligible employee and dependent.
- Enter Broker of Record information.
- Add an employee enrollment census file by either uploading a census CSV or adding employees individually into the tool.
- Confirm the group's information and enrollment selections. Then acknowledge the broker attestation or send an eSignature request for the MGA.
- Enter the group's payment details for the initial payment amount.
- If required, upload supporting documents required for review.
- Upon completion of the application a confirmation message with either an approval or next steps will be displayed.

To view a saved enrollment:

- Click on View Enrollment from the Employer Enrollment Tool landing page.
- Filter the list by selecting My Enrollments – In Progress.
- Click on the link Complete Enrollment listed next to the group's name.
- The screen will open to the step where information was last saved.

To view the enrollment proposal:

- Click on View Enrollment from the Employer Enrollment Tool landing page.
- Filter the list by selecting My Enrollments – Completed.
- For a CSV format, click on the group's name under the Account Name column and select the Enrolled Members tab.
- For a PDF format, click on the group's name under the Contract Number column and select the Files tab.

Tips

- Date fields require MM/DD/YYYY format. If a field has a drop-down calendar to pick a date, first pick the month, day, and year.
- Free form text fields have a character limit of 40 characters.
- Information will be automatically saved during active sessions so you can move around pages without needing to reenter fields. Click "save for later" on any screen to save your progress and entered information when ending a session.
- A pre-populated MGA PDF is available to download on the Summary Review page. It is expected that the user download the PDF to receive and keep record of the employer's signature.
- Enrollment information will remain in the tool for 90 days after submission.

Email notifications

Emails will be sent to the address tied to the Broker Connection profile.

Emails include automatic reminders, status notifications, and requests for information.

Actionable	Informational
Pend for additional information - log into the tool and upload requested documents	Pend resolution/ decision - Approval and declination notices
Additional information reminder - 5 days after the pend email, we will send automated emails to remind you to provide requested information	Application expiration - Incomplete applications expire after 30 days
Installation complete - Log into the tool to download your enrolled member census complete with member IDs	Task assignment - No action is required. This is not a pend email.

Pend and underwriting related emails will use a new address.

WCOEPendResponse@BlueShieldCA.Com

Do not reply to emails with document attachments.

Tips

- Requested documents must be uploaded to the tool to begin the application review process by Blue Shield.
- Incomplete enrollment applications will expire after 30 days.
- Applications that are approved upon submission will not receive a separate approval email. You will be sent an email once the group has successfully installed.

Enroll with confidence

Helping you focus more on your clients and communities,
and less on paperwork



Digital capabilities

- 24/7, 365 access
- Intuitive interface built for brokers
- Self service reports & dashboards



Reliability

- Consistent & transparent process
- Real time statuses
- Knowledgeable support teams



Ease of doing business

- Straight through automation
- Faster pend reviews
- Streamlined master group application