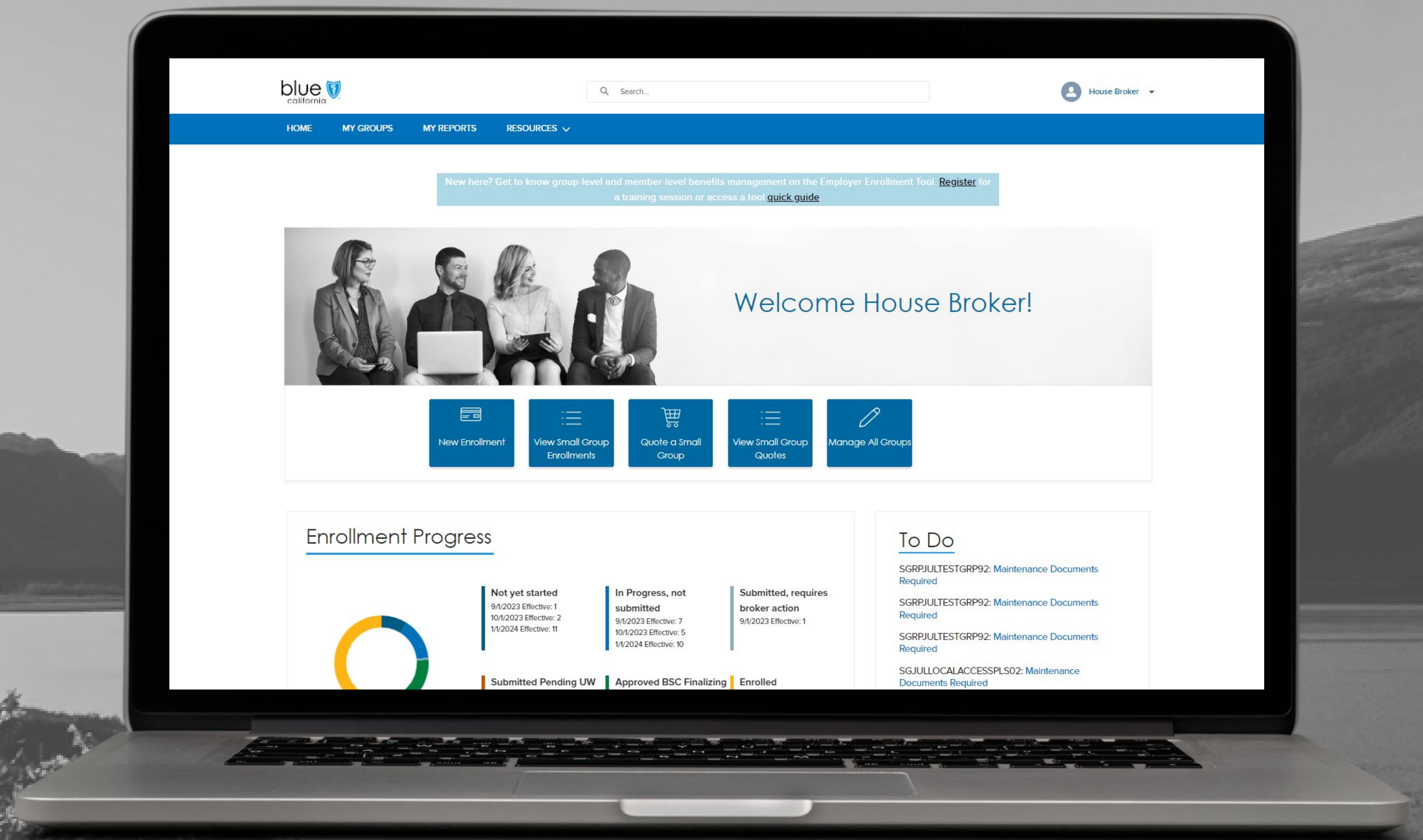

Employer Enrollment Tool

Maintenance guide for brokers

Last updated March 20, 2024

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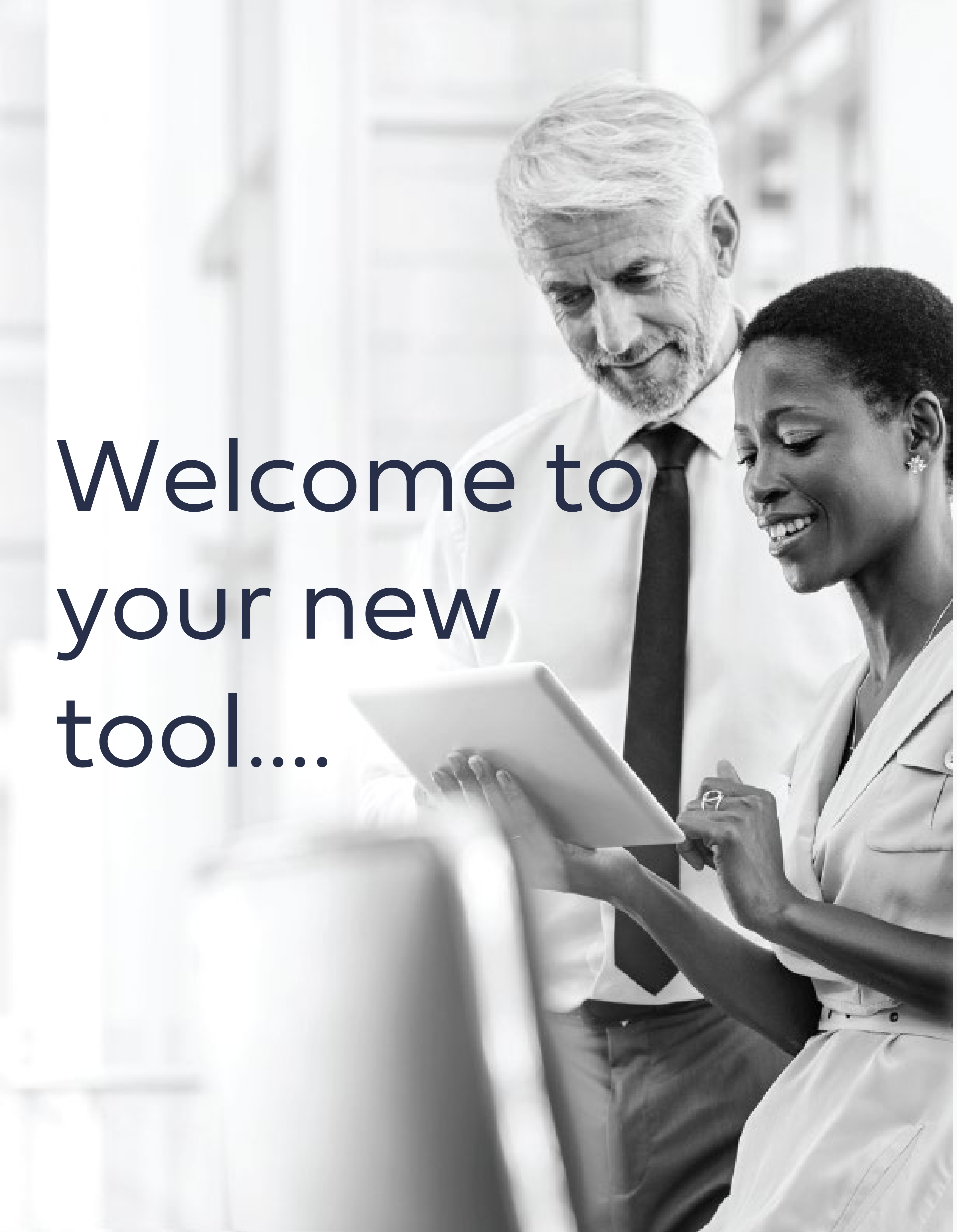


Welcome to your new tool....

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

3 minutes

Features available in one tool

25

Tool submissions with self-service status tracking

100%

Tool tips

1. Views default to your recently viewed information. Use the filters My Account 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

More tool tips

9 If the Class field menu is blank check the member's address and the group class plan offerings. Out of state class plans need to be setup before enrolling members with out of state addresses. Use the Class card to add out of state coverage

10 Part time coverage needs to be setup at the group level contract before enrolling part time employees. Use the Eligibility Options card to adjust this coverage

Download the EET FAQ for more tips

11 EDI or Electronic File Feed users should use their file as the primary source of submitting enrollment information. EET is recommended for urgent, timely submissions between scheduled files.

12 Newborn dependents will not display in the tool as full standing dependents until 31 days after birth. During the 31-day period, the newborns are covered under the subscriber's plan with access to coverage

13 Duplicate submission records will be captured if changes are submitted via the tool and paper/PDF. Only one submission will process completely with the duplicate displaying a Pending status.

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

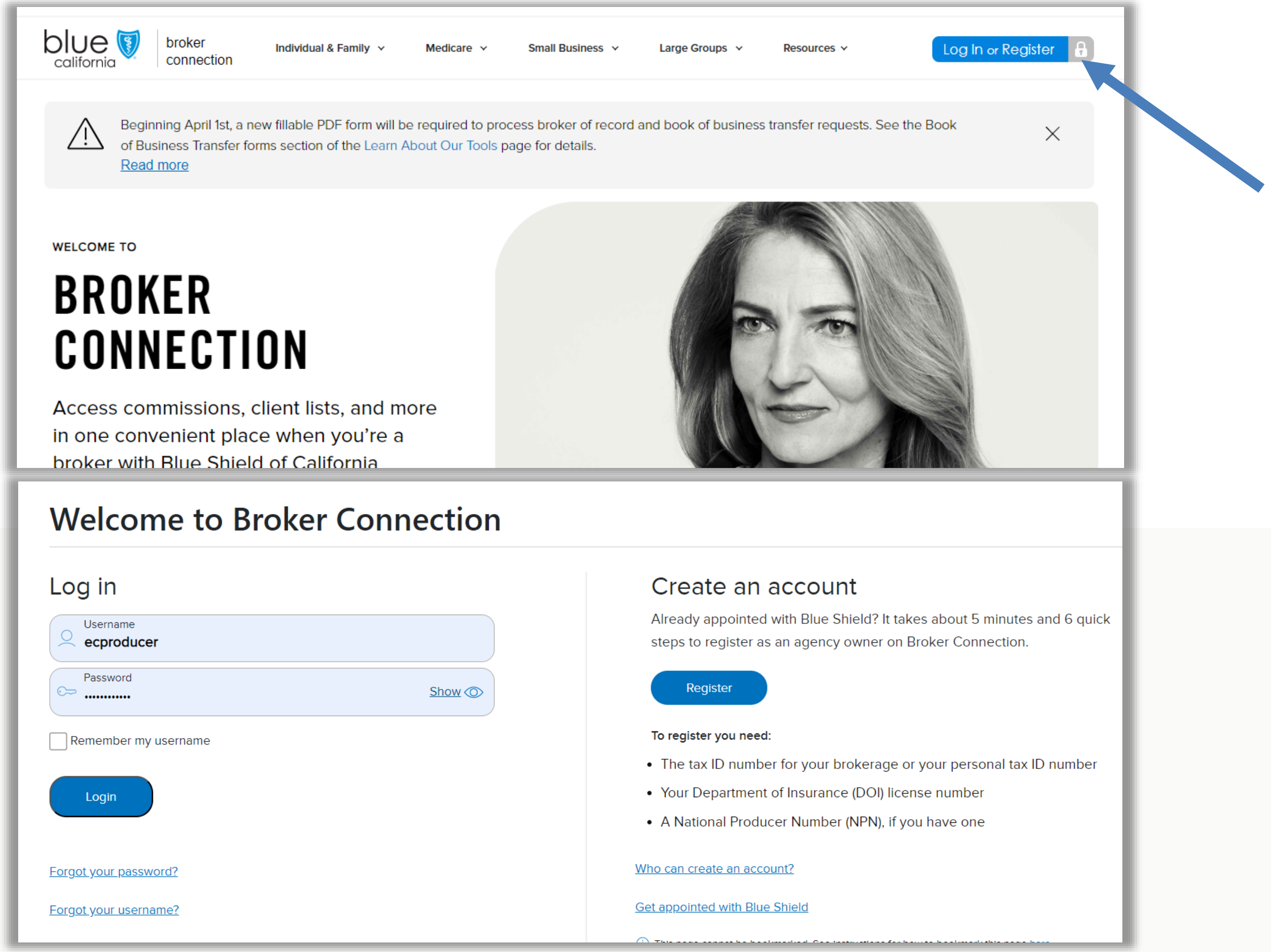
Group

- 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
- Bulk member cancelation

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

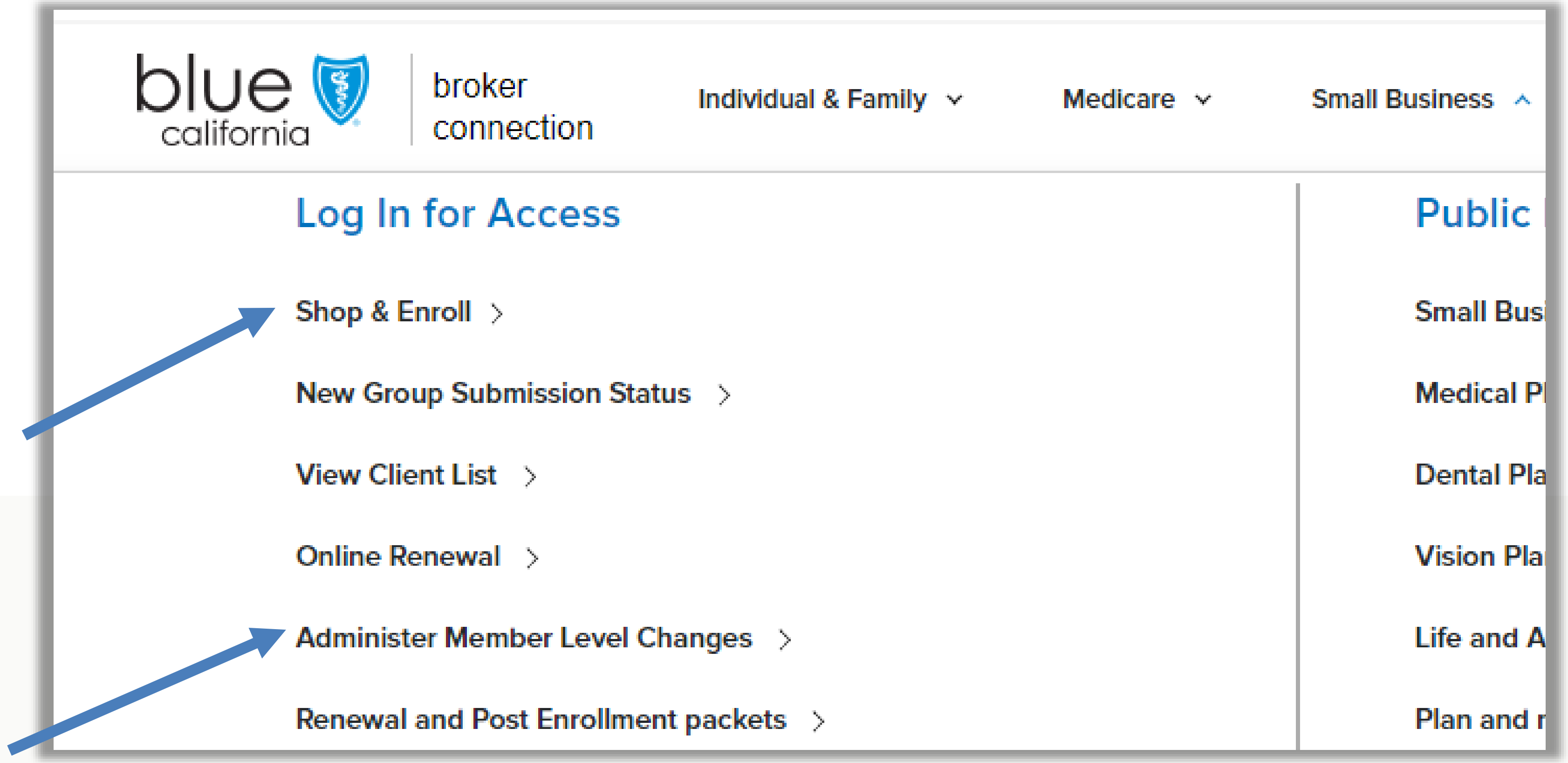
Navigate to the tool



Step 1. Log into Broker Connection

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

Navigate to the tool



Step 2. Click on the administer member level changes link

The link 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.

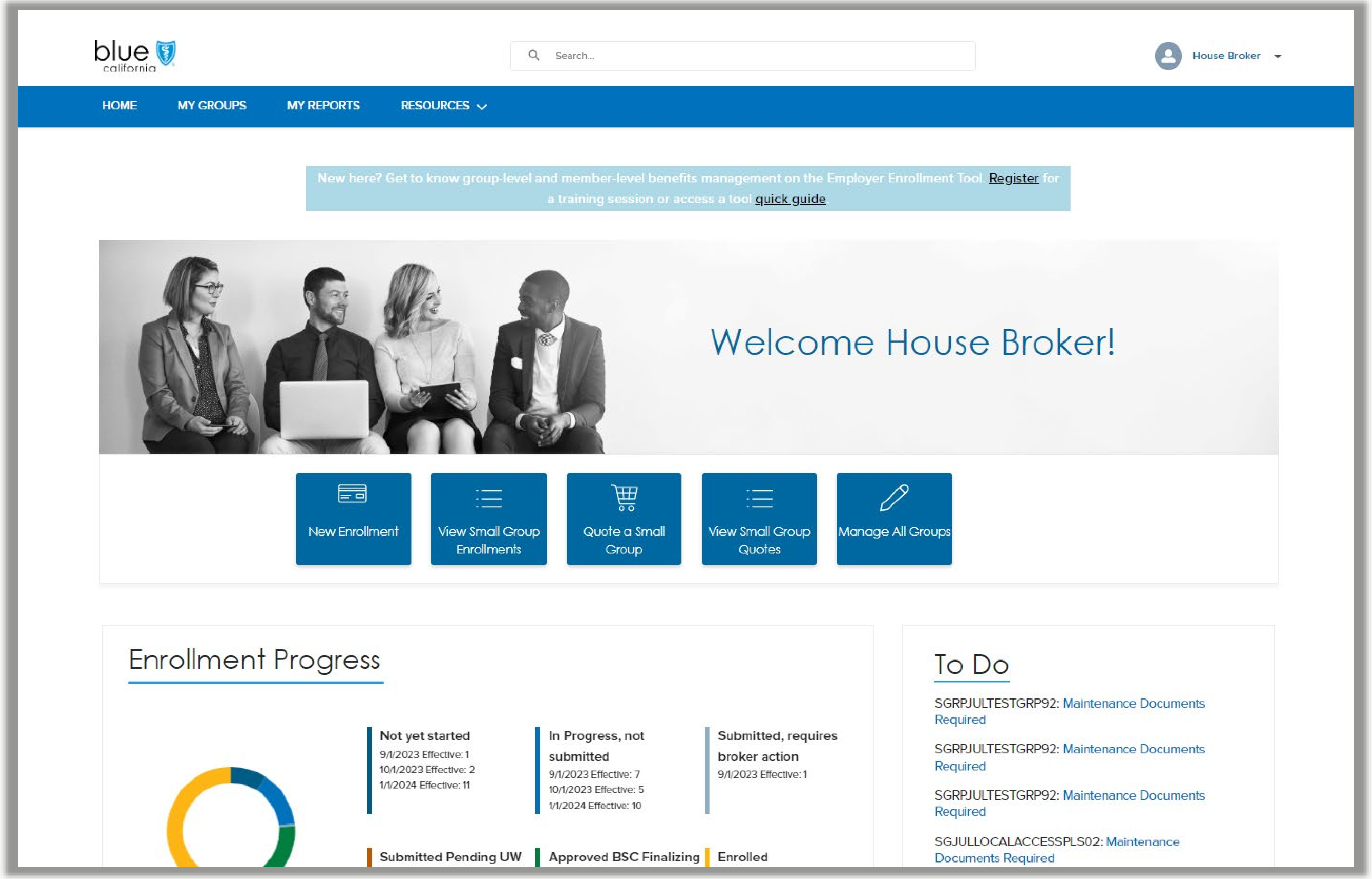
•Home returns the user to the Employer Enrollment Tool home page.

•My Groups displays the company account.

•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.



Group level changes

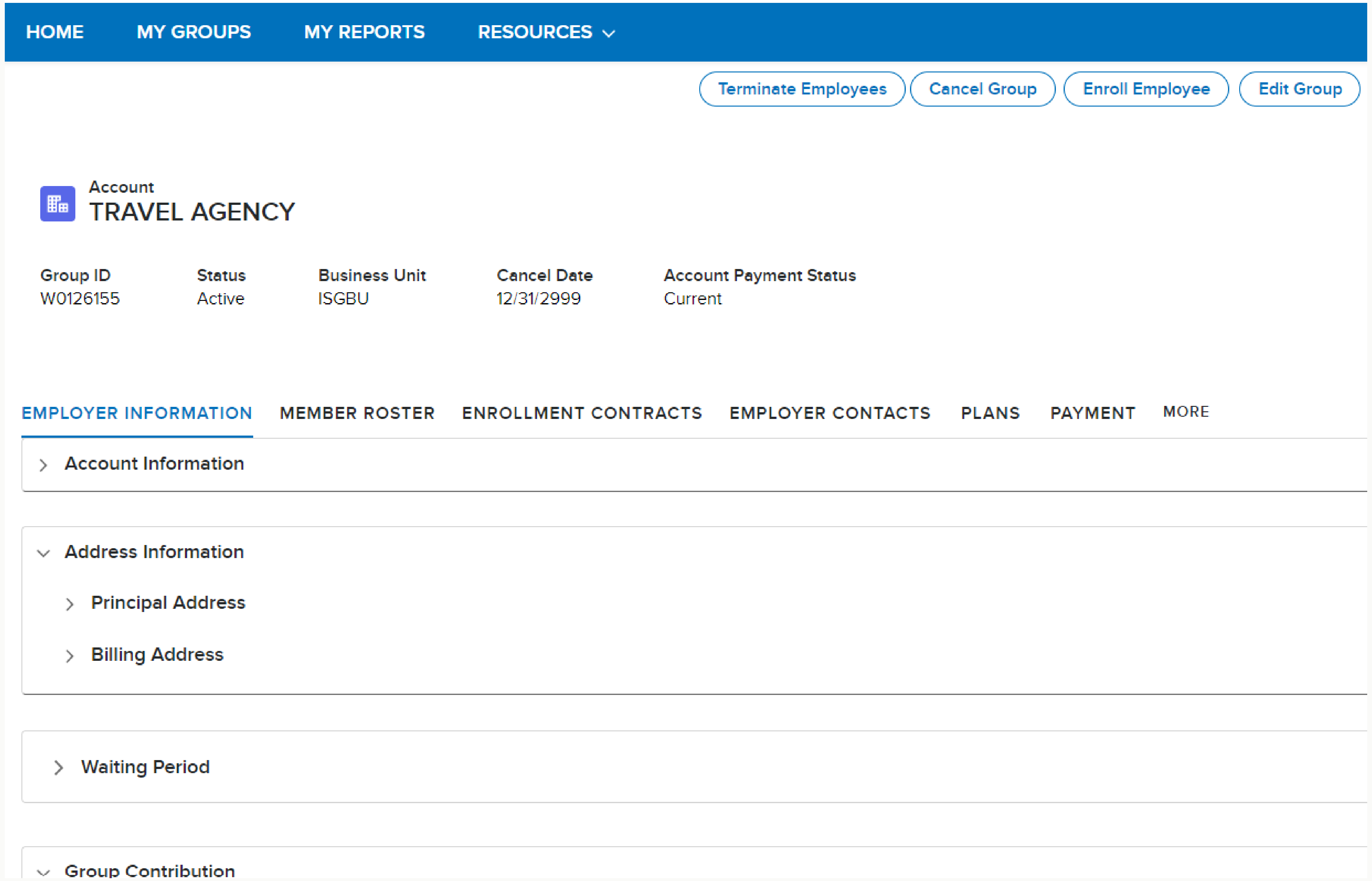
Remember group features are available by line of business

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.



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
- Bulk cancel members
- Bulk member plan moves

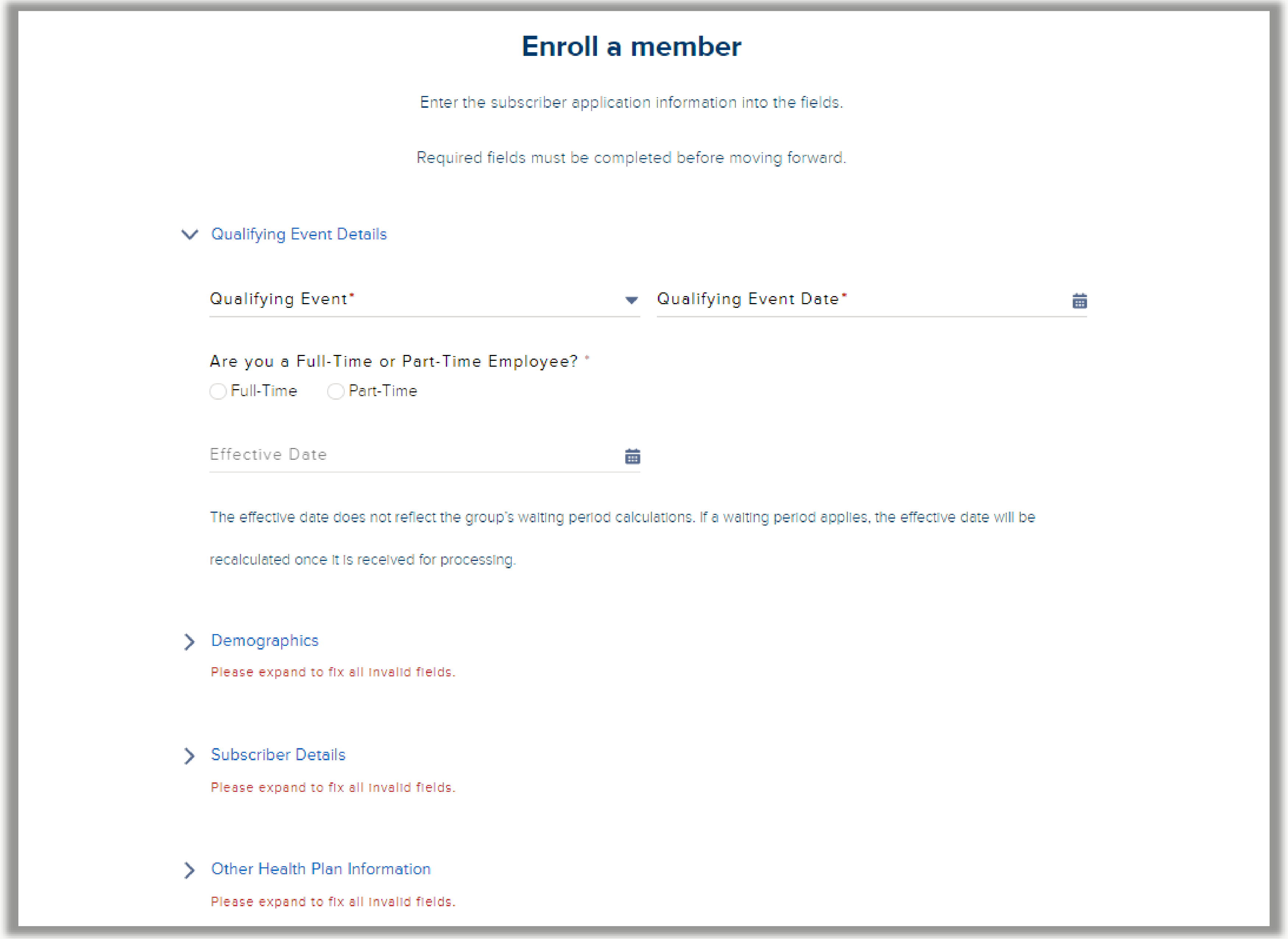
Large Group/ Core

- Enroll Employees
- Group details
- Group contacts
- Cancel group
- Bulk cancel members

Enroll employees

Use for - Enrolling new employees and their dependents

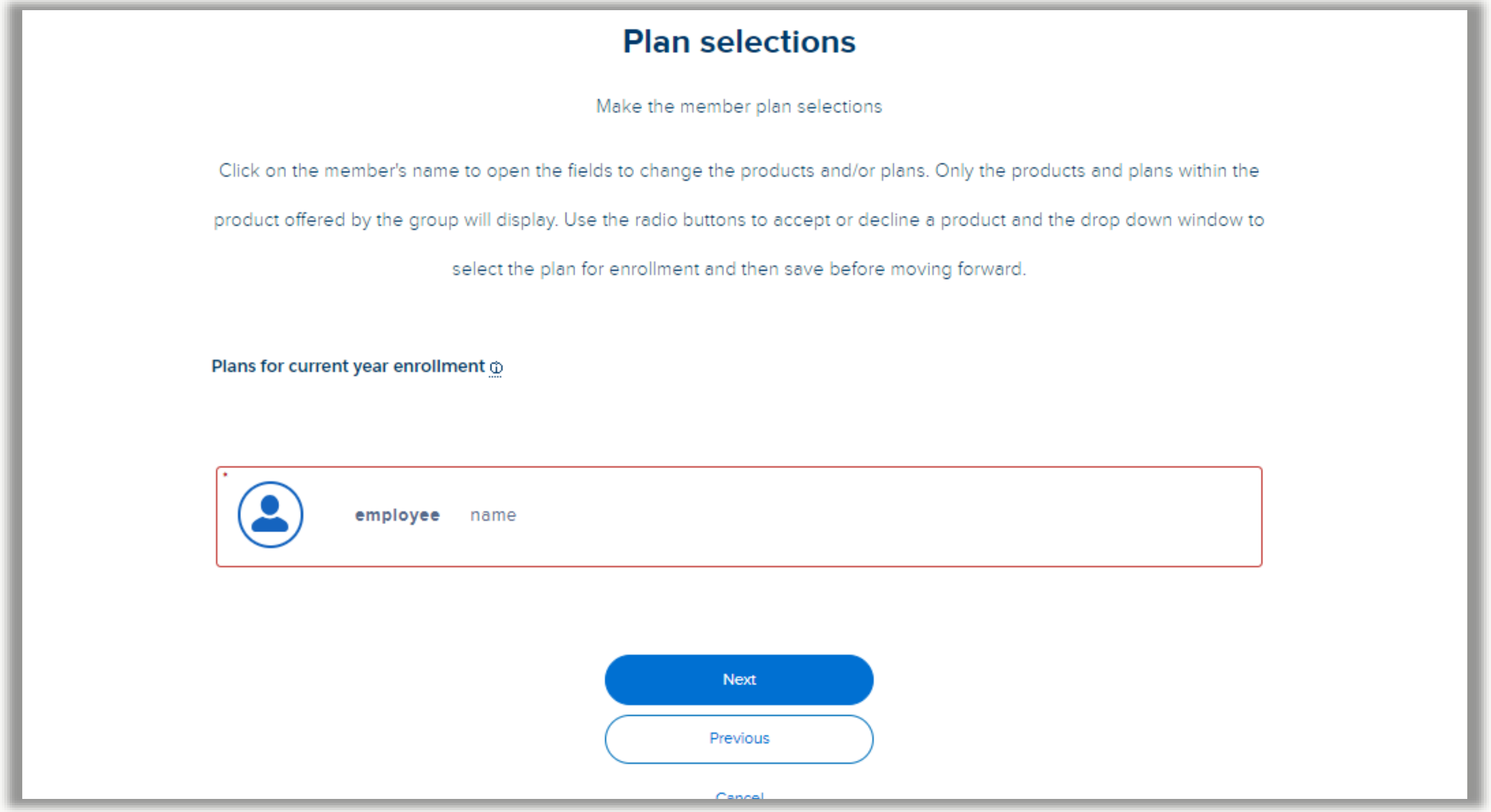
How - This transaction has a two-screen workflow. First, enter in the enrolling employee's information. This is the same information captured on the Employee Enrollment Application (EEA) form.

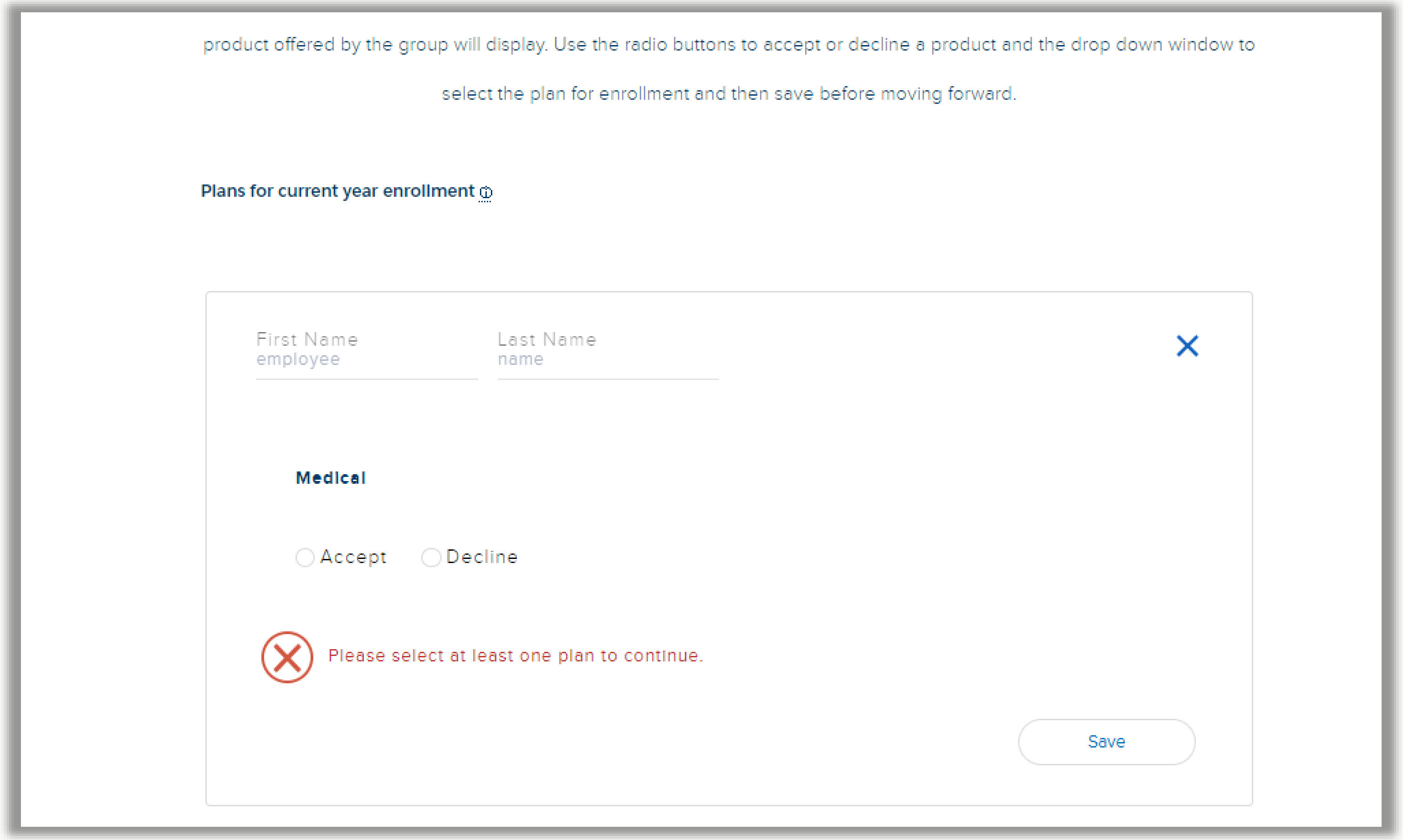


Enroll employees continued

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.





Group cancelation

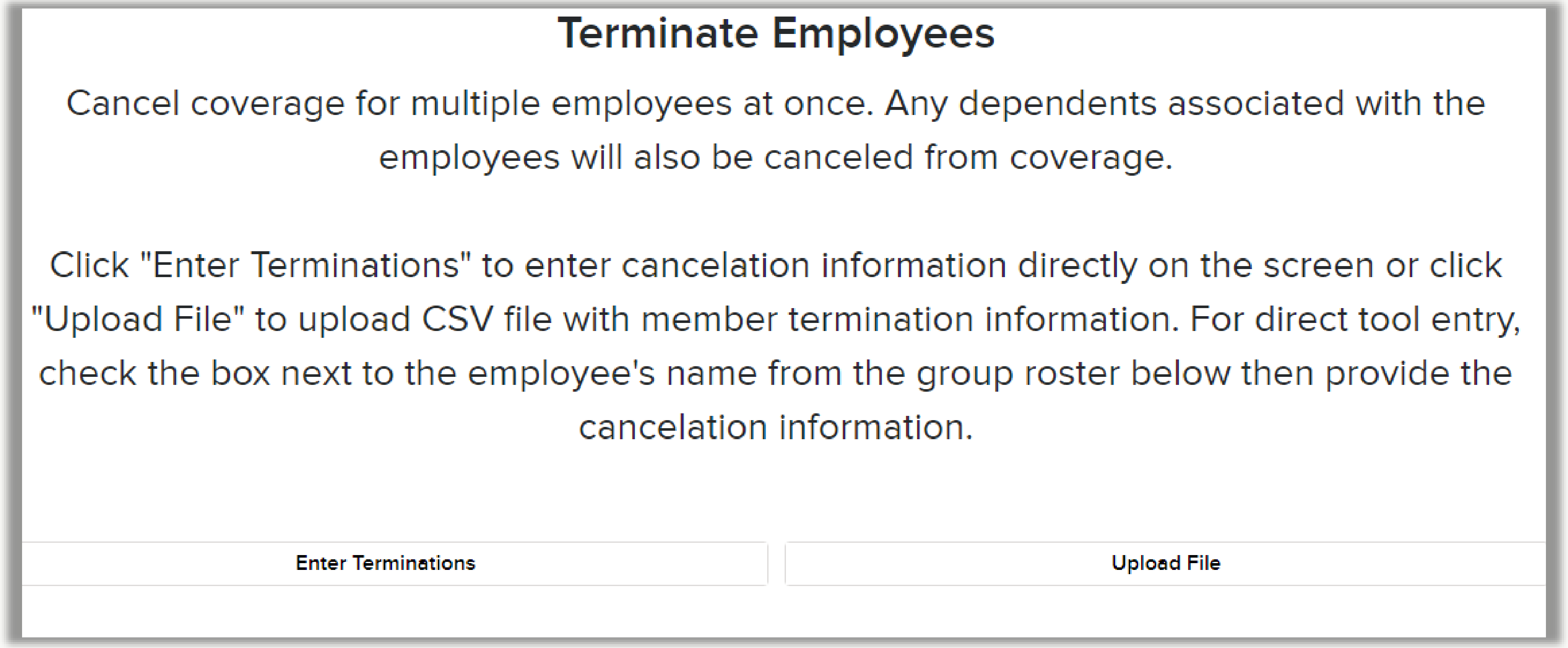
Use for – canceling a company's Blue Shield coverage.

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

Bulk member cancelation

Use for – Cancel coverage for multiple members in one screen.

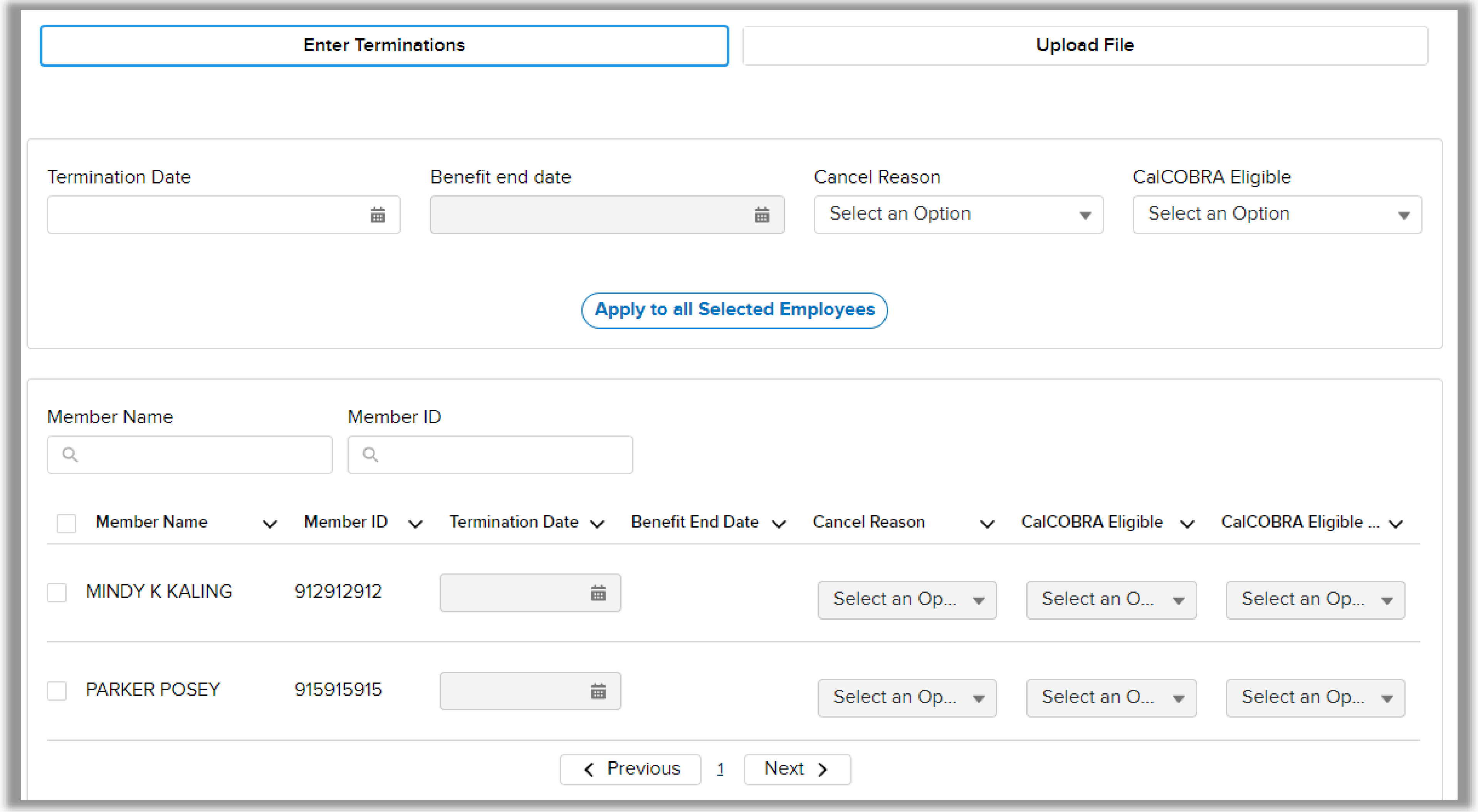
How – Use the toggle button to select how to provide the cancelation information. You can directly enter the information into the tool or provide a CVS document upload.



Bulk member cancelation continued

Direct tool entry

How – Select the members and enter their cancelation details in the table. Use the check box next to the member's name to select them for cancelation. For larger rosters, use the name or ID search to quickly find and select members. Next, provide the cancelation date and reason. If all the employees have the same date and reason, use the Apply to all Selected Employees button to save you clicks.

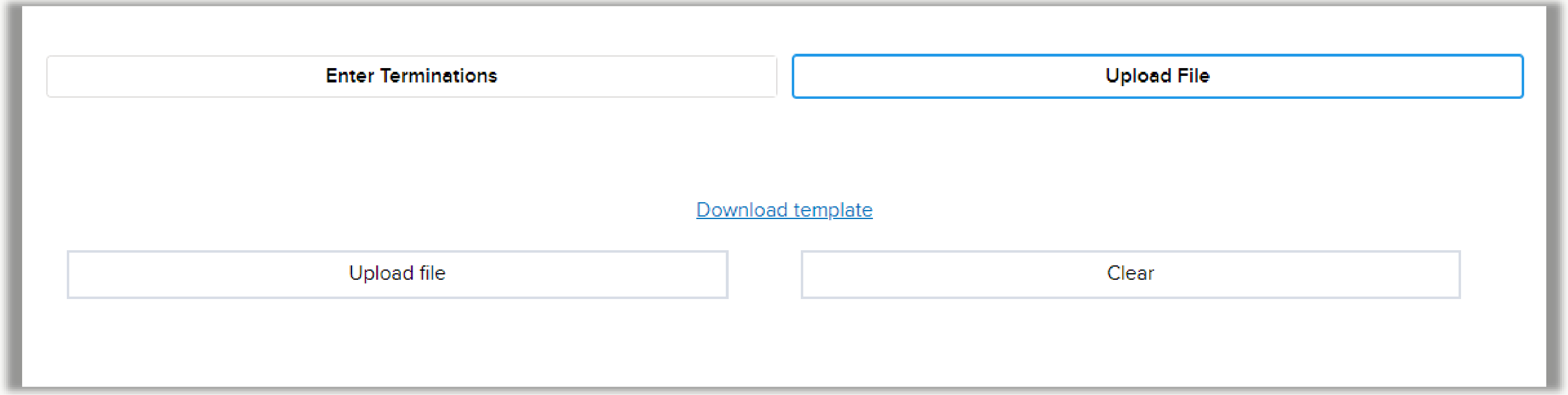


Note only Small Business groups will be asked for CalCOBRA eligibility. If you select Yes, the tool will automatically trigger the CalCOBRA enrollment to be sent to the member. You do not need to submit the paper CalCOBRA notification form when you notify Blue Shield through EET.

Bulk member cancelation continued

CSV document upload

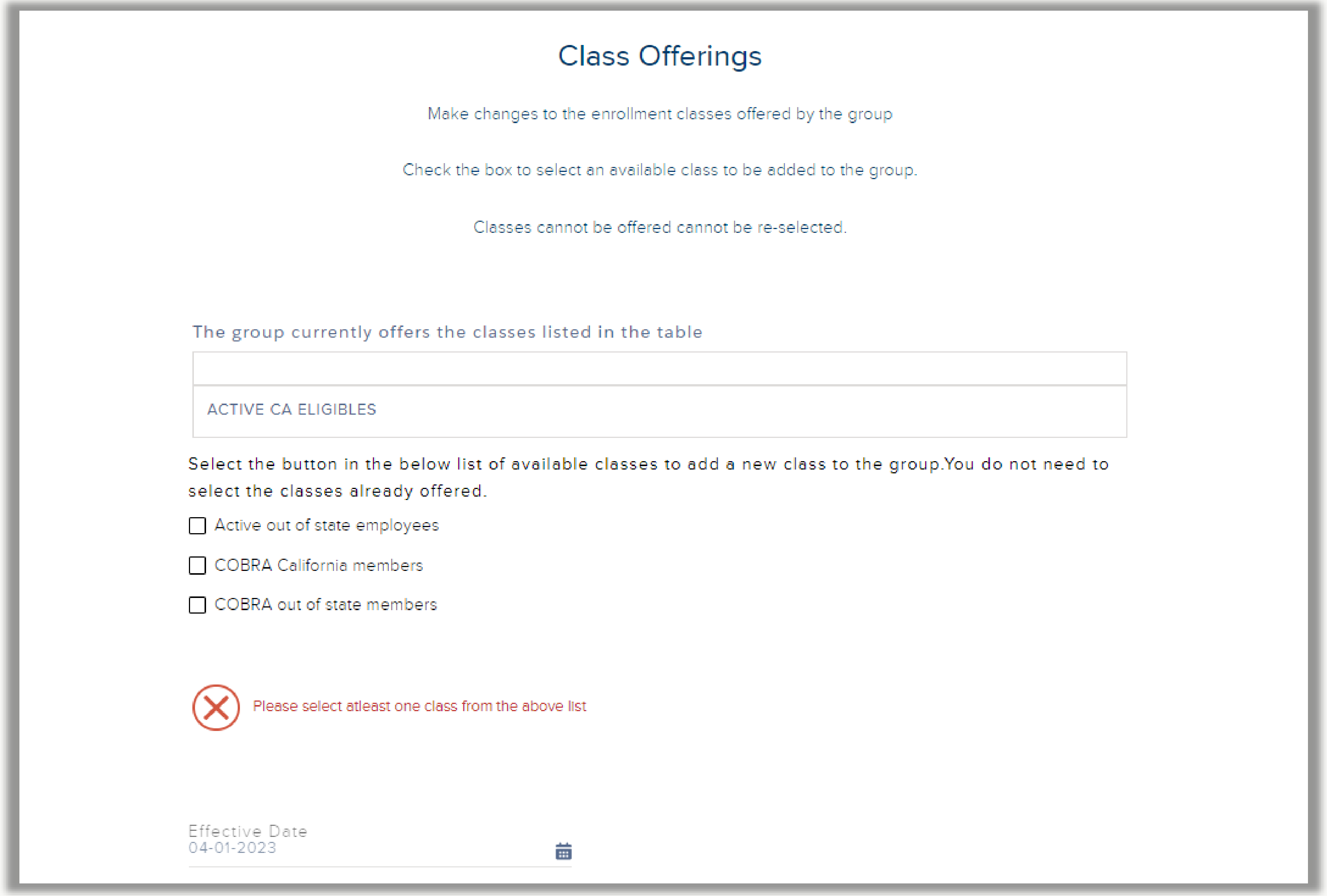
How – Click on the Download template link. Read the template instructions tab before filling in information. Provide the member name, cancel date, and reason into the corresponding columns. If a Small Business, enter in the CalCOBRA notification columns. Next, save the document as a CSV file. Navigate back to the tool and click on Upload File. Preview your file in the table before moving forward.



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.

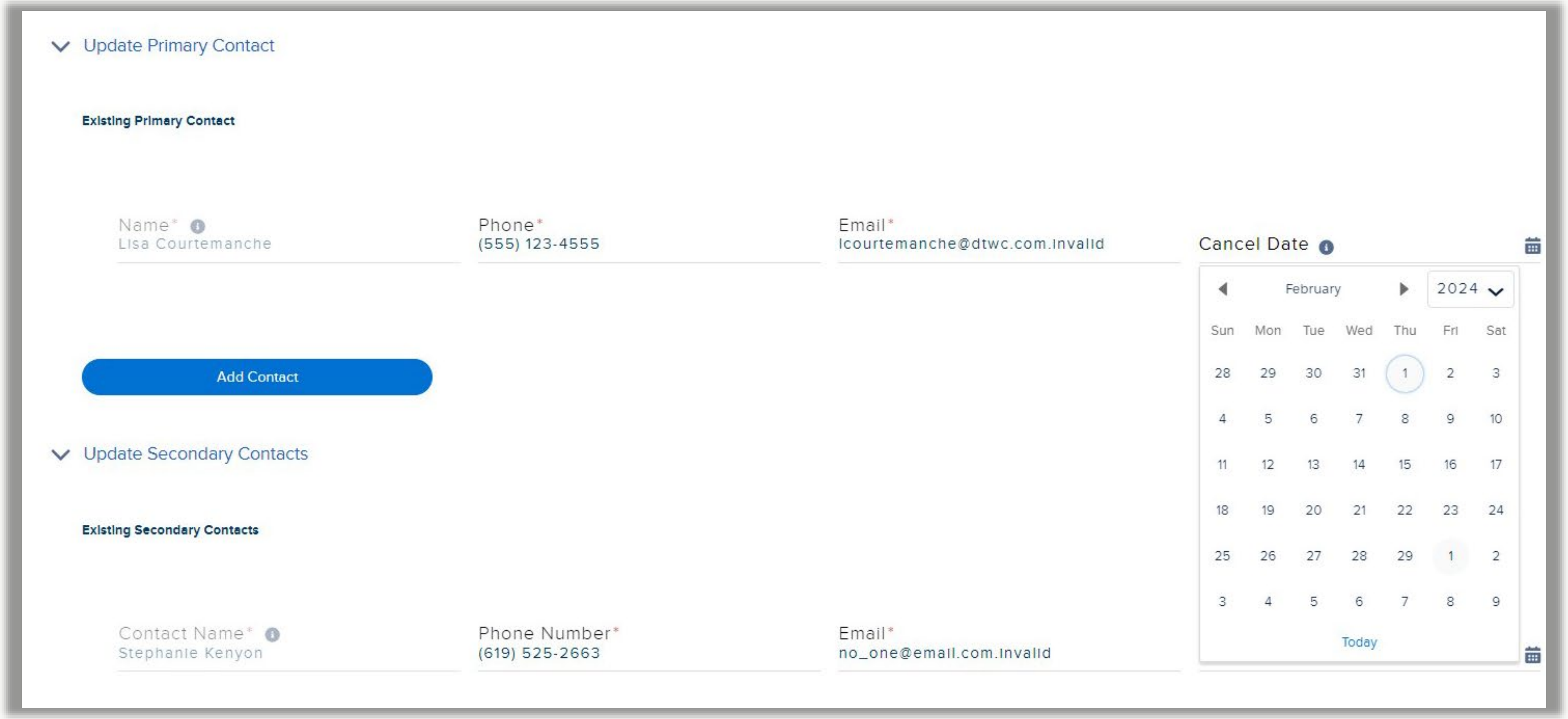
How - The tool will display the current active classes. Select the radio buttons to add a new class. The tool will display an auto calculated effective date for the change to take effect.



Group contacts

Use for – Edit, remove, and add the contacts for the group.

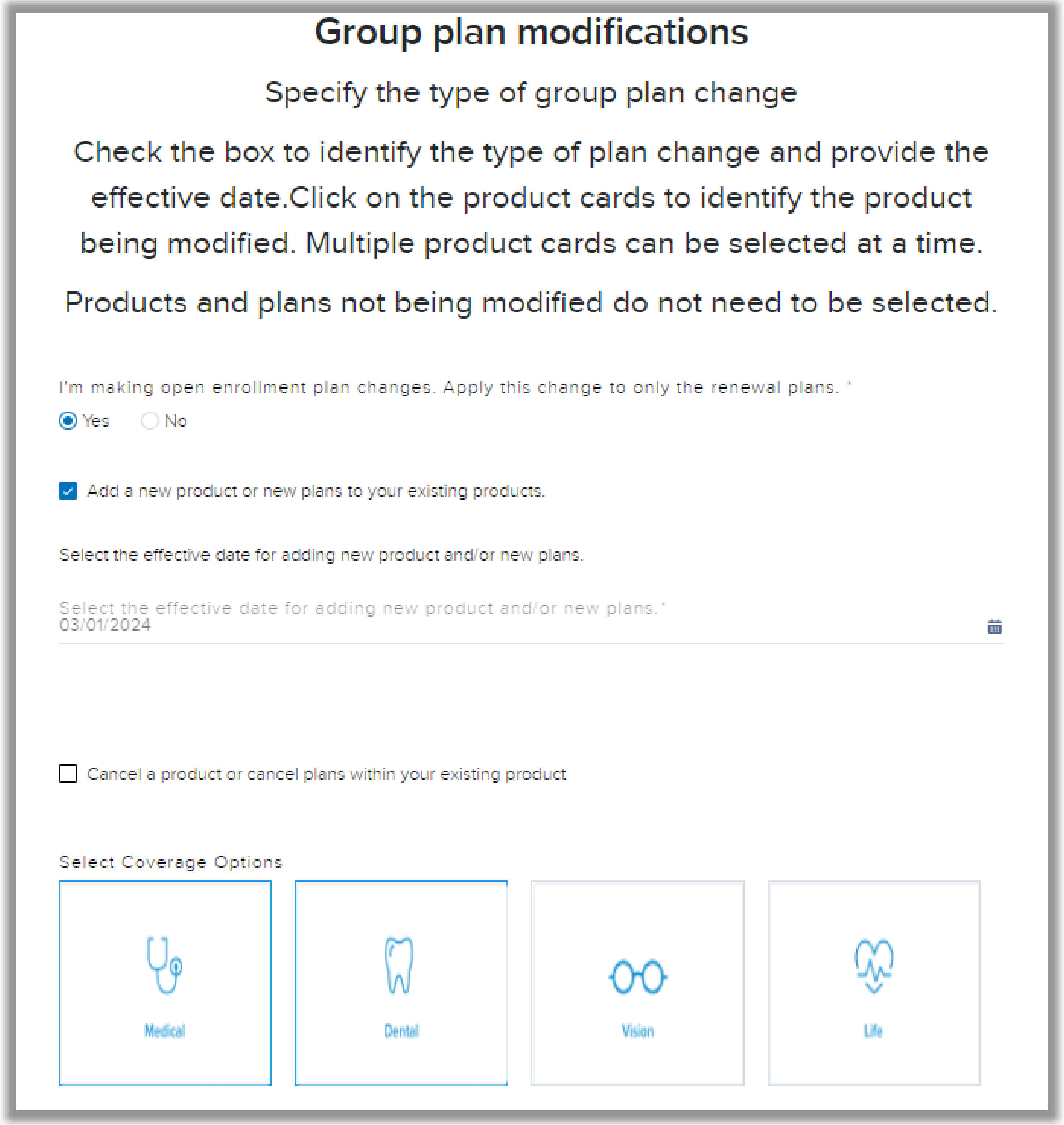
How - The tool will display the current active contacts. Select the add contact button to add new contact information into the fields. Enter a cancelation date to remove a contact effective that date. Validation will ensure that required contacts are always active.



Group plan changes

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

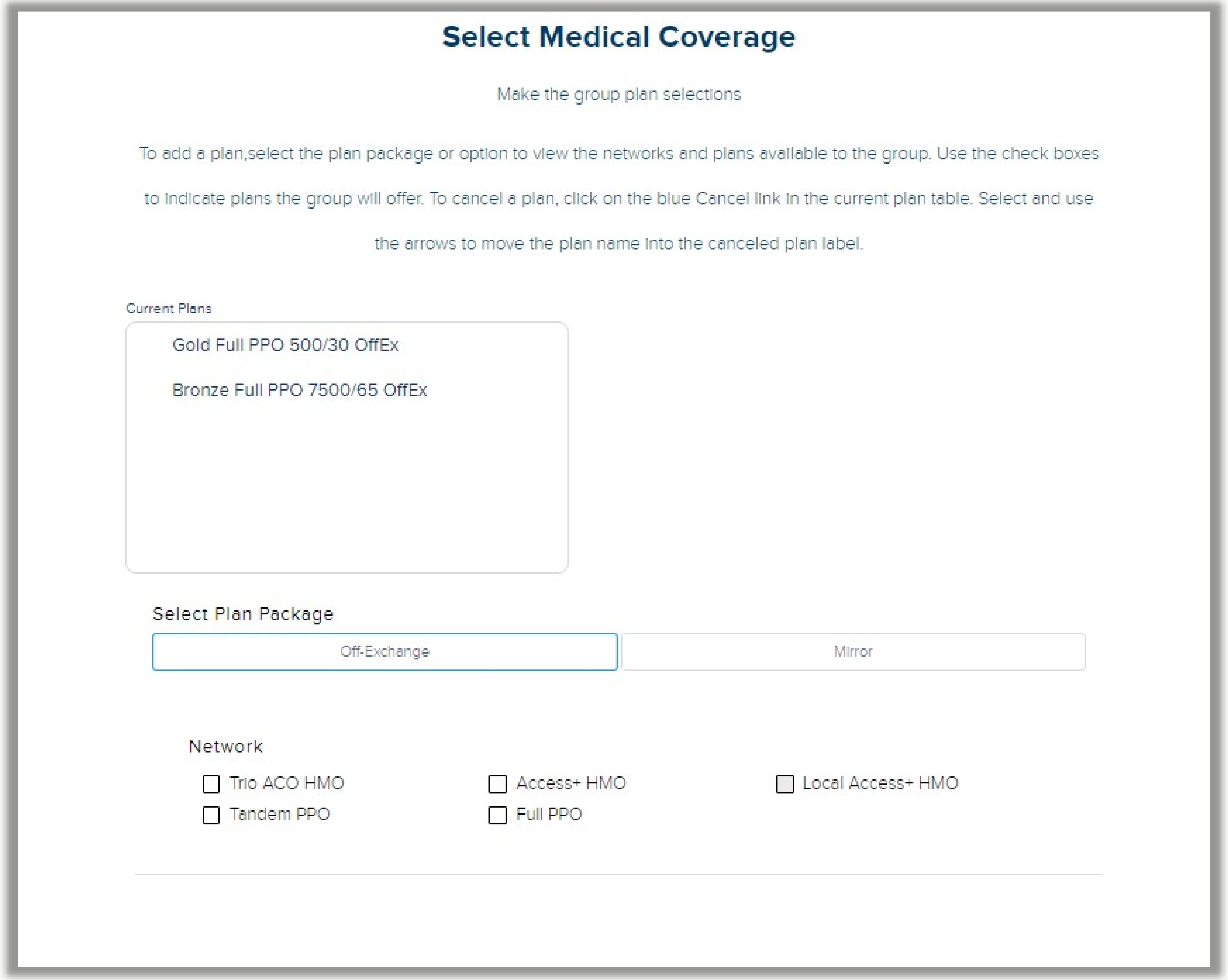
How - This transaction has a two-screen workflow. First, identify the type of plan change by checking the box next to that option, enter the effective date, and qualifying event information. Then, select the product related to this change (medical, dental, vision, or life) by clicking on the card. Multiple 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

Add a plan or product

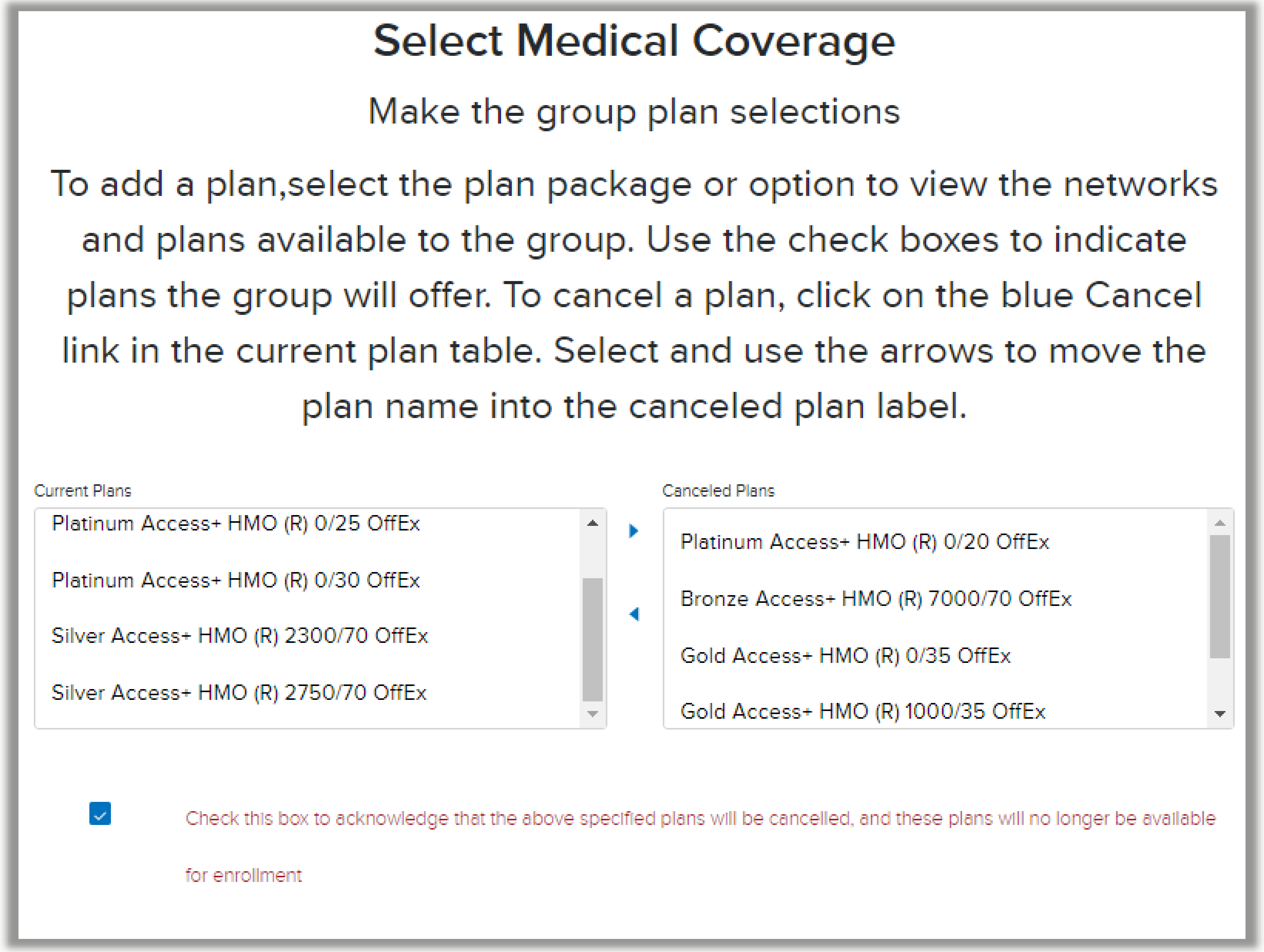
1) select the plan package (medical) or plan offerings (specialty) type.
2) select from the networks available to the group. Note we will not show out of network as selectable options.
3) a list of plans will be presented. Use the checkboxes to mark the plans for the group. Note use select all or deselect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



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.

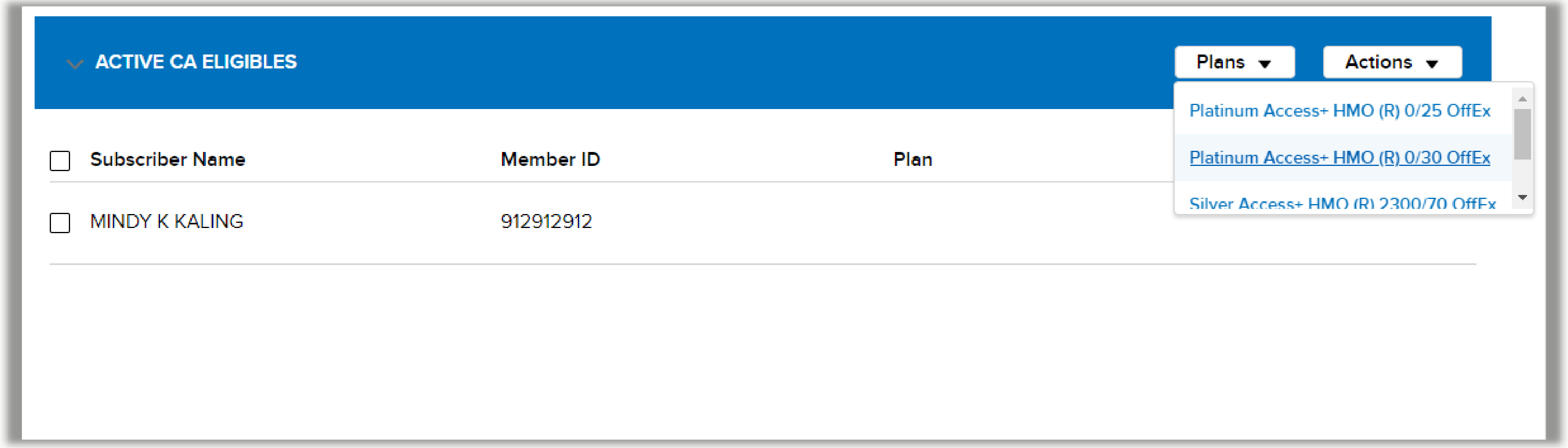


Note changes to medical benefits will prompt the tool to re-affirm the selections for the group's infertility rider.

Bulk member plan changes

Use for – Small Group only. Update multiple subscriber plan elections at once in one screen.

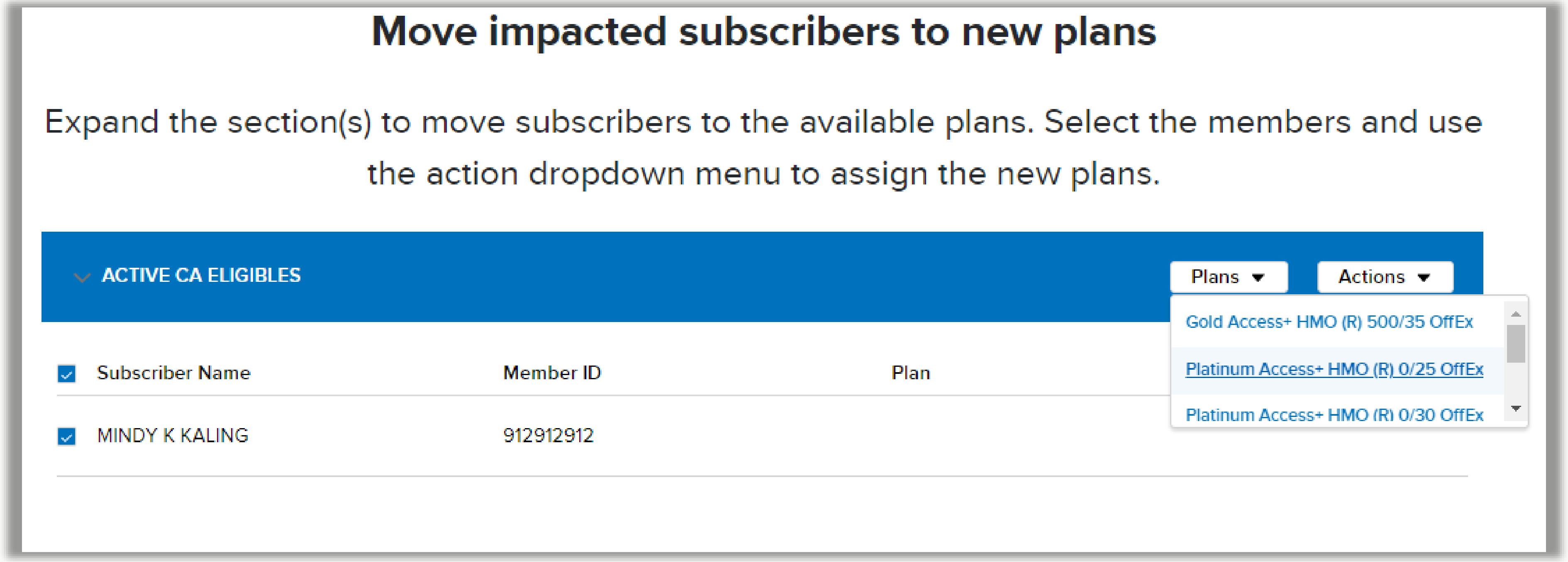
How – The bulk member plan changes are only available when you make a group level plan change. Off-cycle and open enrollment plan changes initiate different rules so refer back to the Blue Shield Admin guide to understand the different enrollment rules.



Bulk member plan changes

Off-cycle plan changes

How – Expand the class sections to view the impacted subscriber roster for the respective class plan. Check the box by the member or members' name to make their plan assignment. If multiple subscribers are moving to the same plan, check the boxes next to all names. Next, click on the Plan menu and select an available plan in the menu. Finally, click on the Action menu and select Assign Plans. Repeat these steps for all subscribers in the roster.

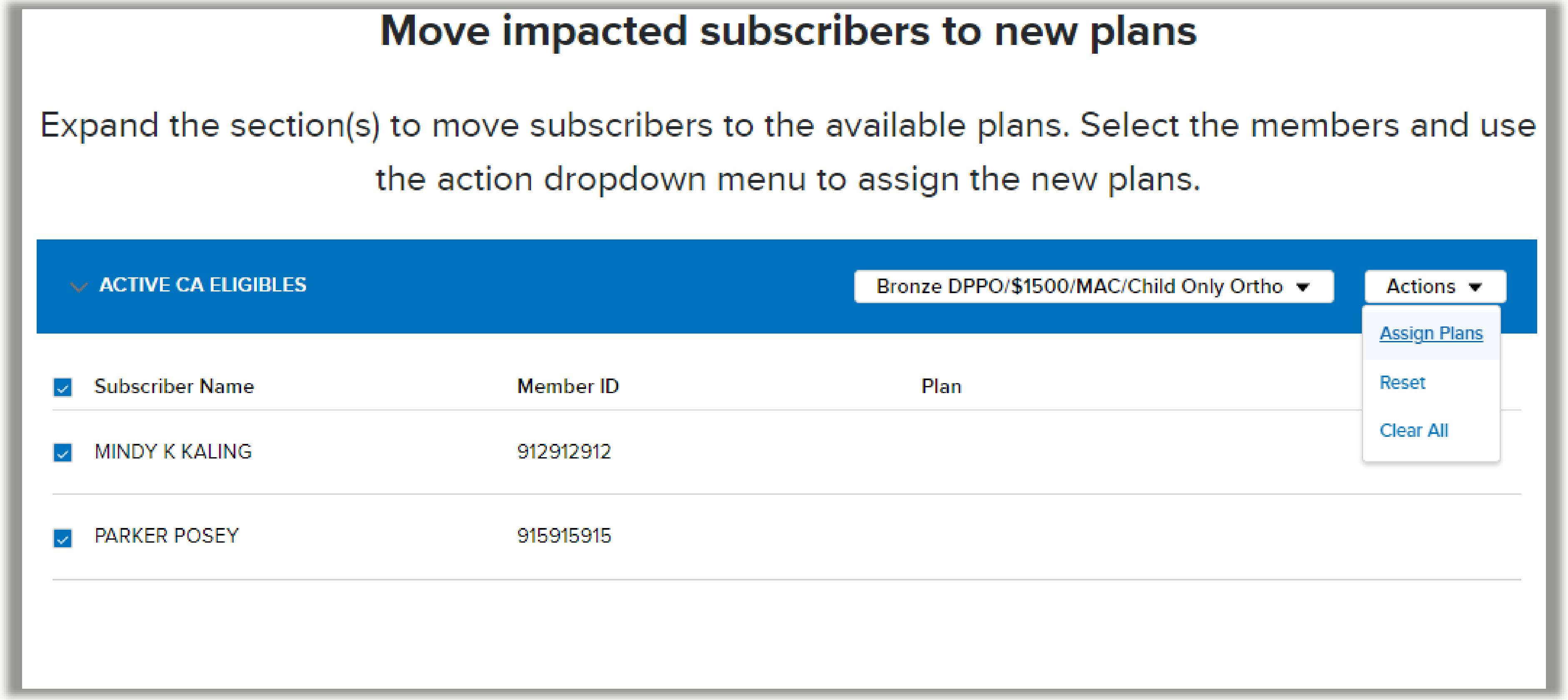


Note When you make off-cycle plan changes only those impacted by the change will be eligible for a Special Enrollment qualifying event. Refer to the Blue Shield Admin Guide for Special Enrollment details.

Bulk member plan changes

Open enrollment changes

How – Expand the class sections to view the full subscriber roster for the respective class plan. Check the box by the member or members' name to make their plan assignment. If multiple subscribers are moving to the same plan, check the boxes next to all names. Next, click on the Plan menu and select an available plan in the menu. Finally, click on the Action menu and select Assign Plans. Repeat these steps for all subscribers in the roster.

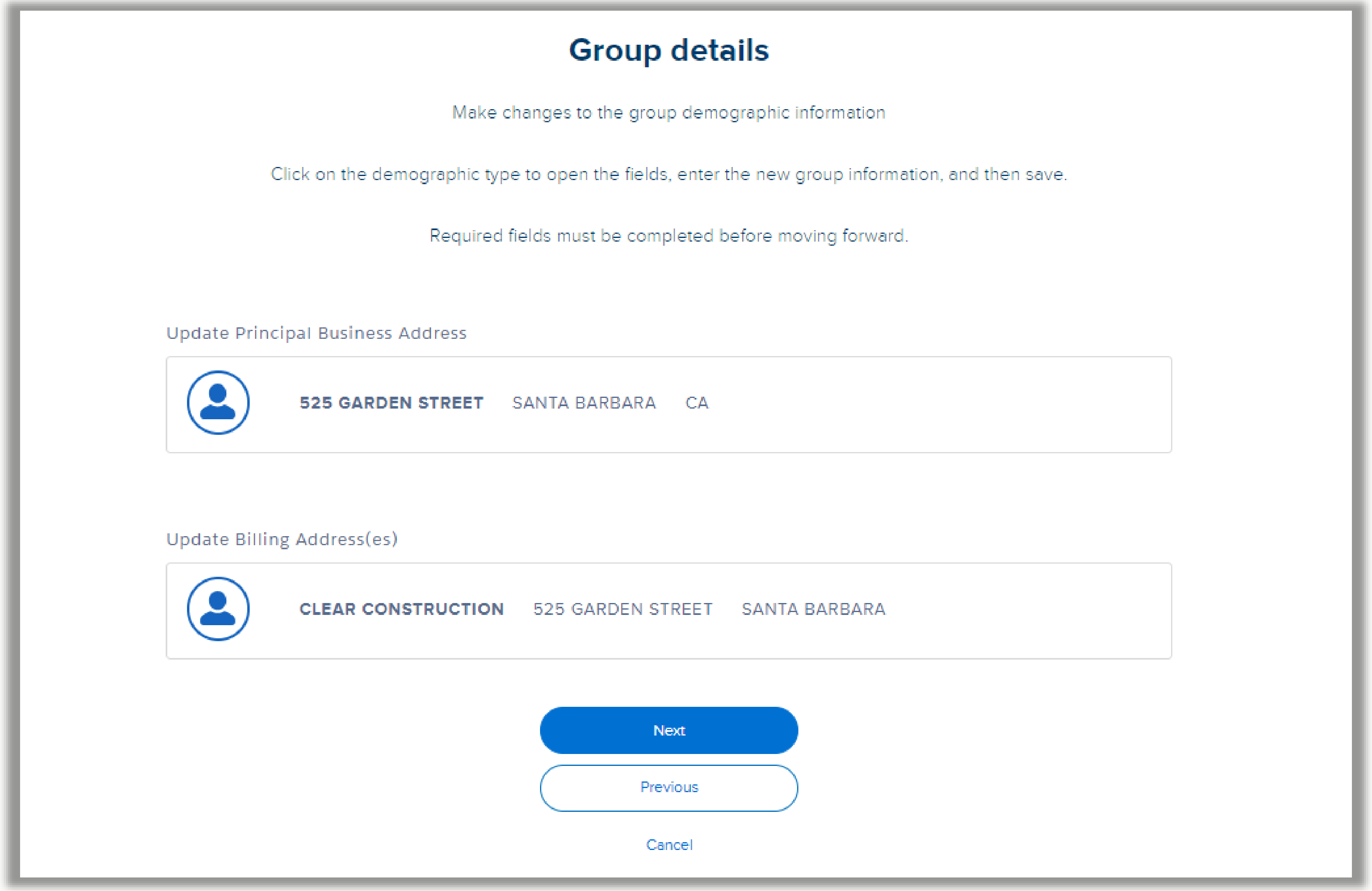


Note When you make open enrollment changes all subscribers are eligible for a Special Enrollment qualifying event. Refer to the Blue Shield Admin Guide for Special Enrollment details.

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.

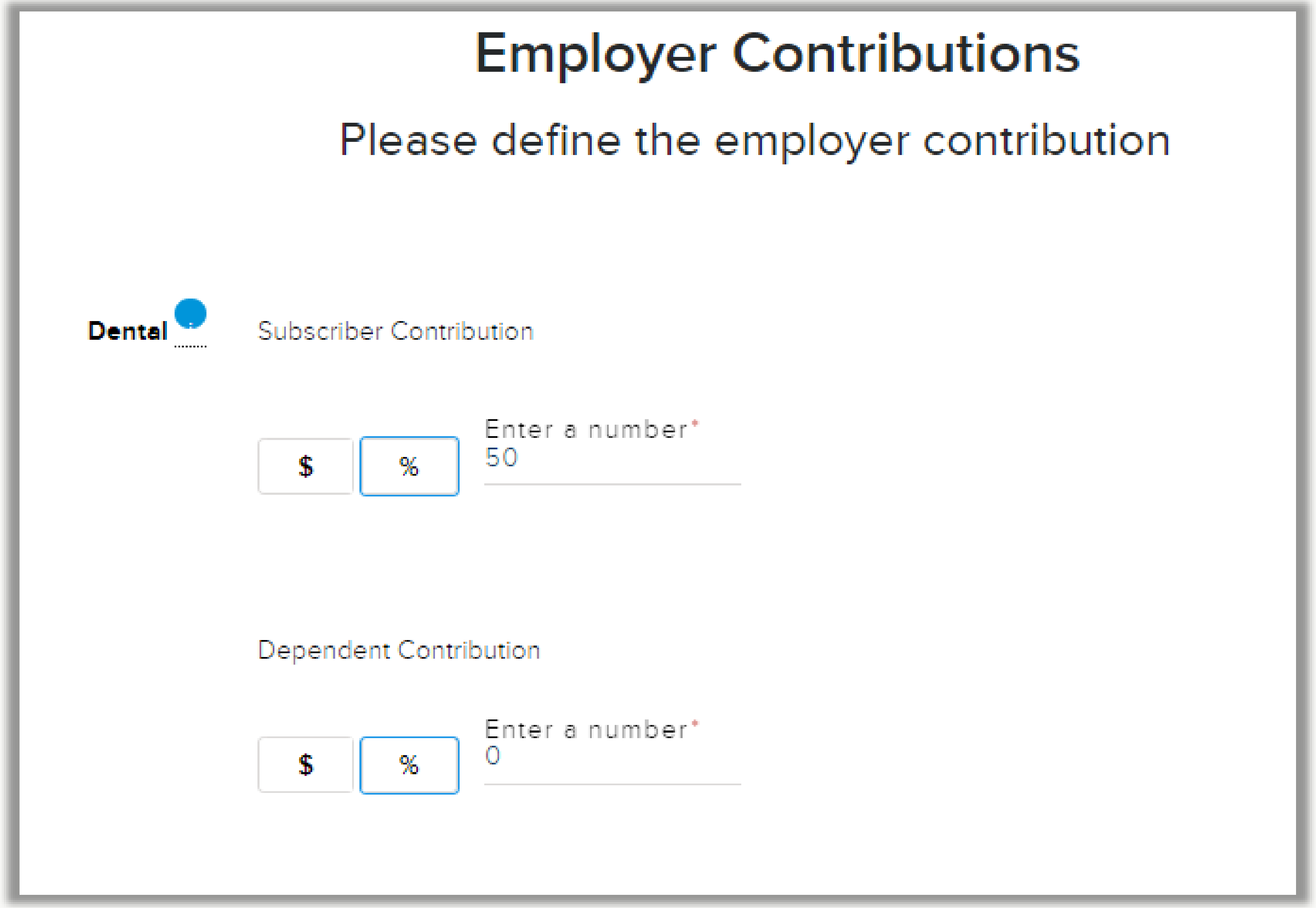


Note users cannot add new contacts this is just updating the ones that we are already associated to this group.

Employer contributions

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

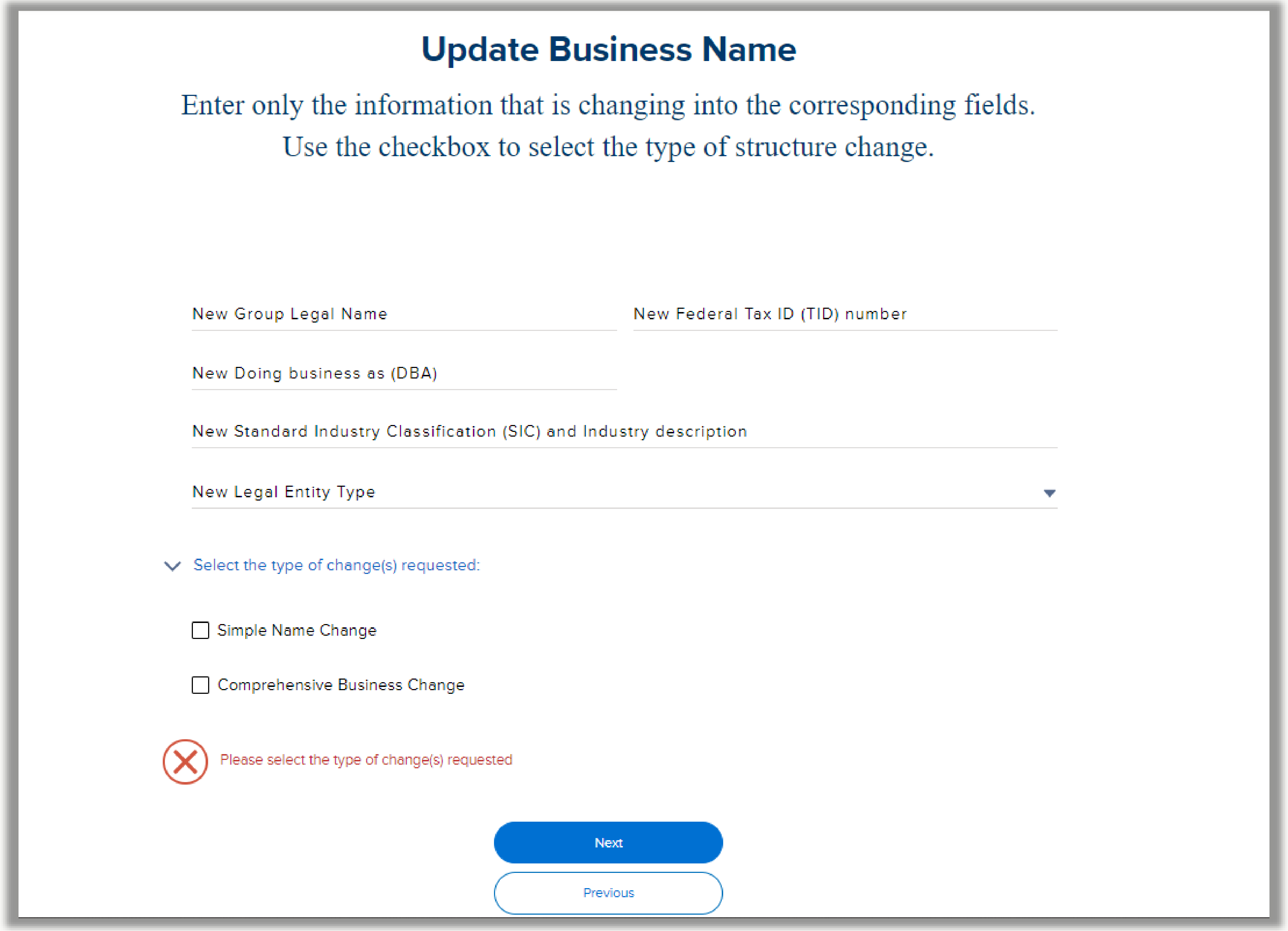
How – Use the checkboxes to select the offered products to make changes. Then select the checkbox to indicate if the contribution is a dollar amount or percentage amount and enter the desired amount.



Structure change

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

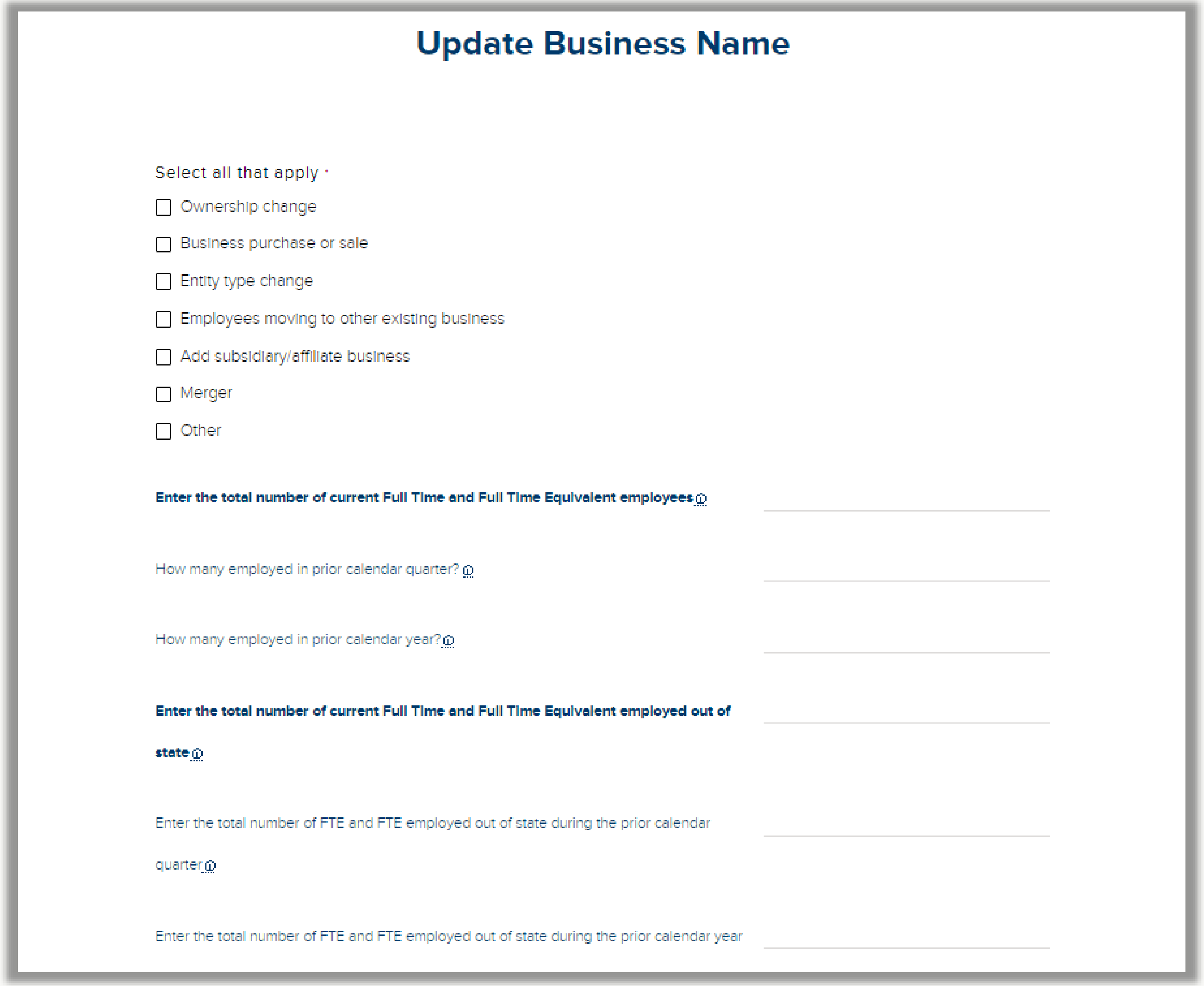
How – Enter in the new information into the respective fields. Use the check box to indicate the level of changes being submitted.



Structure change - complex

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

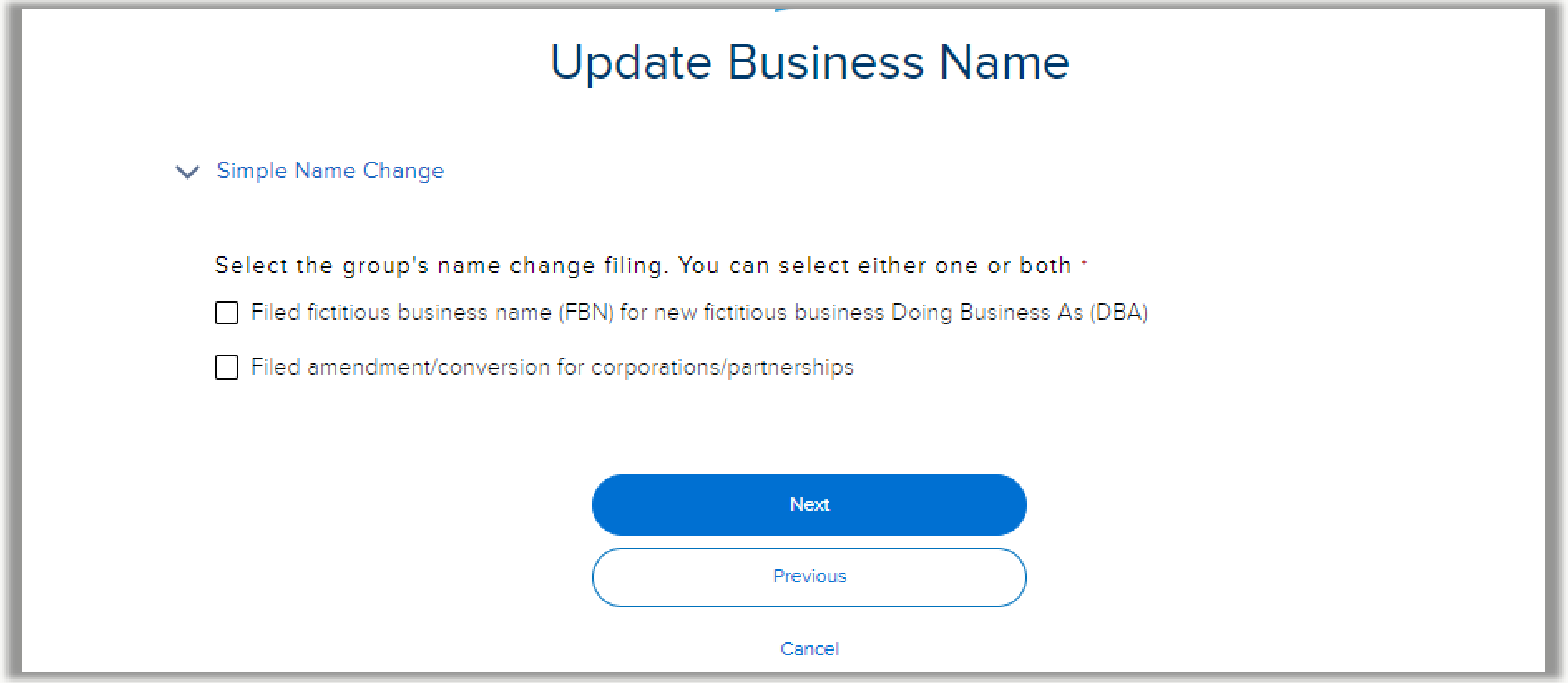
How – Check the box next to the type of change. Select multiple boxes for many changes.



Structure change - simple

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

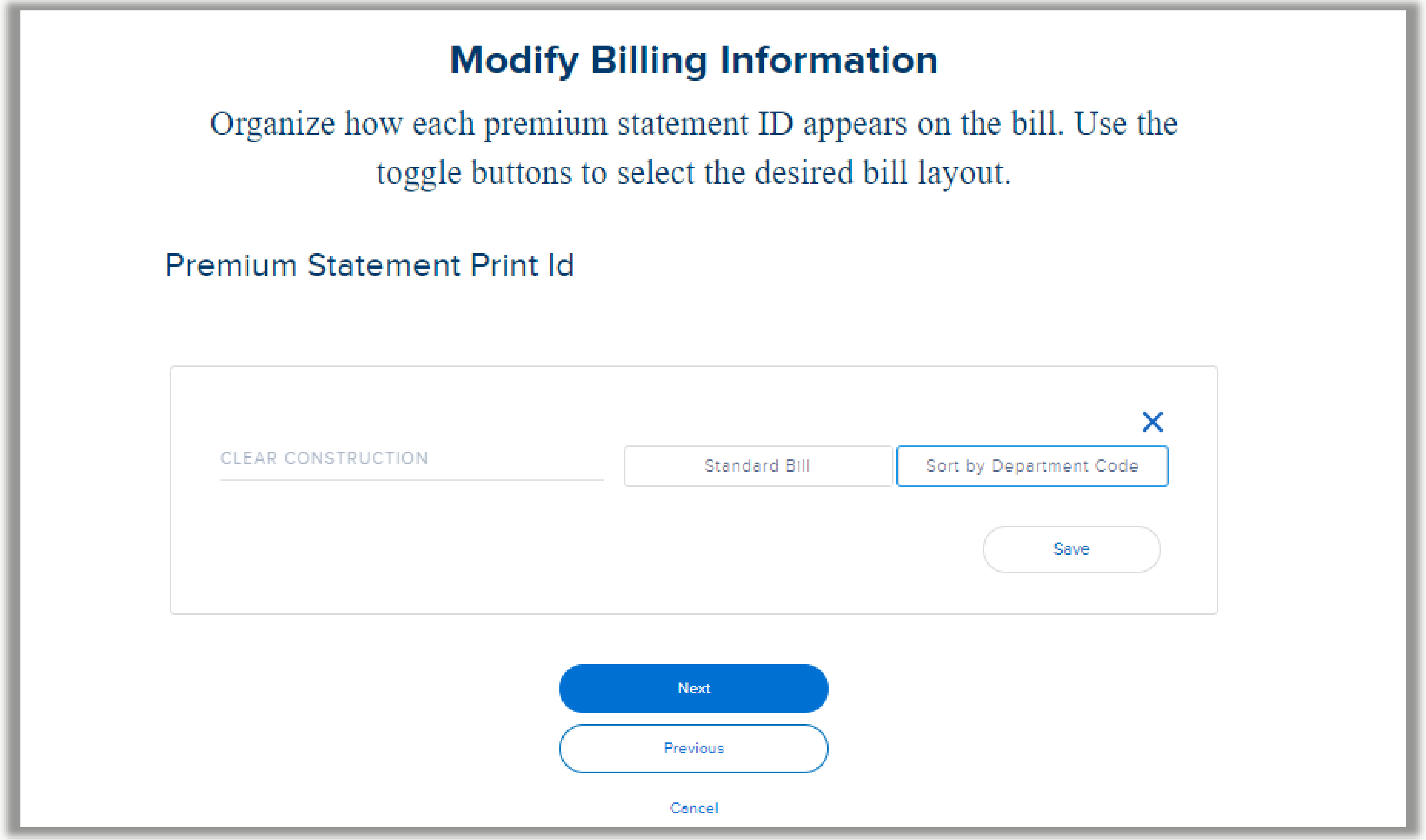
How – Check the box next to the type of change.



Billing attribute

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

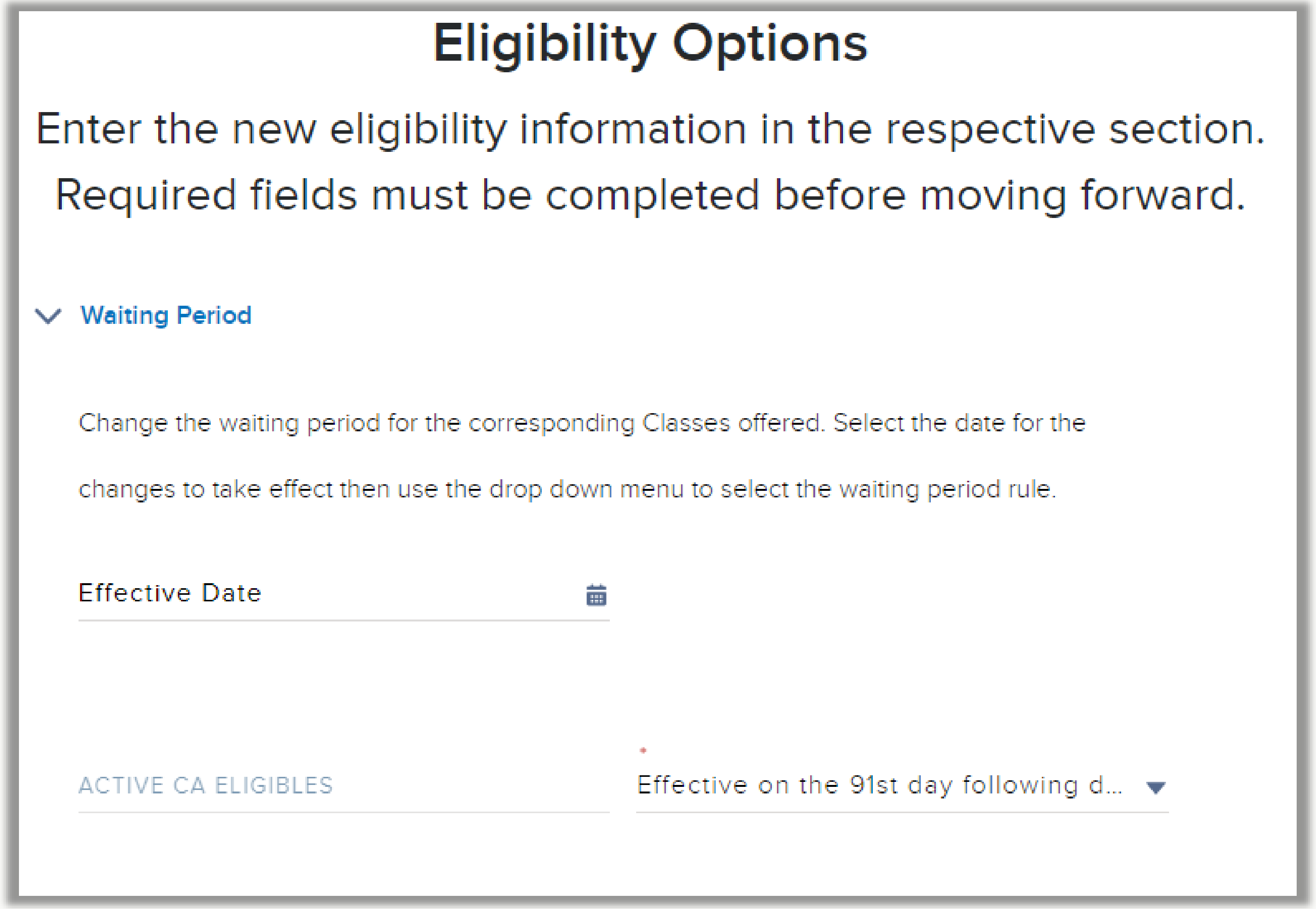
How – Use the toggle button to select the standard bill layout or the department code layout that organizes members by their department code.



Eligibility Options: waiting period

Use for – Small Group only. Update the waiting period rules for the offered class plans.

How – Enter the date you want the changes to start in the Effective Date field. Then use the dropdown menu to the right of the class plan to select the new waiting period rule.

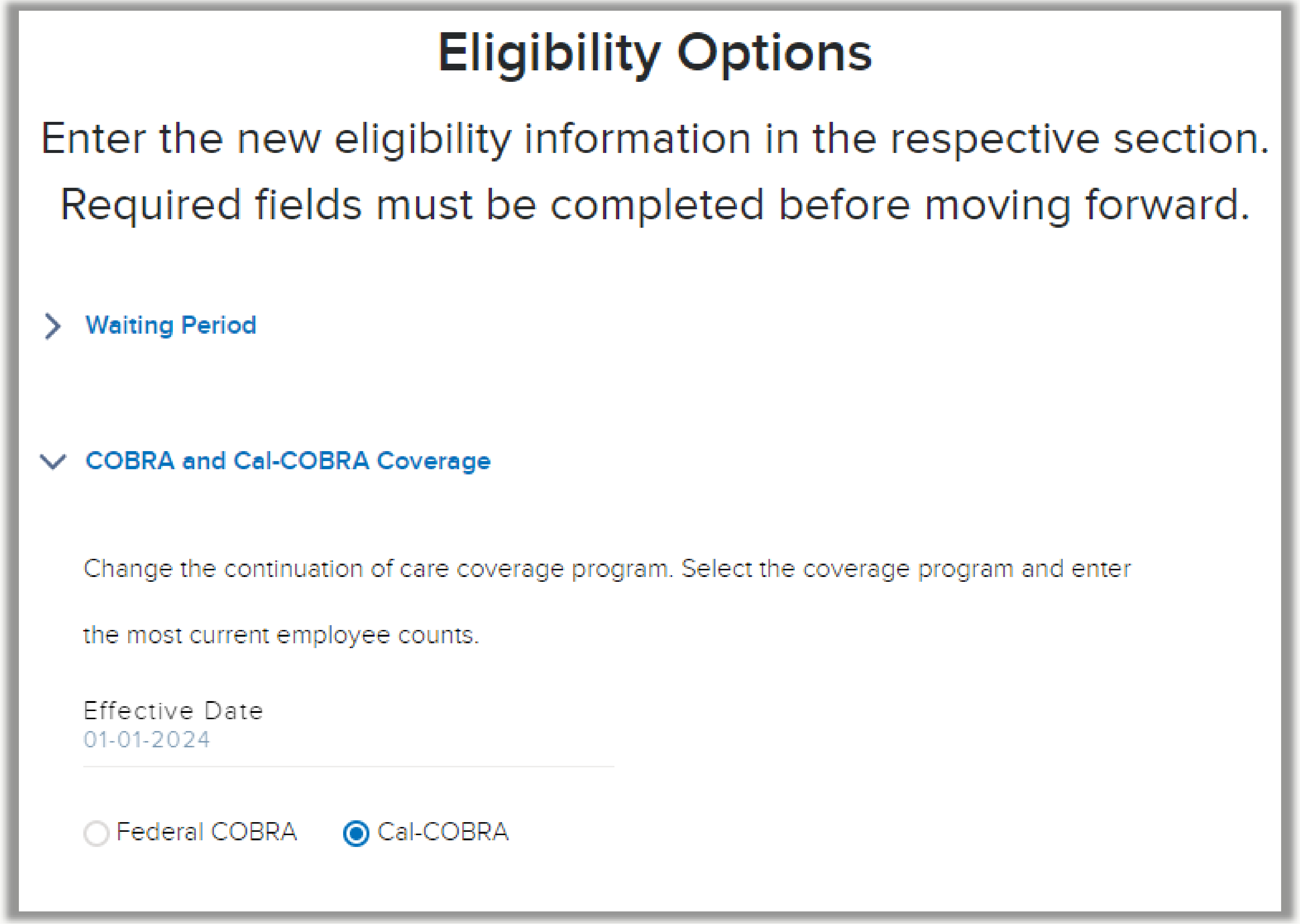


Note you do not need to reselect existing waiting period rules if they are not changing

Eligibility Options: continuation coverage

Use for – Small Group only. Update the continuation coverage program between federal COBRA and CalCOBRA.

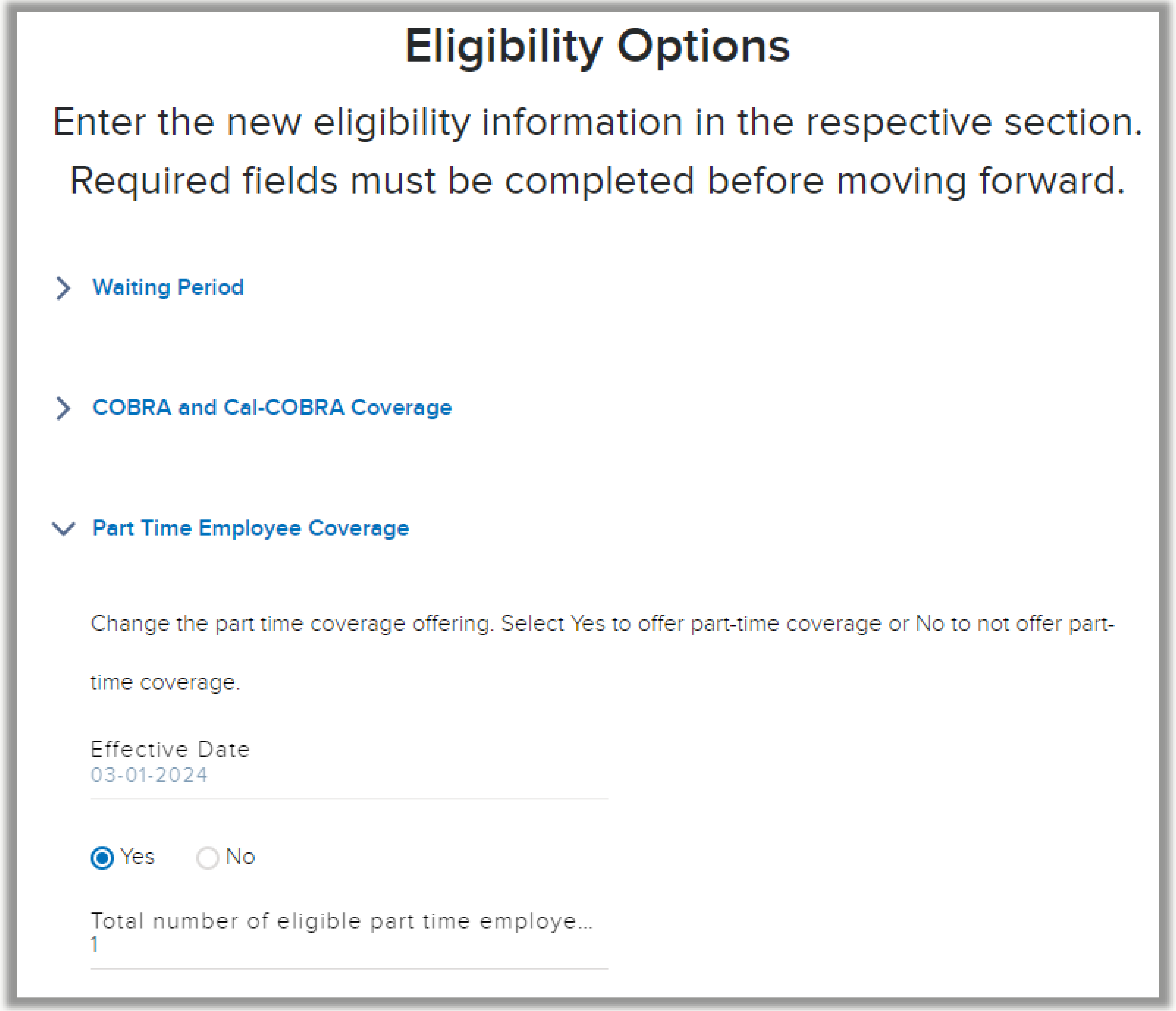
How – The effective date of change will always be the first of the year. Use the toggle button to select the continuation program and provide the eligible employee counts.



Eligibility Options: continuation coverage

Use for – Small Group only. Update the group contract to add or remove coverage for part time employees.

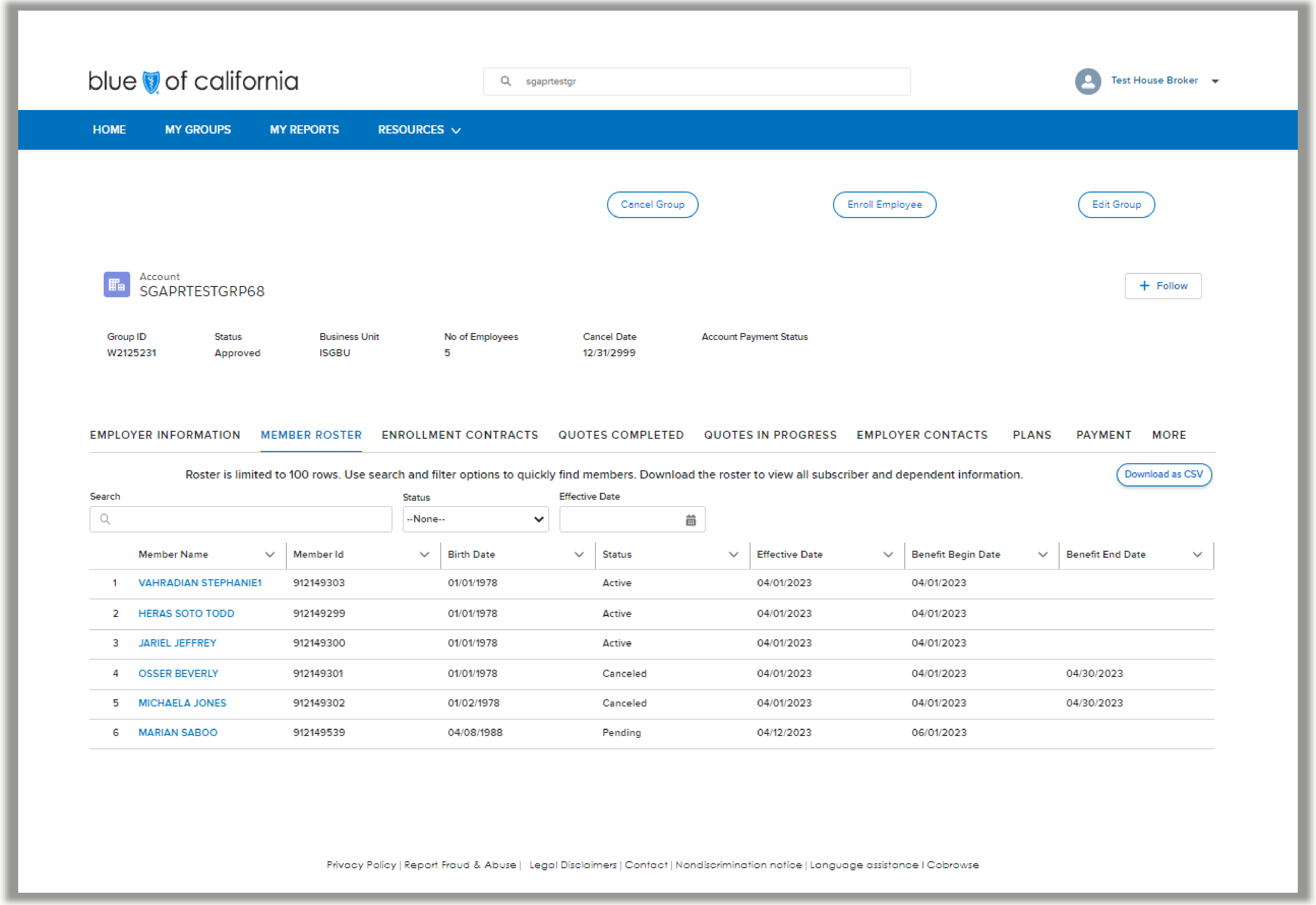
How – The effective date will always be the group's anniversary date. Use the toggle button to select Yes if covering part time employees and provide the eligible employee count. Select No to not cover part time employees.



Member level changes

Member maintenance

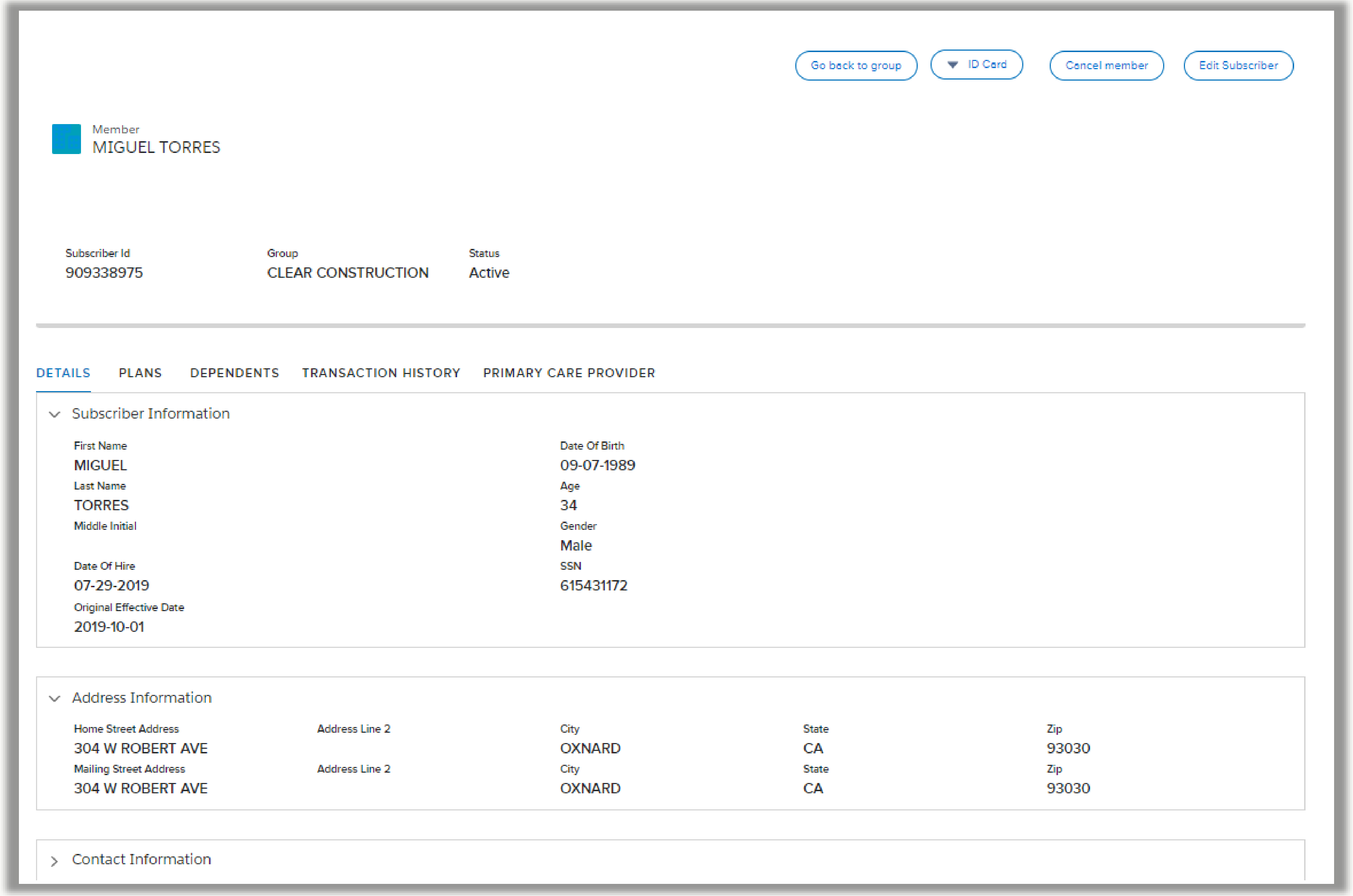
To initiate a member maintenance record change, find the group and then the member. Navigate to the Group Account page and click on the Member Roster tab. The tab displays the current contract period employees. Select an employee from the roster by clicking on the name.



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.



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.

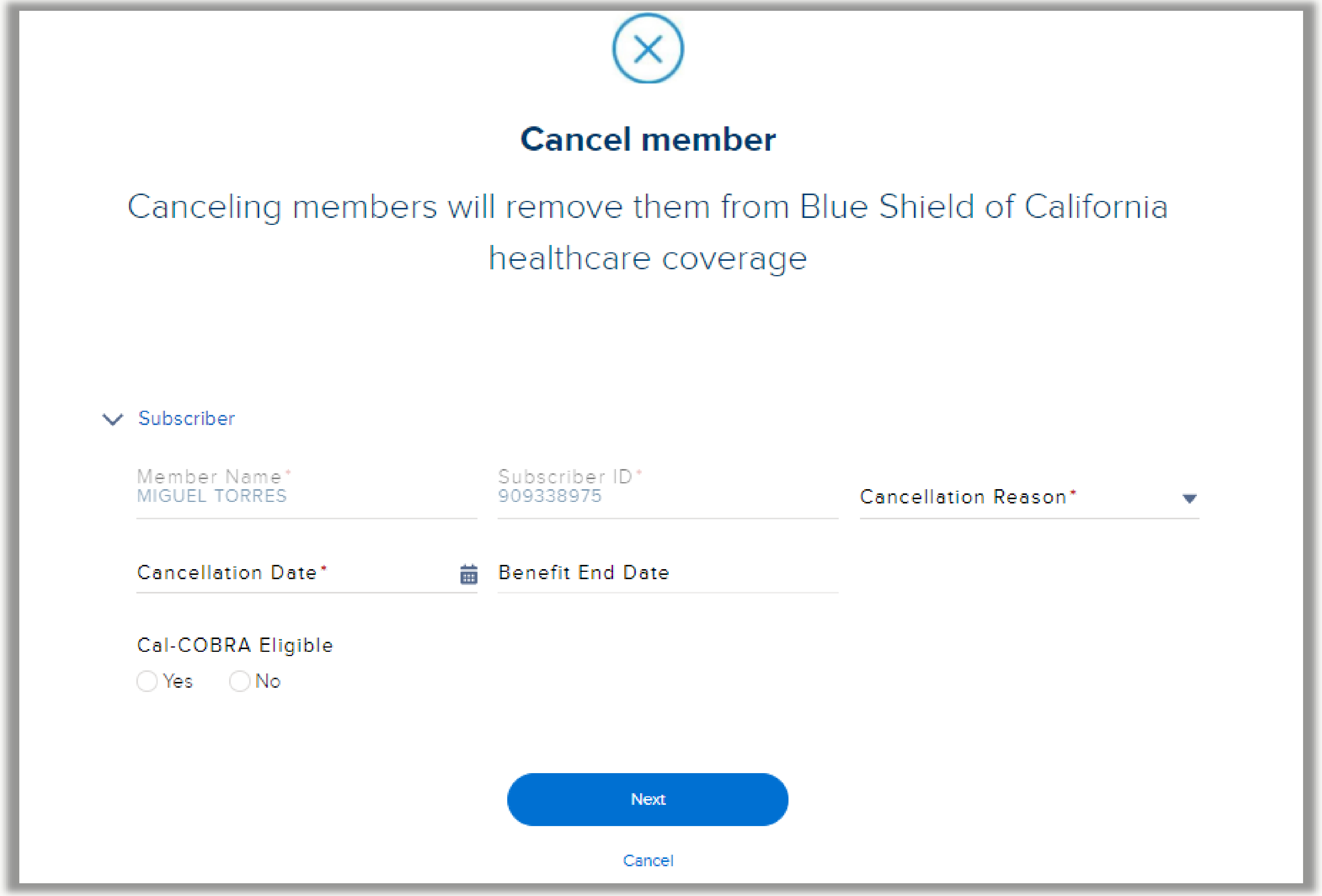
All

- Cancel member
- Reinstate member
- Order ID card
- Download ID card
- Member demographics
- Member contact
- Member plans
- Add dependent(s)
- COBRA enrollments
- Dependent cancelation /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.

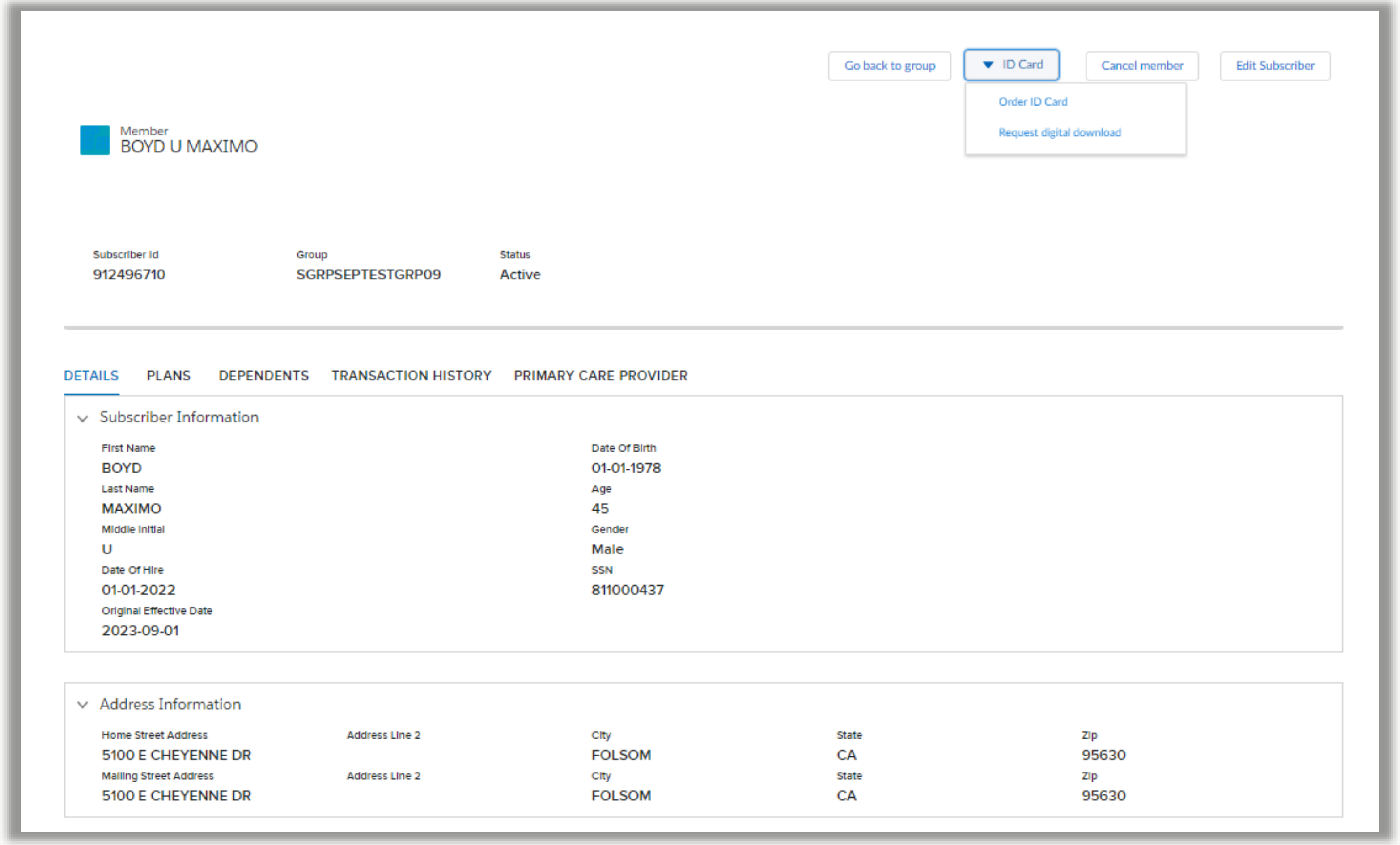


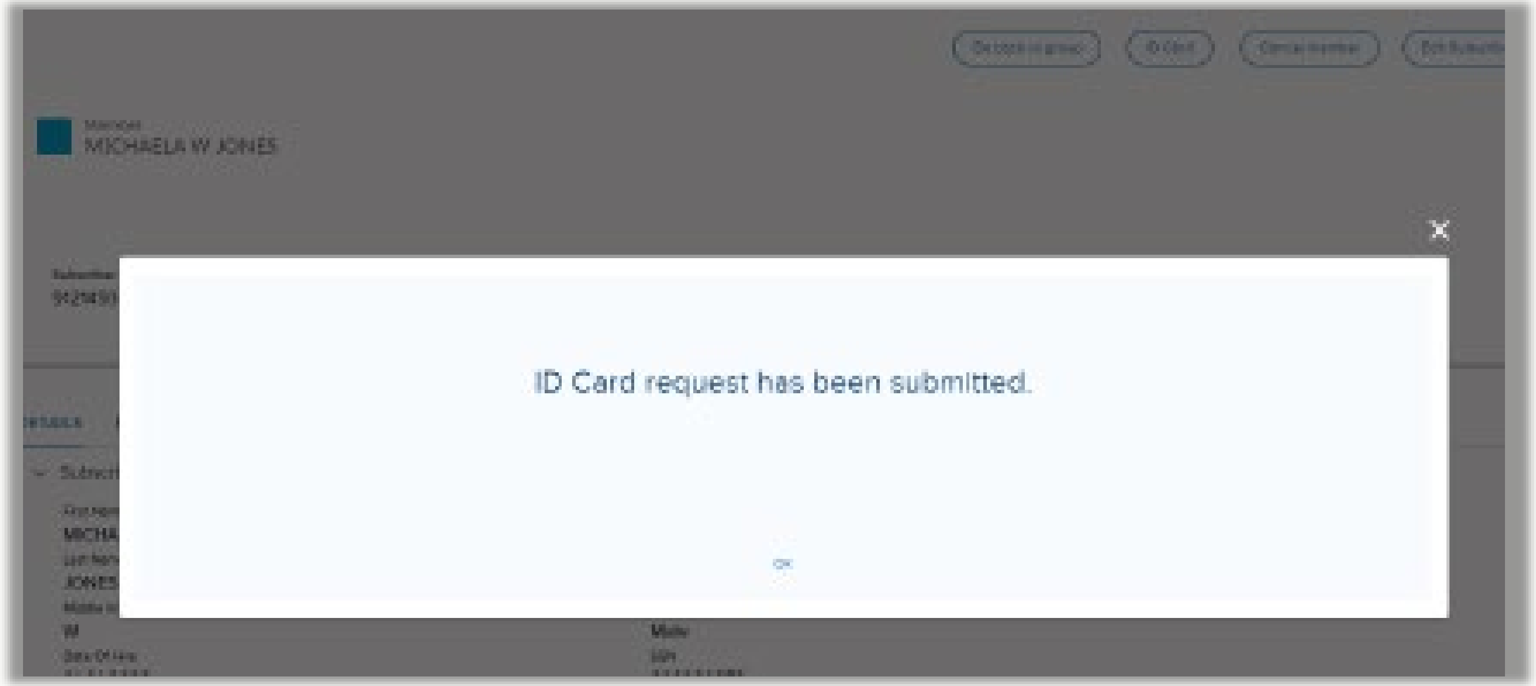
Order ID cards

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.



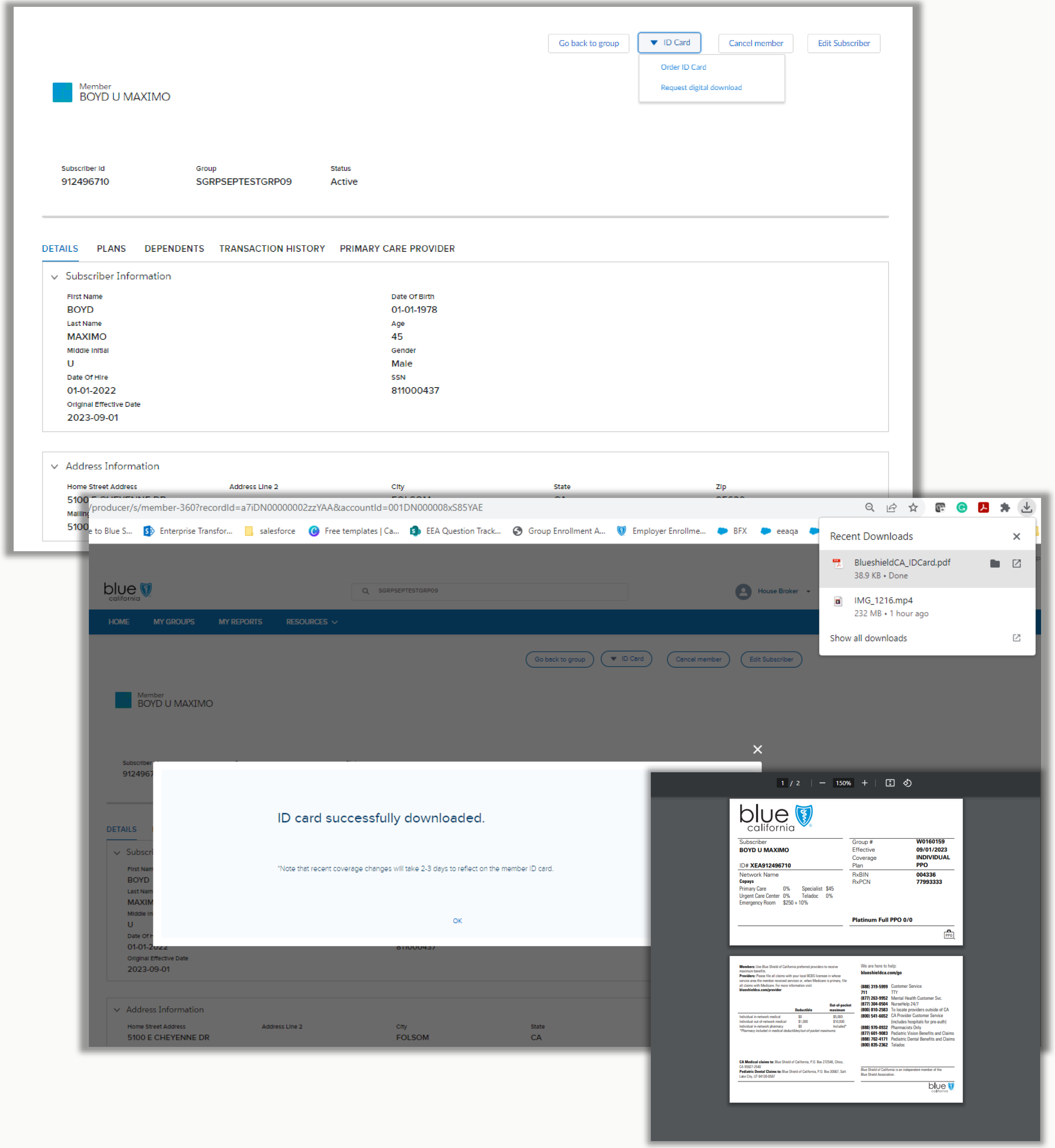


Download ID cards

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.

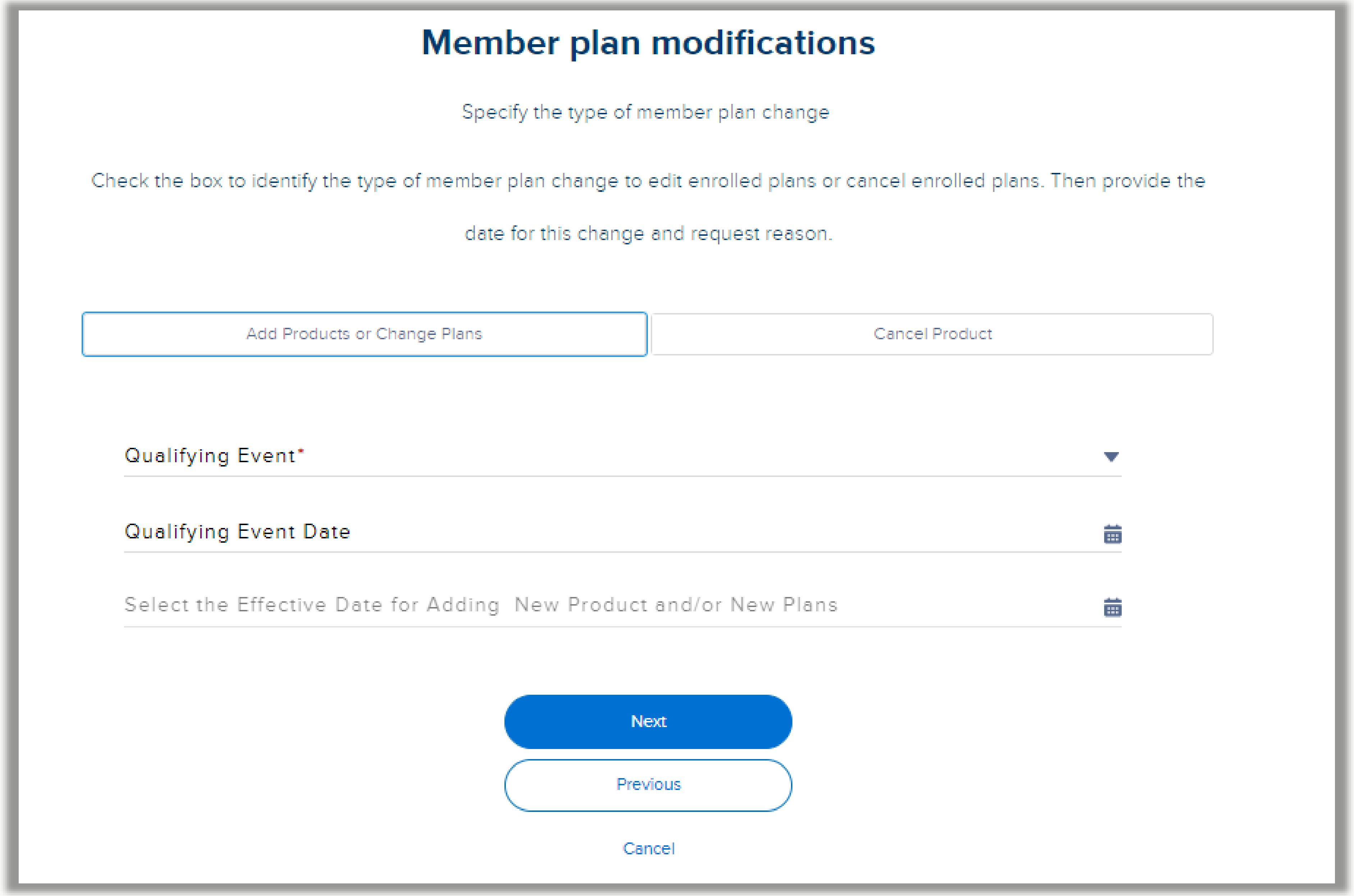


Member plan changes

Use for – Member plan changes to products and plans.

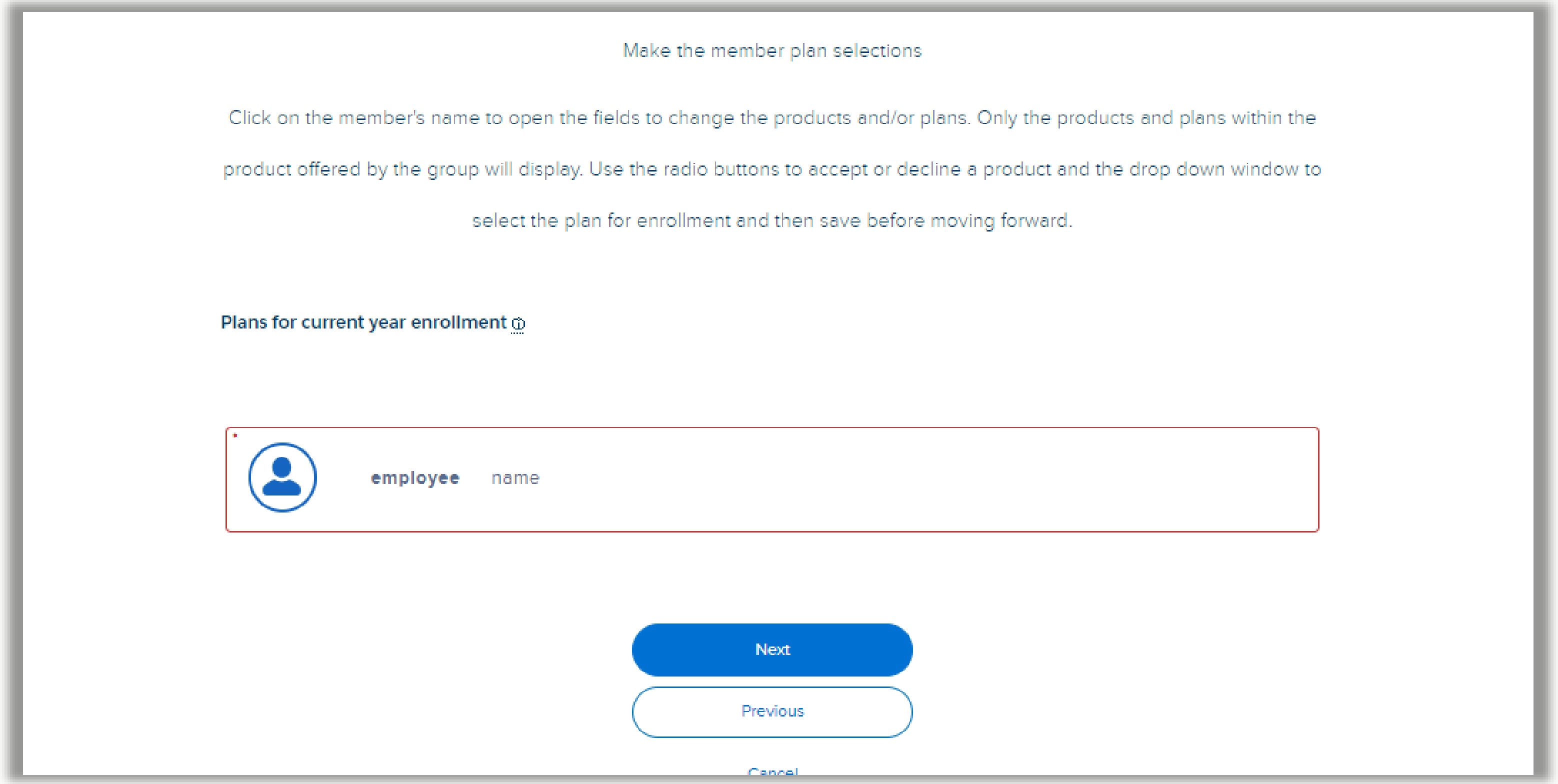
How - This transaction has a two-screen workflow.

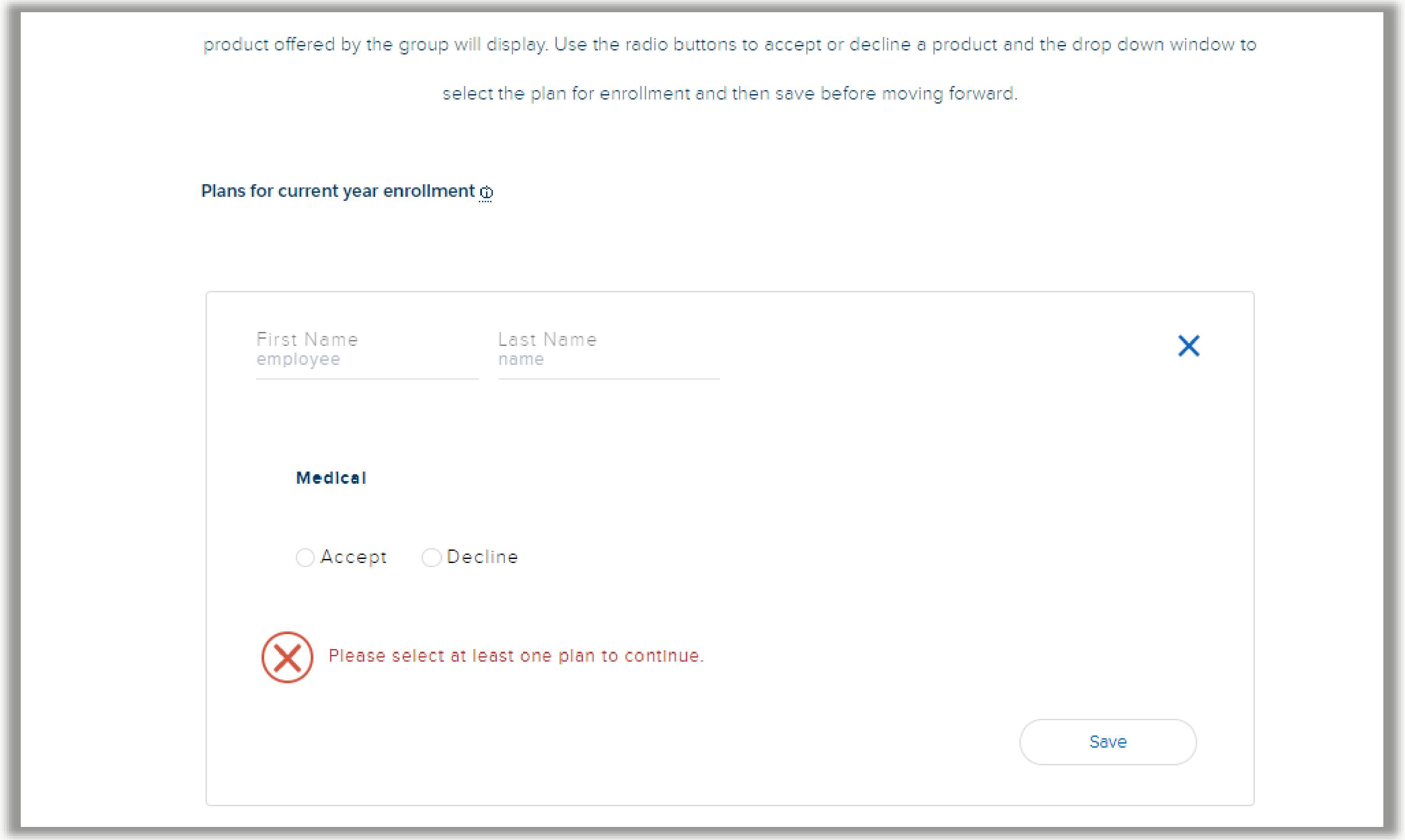
1) Identify the type of change with the toggle button, enter the effective date, and qualifying event information.



Member plan 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.



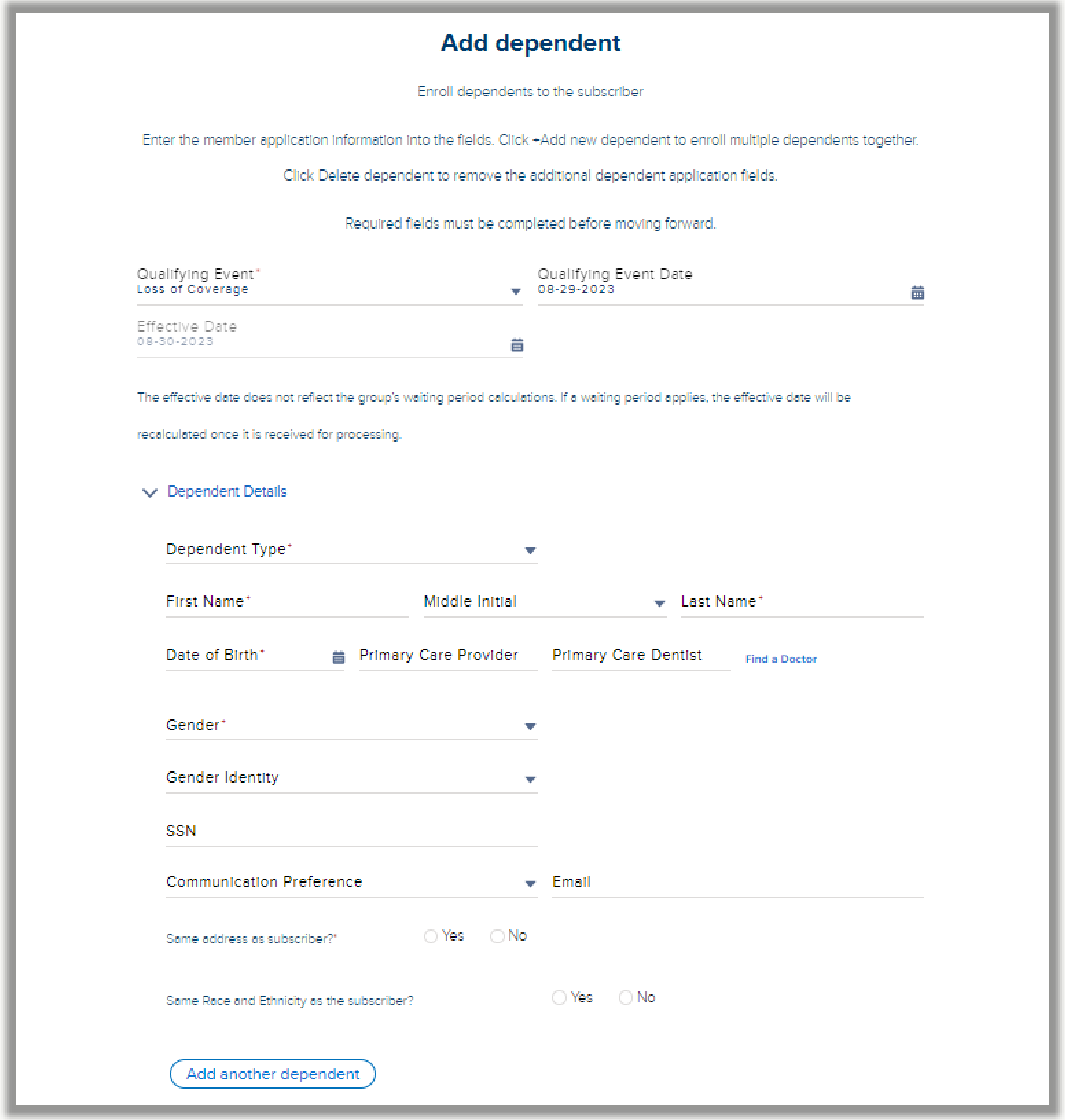


Add dependents

Use for – enroll dependents to an existing subscriber.

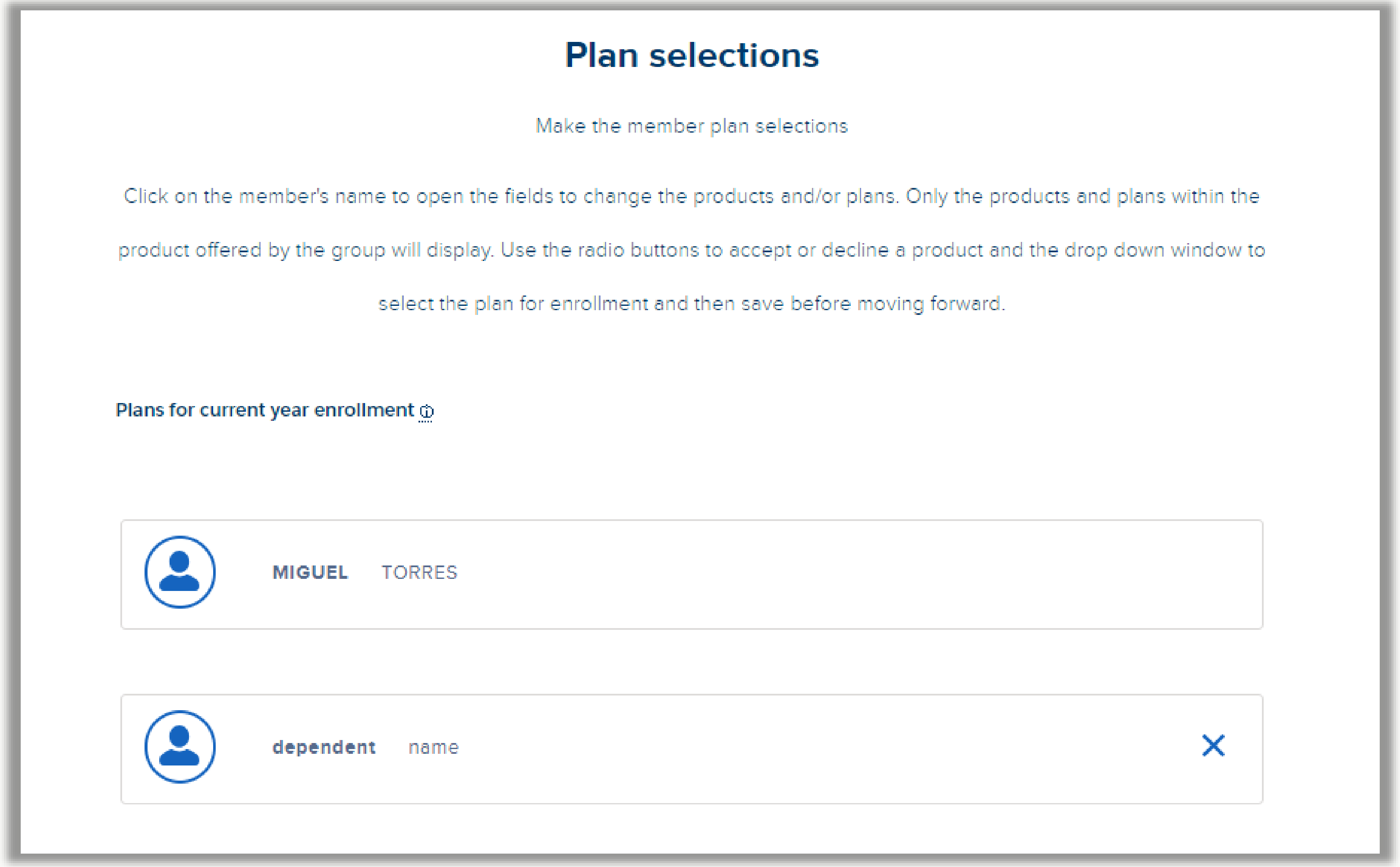
How – This transaction has a two-screen workflow. These are the same fields as the EEA form.

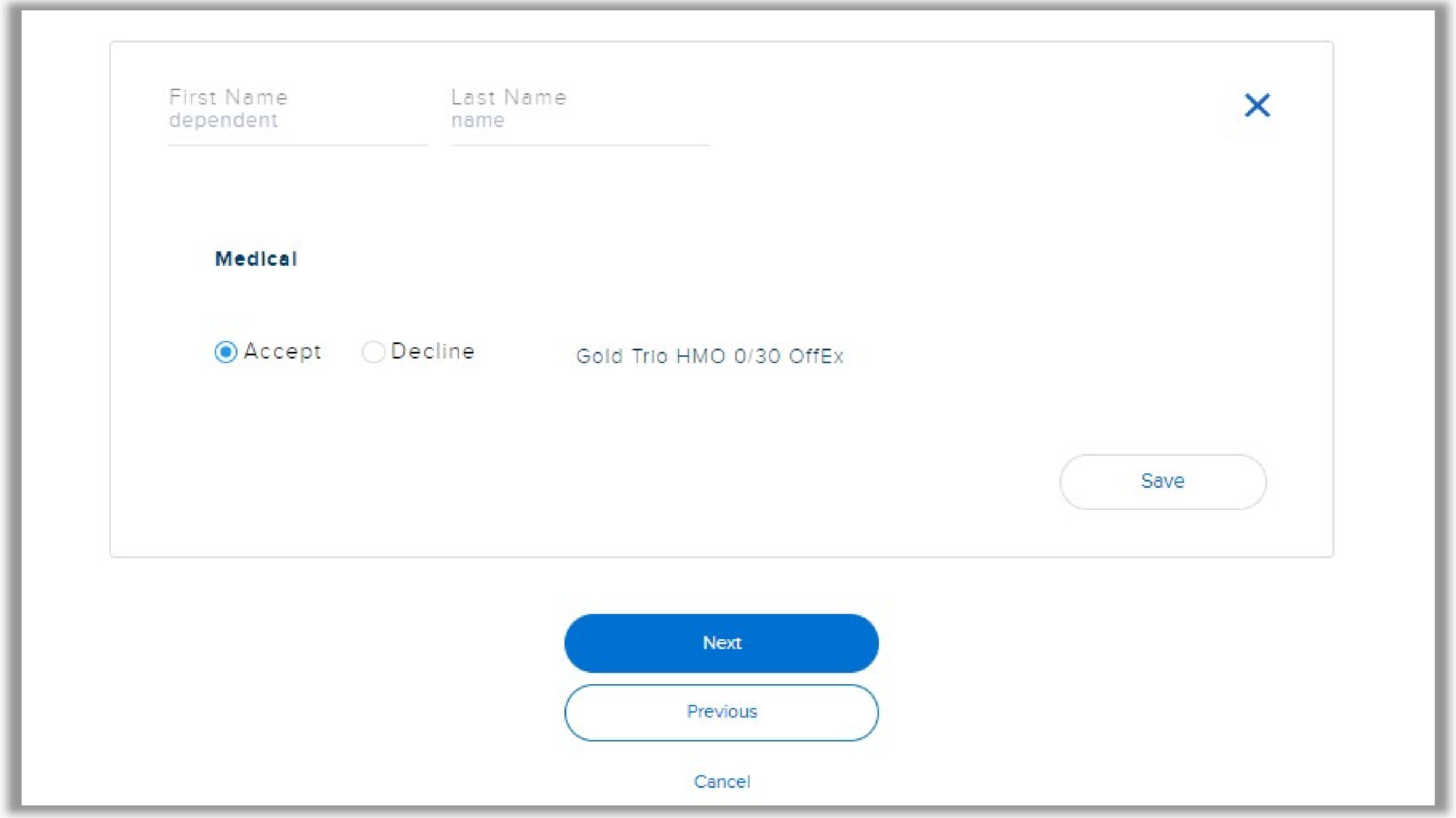
1) Enter the enrollment application information by directly typing into the fields.



Add 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.

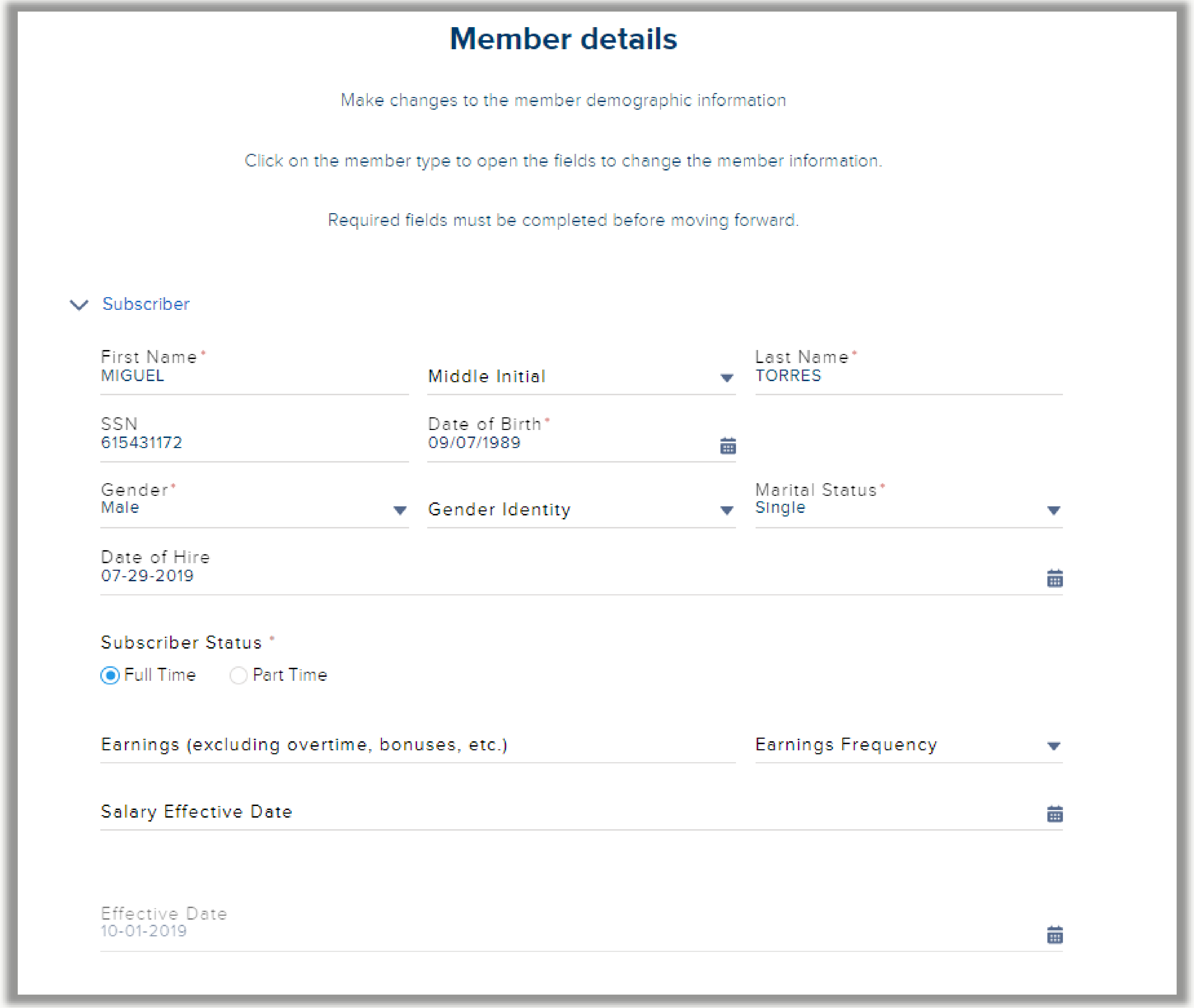




Member details

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.

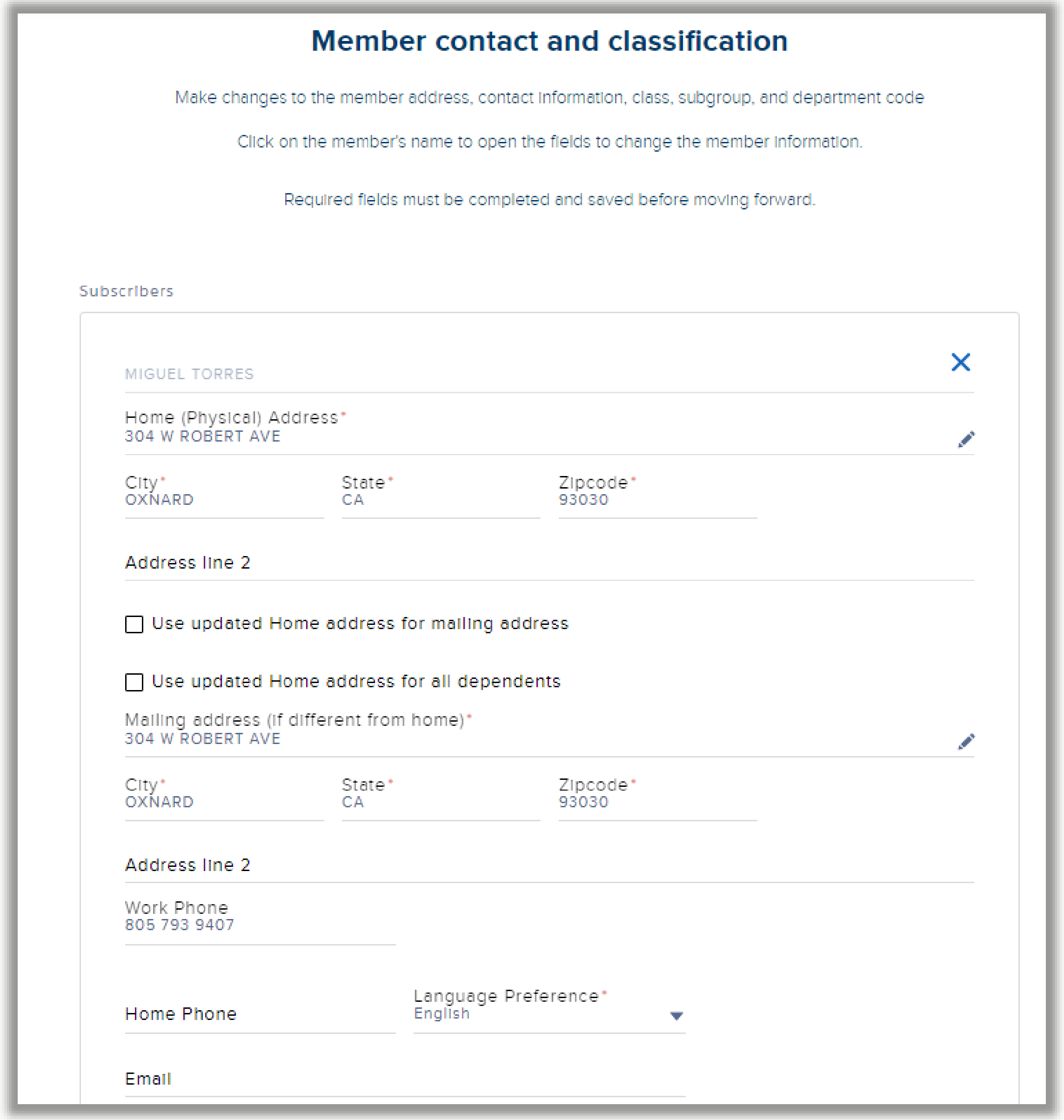


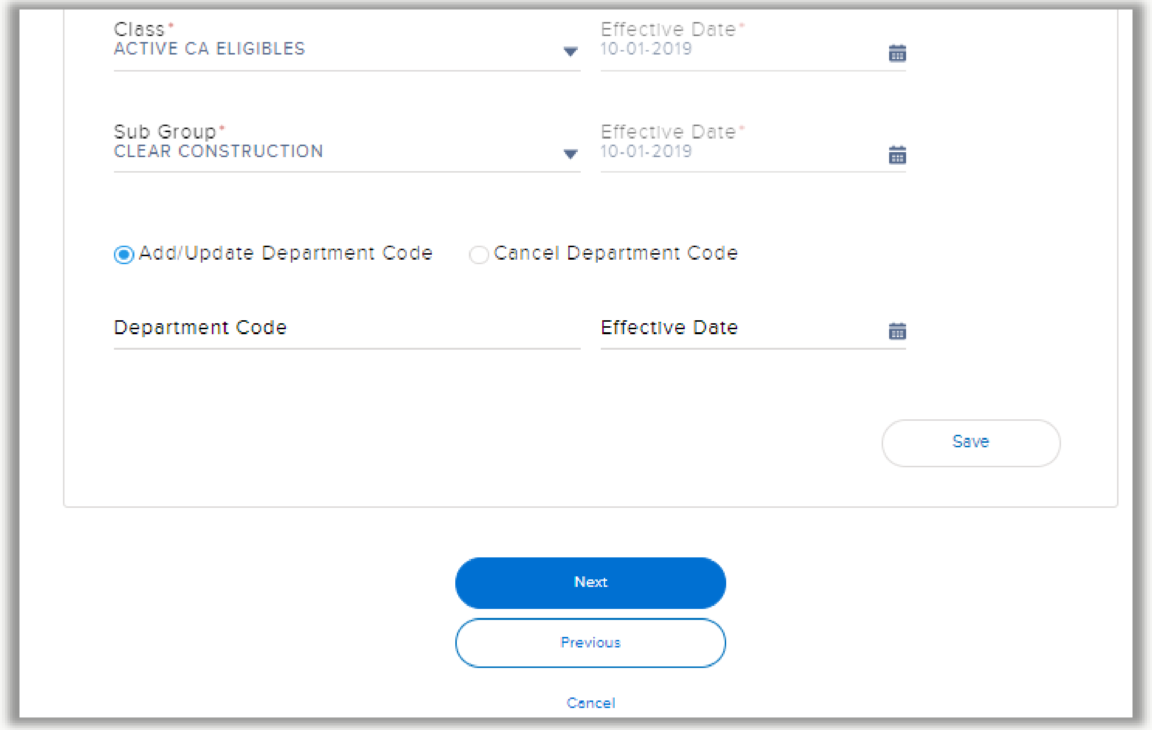
Member contact & classification

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

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.

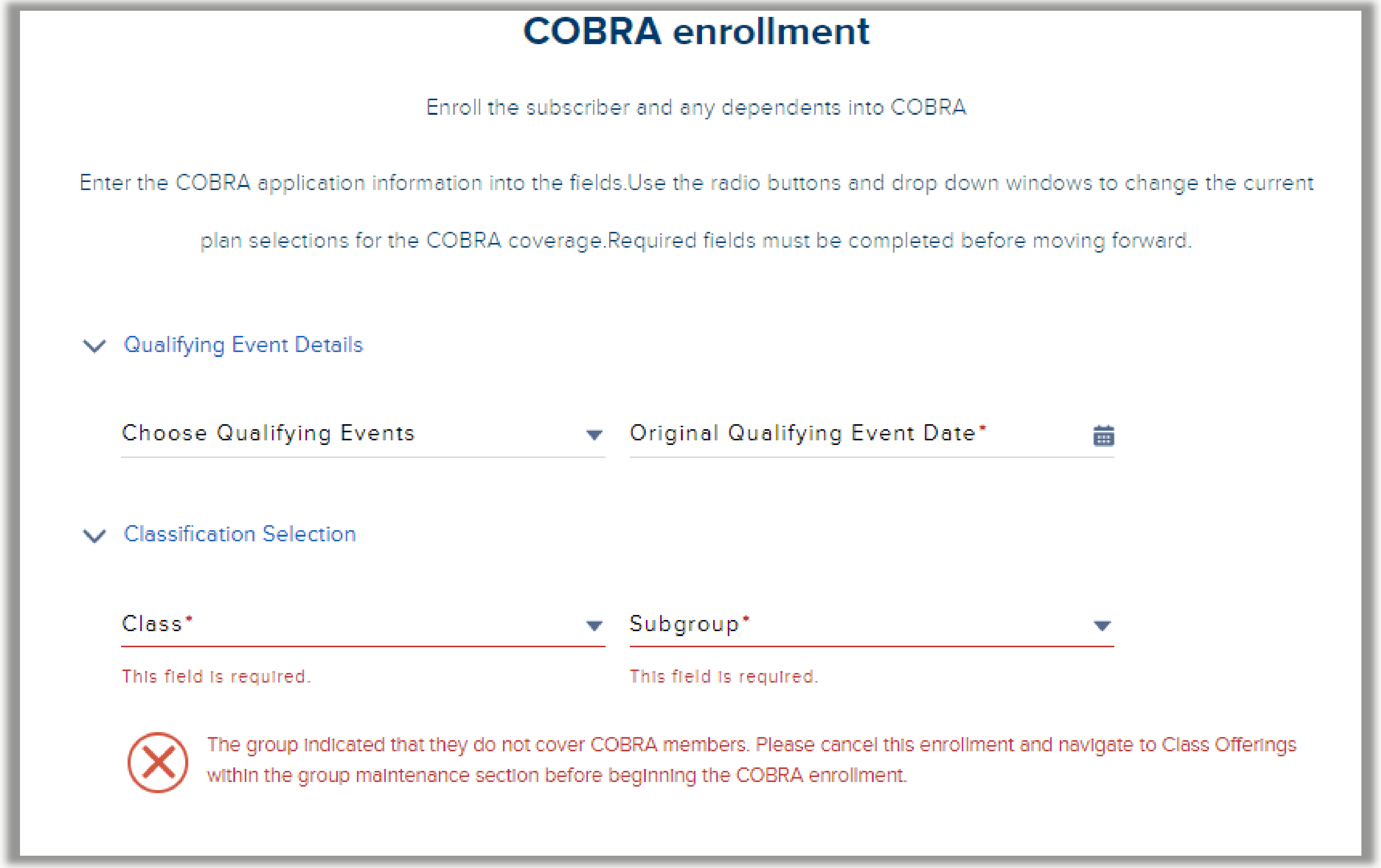




Federal COBRA enrollment

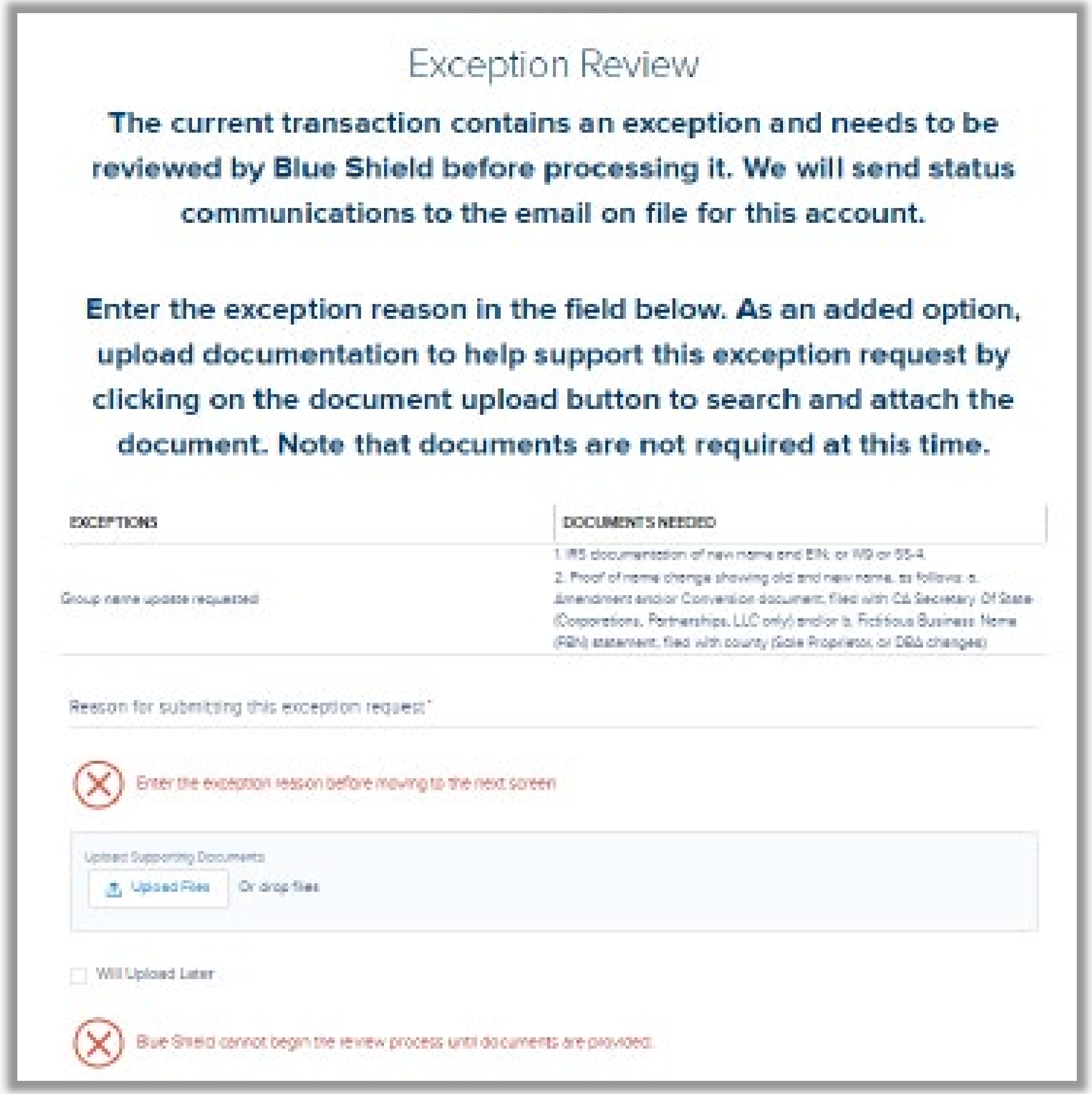
Use for – Enroll an existing subscriber in COBRA.

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.



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



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 s o
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 tool resources on Broker 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