

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

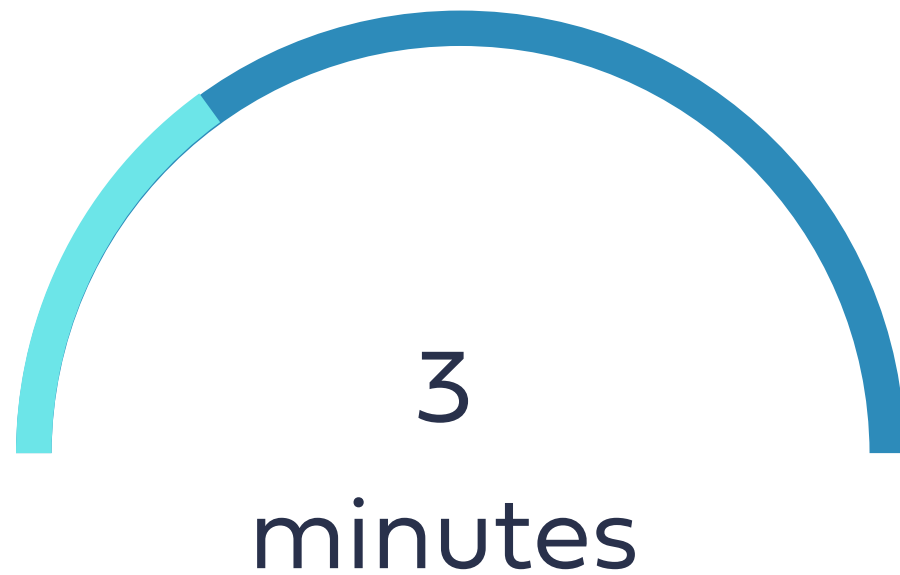


Simple submissions

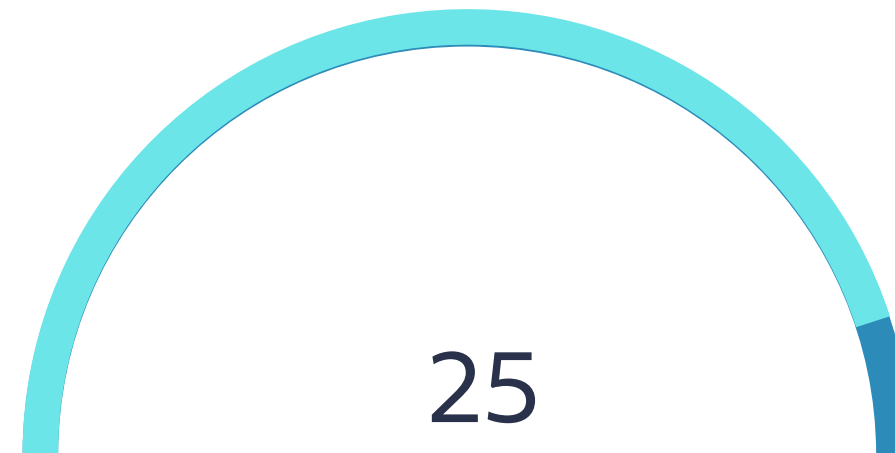
Guided workflows direct you through each step of the process

Experience easy enrollments yourself

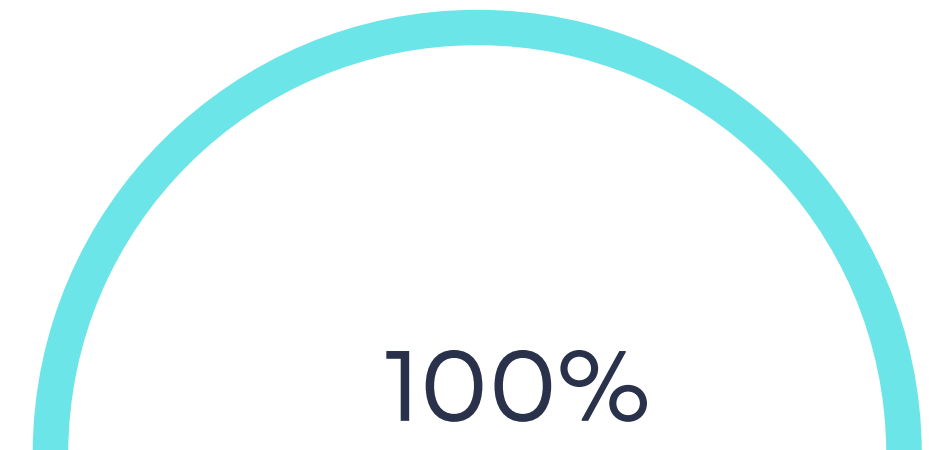
Expected installation of
new hire enrollment



Features available in
one tool



Tool submissions with
self-service status
tracking



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

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

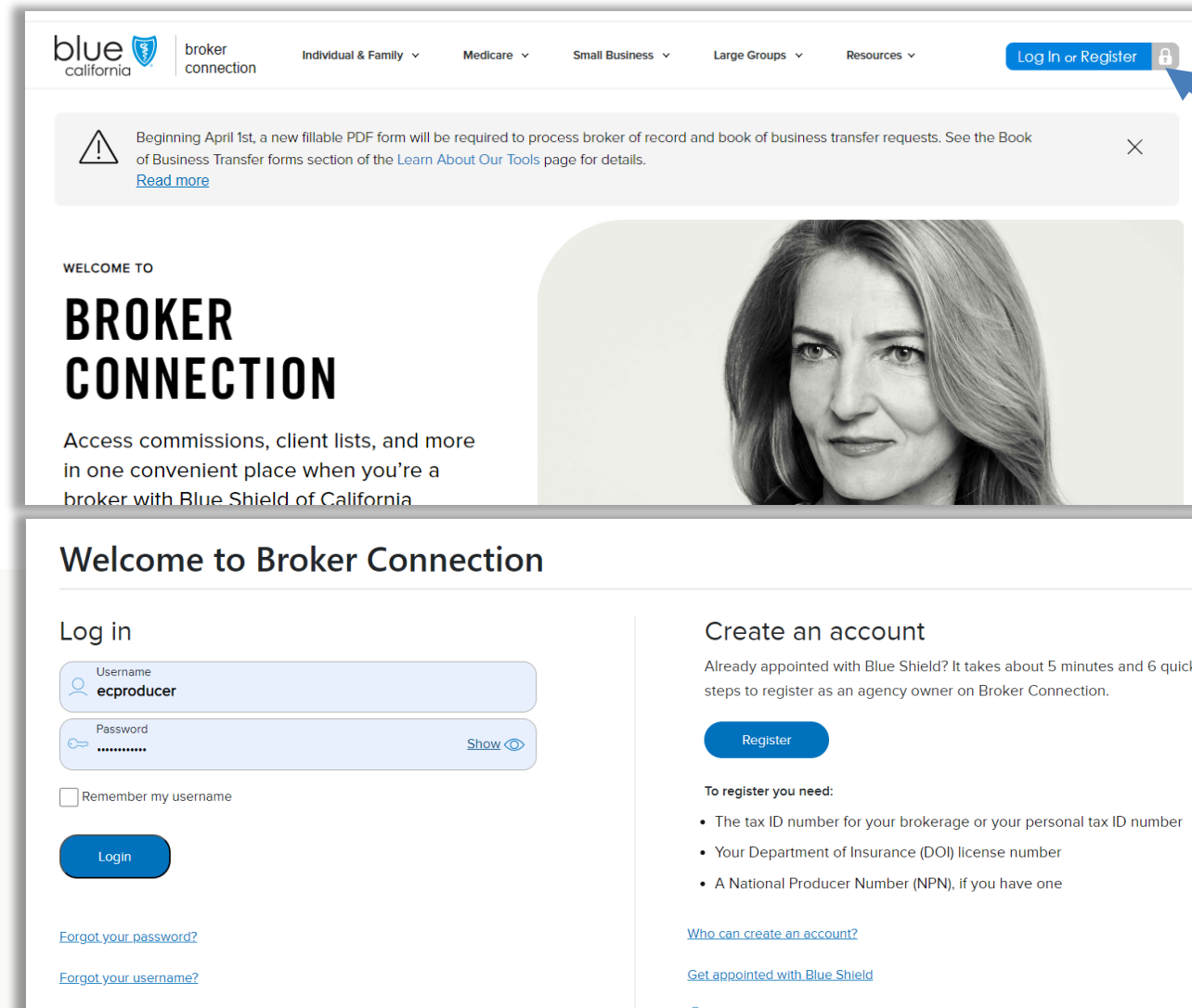
- Cancel a group
- Enroll employees
- Edit group address and contact information
- Edit group contribution amounts
- Edit group contacts
- Edit bill format
- Edit group name
- Edit group entity information
- Add a group class
- Add a plan or product
- Cancel a plan or product
- Bulk member cancelation



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

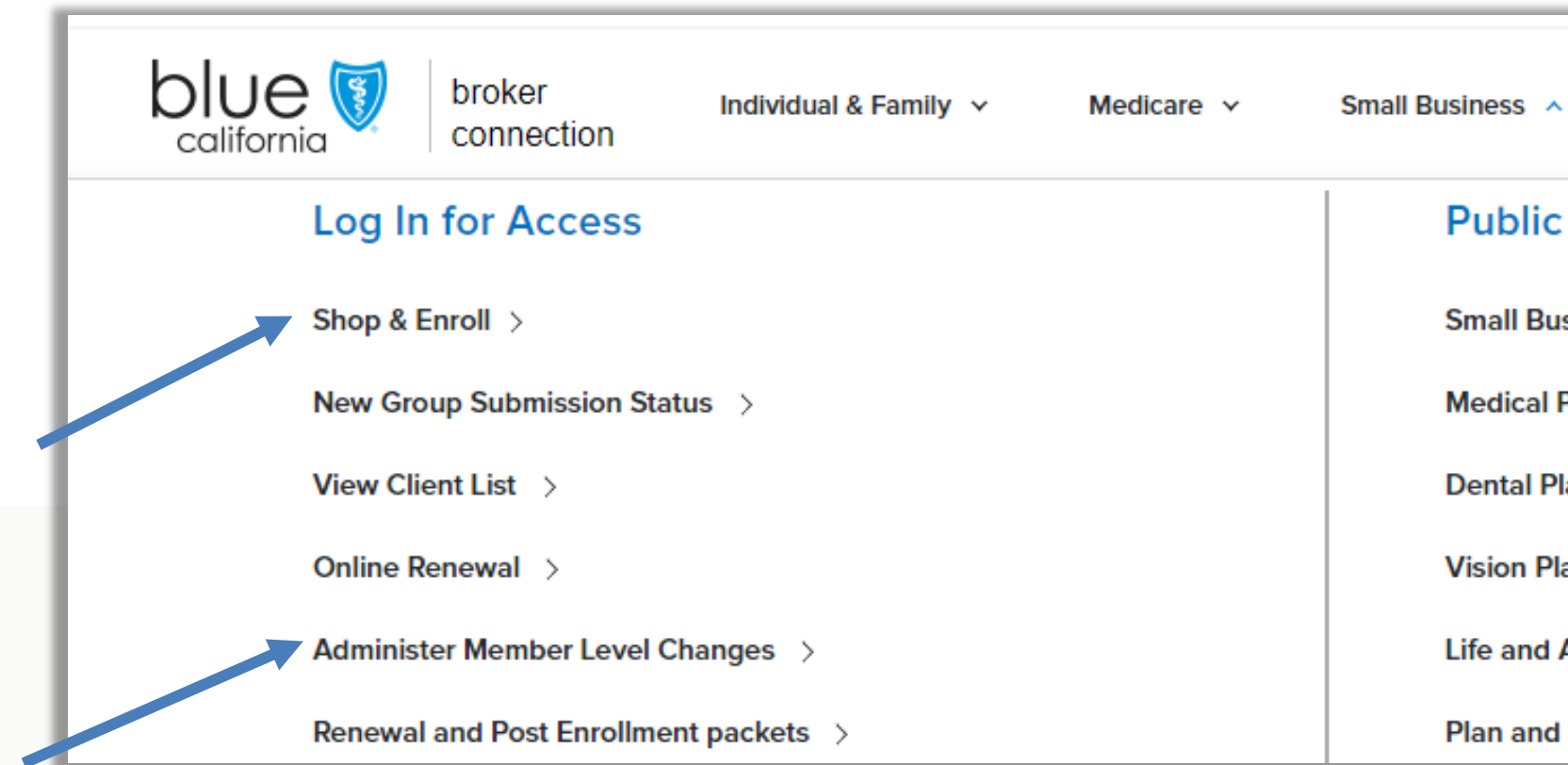


The screenshot shows the Blue Shield of California Broker Connection website. At the top, there is a navigation bar with the Blue Shield logo, 'broker connection', and several menu items: 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. On the far right of the navigation bar is a blue button labeled 'Log In or Register' with a lock icon. A blue arrow points to this button. Below the navigation bar is a light gray banner with a warning icon and text: 'Beginning April 1st, a new fillable PDF form will be required to process broker of record and book of business transfer requests. See the Book of Business Transfer forms section of the [Learn About Our Tools](#) page for details. [Read more](#)'. Below the banner is a large section titled 'WELCOME TO BROKER CONNECTION' with a sub-header 'Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California.' To the right of this text is a portrait of a woman. Below this section is a 'Welcome to Broker Connection' header. Underneath, there are two main sections: 'Log in' and 'Create an account'. The 'Log in' section has fields for 'Username' (with the text 'ecproducer') and 'Password' (with a 'Show' button and an eye icon). Below these fields is a checkbox for 'Remember my username' and a 'Login' button. There are also links for 'Forgot your password?' and 'Forgot your username?'. The 'Create an account' section has a 'Register' button and text stating 'Already appointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner on Broker Connection.' Below this are three bullet points: 'The tax ID number for your brokerage or your personal tax ID number', 'Your Department of Insurance (DOI) license number', and 'A National Producer Number (NPN), if you have one'. There are also links for 'Who can create an account?' and 'Get appointed with Blue Shield'.

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.

The screenshot shows the homepage of the Blue California Employer Enrollment Tool. At the top, there is a navigation bar with the Blue California logo, a search bar, and a user profile dropdown labeled 'House Broker'. The main navigation menu includes 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. A blue banner below the navigation bar reads: '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 hero section with a photo of four people and the text 'Welcome House Broker!'. Underneath the hero section are five blue buttons: 'New Enrollment', 'View Small Group Enrollments', 'Quote a Small Group', 'View Small Group Quotes', and 'Manage All Groups'. The bottom section is divided into two columns. The left column, titled 'Enrollment Progress', features a donut chart and three status categories: 'Not yet started' (9/1/2023 Effective: 1, 10/1/2023 Effective: 2, 1/1/2024 Effective: 11), 'In Progress, not submitted' (9/1/2023 Effective: 7, 10/1/2023 Effective: 5, 1/1/2024 Effective: 10), and 'Submitted, requires broker action' (9/1/2023 Effective: 1). A legend at the bottom of this section shows 'Submitted Pending UW' (orange), 'Approved BSC Finalizing' (green), and 'Enrolled' (yellow). The right column, titled 'To Do', lists four items: 'SGRPJULTESTGRP92: Maintenance Documents Required' (three times) and 'SGJULLOCALACCESSPLS02: Maintenance Documents Required'.

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.

HOMEMY GROUPSMY REPORTSRESOURCES

Terminate EmployeesCancel GroupEnroll EmployeeEdit Group

AccountTRAVEL AGENCY

Group IDW0126155

StatusActive

Business UnitISGBU

Cancel Date12/31/2999

Account Payment StatusCurrent

EMPLOYER INFORMATIONMEMBER ROSTERENROLLMENT CONTRACTSEMPLOYER CONTACTSPAYMENTMORE

> Account Information

> Address Information

> Principal Address

> Billing Address

> Waiting Period

> Group Contribution

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 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.

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 ⓘ

employee name

Next

Previous

Cancel

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 ⓘ

First Name
employee

Last Name
name

Medical

Accept

Decline

Please select at least one plan to continue.

Save

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.


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

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.

Terminate Employees

Cancel coverage for multiple employees at once. Any dependents associated with the employees will also be canceled from coverage.

Click "Enter Terminations" to enter cancelation information directly on the screen or click "Upload File" to upload CSV file with member termination information. For direct tool entry, check the box next to the employee's name from the group roster below then provide the cancelation information.

Enter Terminations

Upload File

Bulk member cancellation continued

Direct tool entry

How – Select the members and enter their cancellation details in the table. Use the check box next to the member’s name to select them for cancellation. For larger rosters, use the name or ID search to quickly find and select members. Next, provide the cancellation 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.

Enter Terminations

Upload File

Termination Date

Benefit end date

Cancel Reason

CalCOBRA Eligible

Select an Option

Select an Option

Apply to all Selected Employees

Member Name

Member ID

☐

Member Name

Member ID

Termination Date

Benefit End Date

Cancel Reason

CalCOBRA Eligible

CalCOBRA Eligible ...

☐

MINDY K KALING

912912912

Select an Op...

Select an O...

Select an Op...

☐

PARKER POSEY

915915915

Select an Op...

Select an O...

Select an Op...

< Previous

1

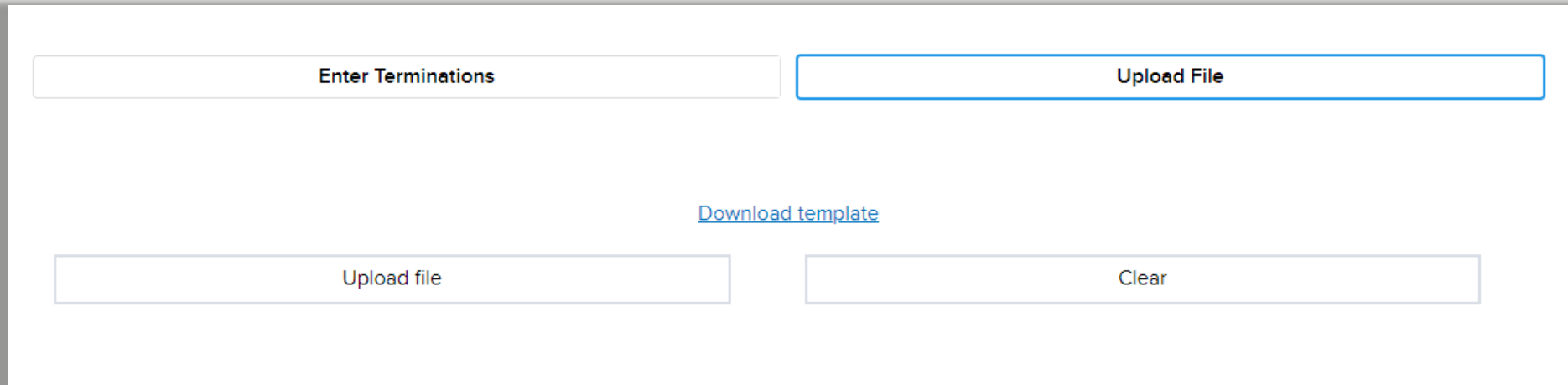
Next >

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.



The screenshot displays a web interface for bulk member cancelation. At the top, there are two buttons: "Enter Terminations" and "Upload File". The "Upload File" button is highlighted with a blue border. Below these buttons, there is a link labeled "Download template". At the bottom, there are two more buttons: "Upload file" and "Clear".

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.

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 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.

▼ Update Primary Contact

Existing Primary Contact

Name* ?
Lisa Courtemanche

Phone*
(555) 123-4555

Email*
lcourtemanche@dtwc.com.invalid

Cancel Date ?

◀ February ▶ 2024 ▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	1	2
3	4	5	6	7	8	9

Today

▼ Update Secondary Contacts

Existing Secondary Contacts

Contact Name* ?
Stephanie Kenyon

Phone Number*
(619) 525-2663

Email*
no_one@email.com.invalid

Add Contact

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 modifications

Specify the type of group plan change

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.

I'm making open enrollment plan changes. Apply this change to only the renewal plans. *

☒ Yes ☐ No


☒ Add a new product or new plans to your existing products.


Select the effective date for adding new product and/or new plans.


Select the effective date for adding new product and/or new plans. *
03/01/2024


☐ Cancel a product or cancel plans within your existing product

Select Coverage Options


Medical


Dental


Vision


Life

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.

Select Medical Coverage

Make the group plan selections

To add a plan, select the plan package or option to 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 blue Cancel link in the current plan table. Select and use the arrows to move the plan name into the canceled plan label.

Current Plans

Gold Full PPO 500/30 OffEx
Bronze Full PPO 7500/65 OffEx

Select Plan Package

Off-ExchangeMirror

Network

☐ Trio ACO HMO
☐ Tandem PPO

☐ Access+ HMO
☐ Full PPO

☐ Local Access+ HMO

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 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 blue Cancel link in the current plan table. Select and use the arrows to move the plan name into the canceled plan label.

Current Plans

Platinum Access+ HMO (R) 0/25 OffEx

Platinum Access+ HMO (R) 0/30 OffEx

Silver Access+ HMO (R) 2300/70 OffEx

Silver Access+ HMO (R) 2750/70 OffEx

▶

◀

Canceled Plans

Platinum Access+ HMO (R) 0/20 OffEx

Bronze Access+ HMO (R) 7000/70 OffEx

Gold Access+ HMO (R) 0/35 OffEx

Gold Access+ HMO (R) 1000/35 OffEx

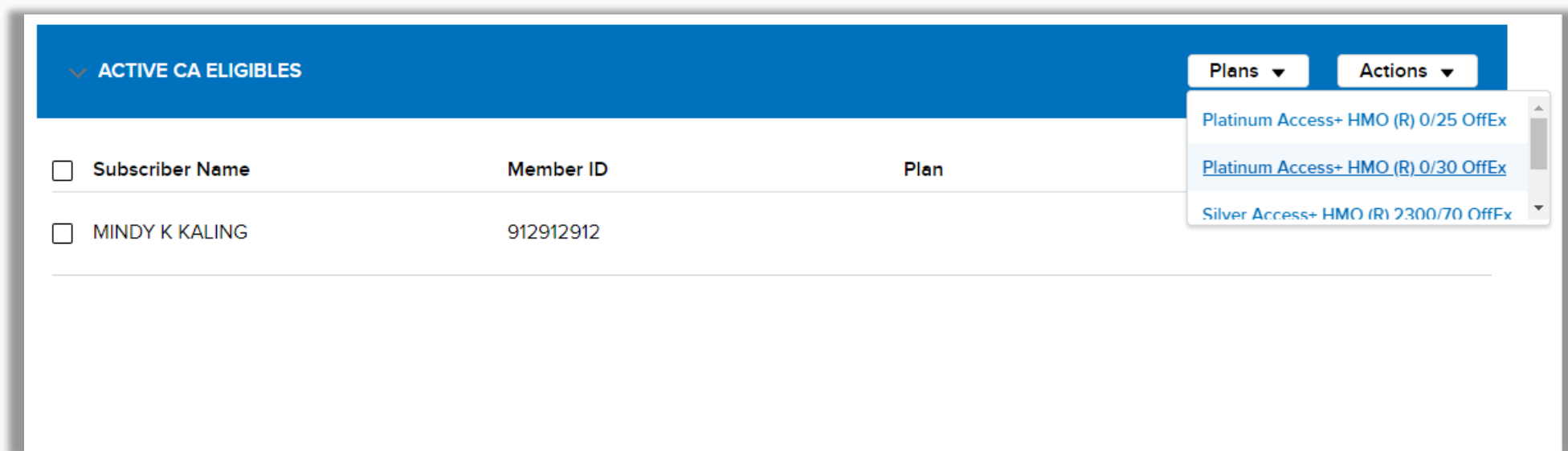
☒ Check this box to acknowledge that the above specified plans will be cancelled, and these plans will no longer be available for enrollment

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.

Move impacted subscribers to new plans

Expand the section(s) to move subscribers to the available plans. Select the members and use the action dropdown menu to assign the new plans.

ACTIVE CA ELIGIBLES

<input checked="" type="checkbox"/>	Subscriber Name	Member ID	Plan
<input checked="" type="checkbox"/>	MINDY K KALING	912912912	

Plans

Actions

Gold Access+ HMO (R) 500/35 OffEx

Platinum Access+ HMO (R) 0/25 OffEx

Platinum Access+ HMO (R) 0/30 OffEx

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.

Move impacted subscribers to new plans

Expand the section(s) to move subscribers to the available plans. Select the members and use the action dropdown menu to assign the new plans.

ACTIVE CA ELIGIBLES

Bronze DPPO/\$1500/MAC/Child Only Ortho

Actions

Assign Plans

Reset

Clear All

<input checked="" type="checkbox"/>	Subscriber Name	Member ID	Plan
<input checked="" type="checkbox"/>	MINDY K KALING	912912912	
<input checked="" type="checkbox"/>	PARKER POSEY	915915915	

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.


Group details

Make changes to the group demographic information


Click on the demographic type to open the fields, enter the new group information, and then save.

Required fields must be completed before moving forward.

Update Principal Business Address

 525 GARDEN STREET SANTA BARBARA CA

Update Billing Address(es)

 CLEAR CONSTRUCTION 525 GARDEN STREET SANTA BARBARA

Next

Previous

Cancel

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

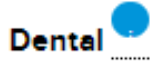
Employer contributions

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.

Employer Contributions

Please define the employer contribution

Dental

Subscriber Contribution

☐ \$ ☒ %

Enter a number*
50

Dependent Contribution

☐ \$ ☒ %

Enter a number*
0

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

Next

Previous

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.

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.

Update Business Name

▼ Simple Name Change

Select the group's name change filing. You can select either one or both *

☐ Filed fictitious business name (FBN) for new fictitious business Doing Business As (DBA)

☐ Filed amendment/conversion for corporations/partnerships

Next

Previous

Cancel

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

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

Enter the new eligibility information in the respective section.
Required fields must be completed before moving forward.

▼

Waiting Period

Change the waiting period for the corresponding Classes offered. Select the date for the changes to take effect then use the drop down menu to select the waiting period rule.

Effective Date

ACTIVE CA ELIGIBLES

Effective on the 91st day following d... ▼

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

Enter the new eligibility information in the respective section.
Required fields must be completed before moving forward.

> [Waiting Period](#)

▼ [COBRA and Cal-COBRA Coverage](#)

Change the continuation of care coverage program. Select the coverage program and enter the most current employee counts.

Effective Date
01-01-2024

☐ Federal COBRA ☒ Cal-COBRA

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.

Eligibility Options

Enter the new eligibility information in the respective section.
Required fields must be completed before moving forward.

> [Waiting Period](#)

> [COBRA and Cal-COBRA Coverage](#)

▼ [Part Time Employee Coverage](#)

Change the part time coverage offering. Select Yes to offer part-time coverage or No to not offer part-time coverage.

Effective Date
03-01-2024

☒ Yes ☐ No

Total number of eligible part time employee...
1



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.

blue of california

sgaprtstgr

Test House Broker

HOME

MY GROUPS

MY REPORTS

RESOURCES

Cancel Group

Enroll Employee

Edit Group

Account

SGAPRTESTGRP68

+ Follow

Group ID

W2125231

Status

Approved

Business Unit

ISGBU

No of Employees

5

Cancel Date

12/31/2999

Account Payment Status

EMPLOYER INFORMATION

MEMBER ROSTER

ENROLLMENT CONTRACTS

QUOTES COMPLETED

QUOTES IN PROGRESS

EMPLOYER CONTACTS

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 as CSV

Search

Status

Effective Date

	Member Name	Member Id	Birth Date	Status	Effective Date	Benefit Begin Date	Benefit End Date
1	VAHRADIAN STEPHANIE1	912149303	01/01/1978	Active	04/01/2023	04/01/2023	
2	HERAS SOTO TODD	912149299	01/01/1978	Active	04/01/2023	04/01/2023	
3	JARIEL JEFFREY	912149300	01/01/1978	Active	04/01/2023	04/01/2023	
4	OSSER BEVERLY	912149301	01/01/1978	Canceled	04/01/2023	04/01/2023	04/30/2023
5	MICHAELA JONES	912149302	01/02/1978	Canceled	04/01/2023	04/01/2023	04/30/2023
6	MARIAN SABOO	912149539	04/08/1988	Pending	04/12/2023	06/01/2023	

Privacy Policy

Report Fraud & Abuse

Legal Disclaimers

Contact

Nondiscrimination notice

Language assistance

Cobrowse

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.

Go back to group

ID Card

Cancel member

Edit Subscriber

Member

MIGUEL TORRES

Subscriber Id

909338975

Group

CLEAR CONSTRUCTION

Status

Active

DETAILS

PLANS

DEPENDENTS

TRANSACTION HISTORY

PRIMARY CARE PROVIDER

Subscriber Information

First Name

MIGUEL

Last Name

TORRES

Middle Initial

Date Of Birth

09-07-1989

Age

34

Gender

Male

SSN

615431172

Date Of Hire

07-29-2019

Original Effective Date

2019-10-01

Address Information

Home Street Address

304 W ROBERT AVE

Address Line 2

City

OXNARD

State

CA

Zip

93030

Mailing Street Address

304 W ROBERT AVE

Address Line 2

City

OXNARD

State

CA

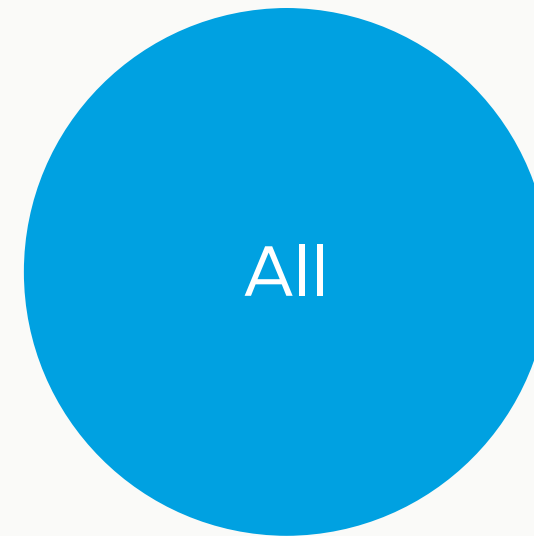
Zip

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.




- 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.



Cancel member

Canceling members will remove them from Blue Shield of California healthcare coverage

▼ Subscriber

Member Name*

MIGUEL TORRES

Subscriber ID*

909338975

Cancellation Reason*

▼

Cancellation Date*

Benefit End Date

Cal-COBRA Eligible

☐ Yes

☐ No

Next

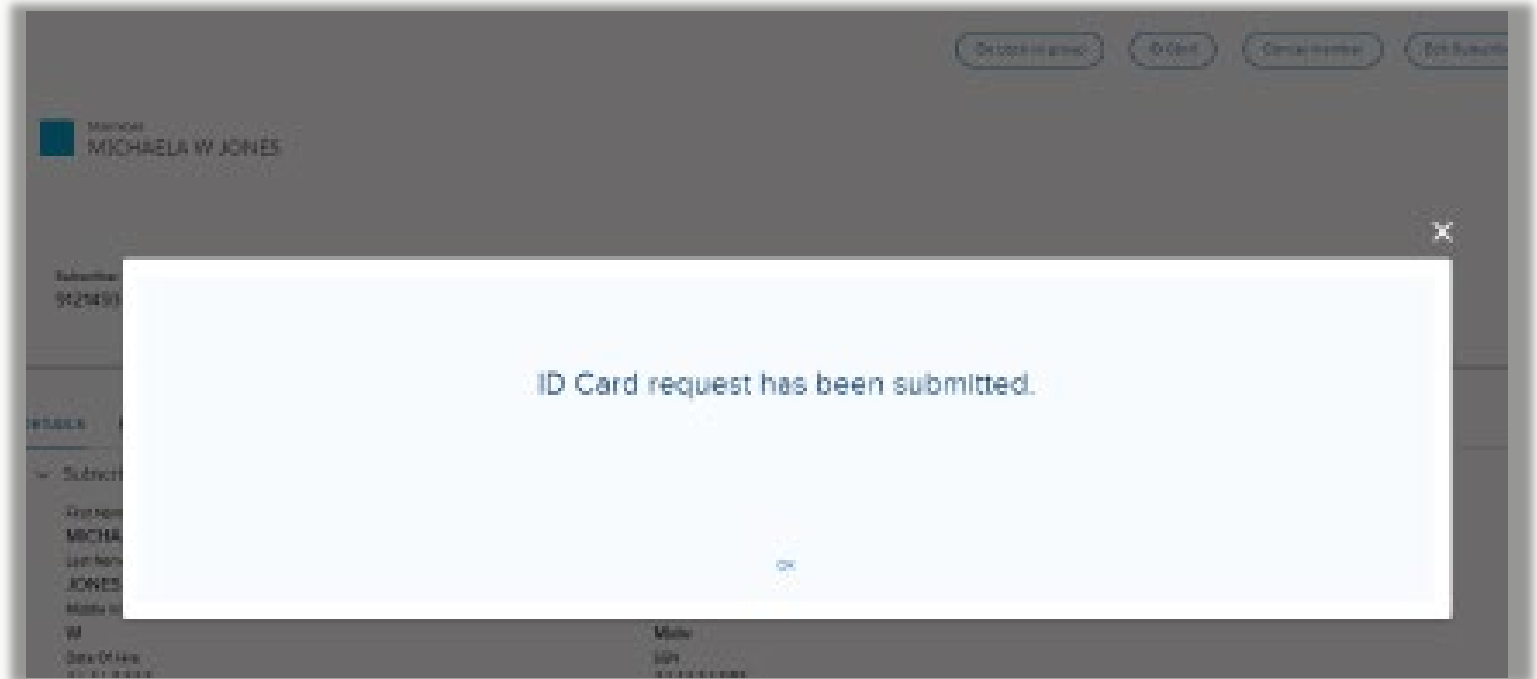
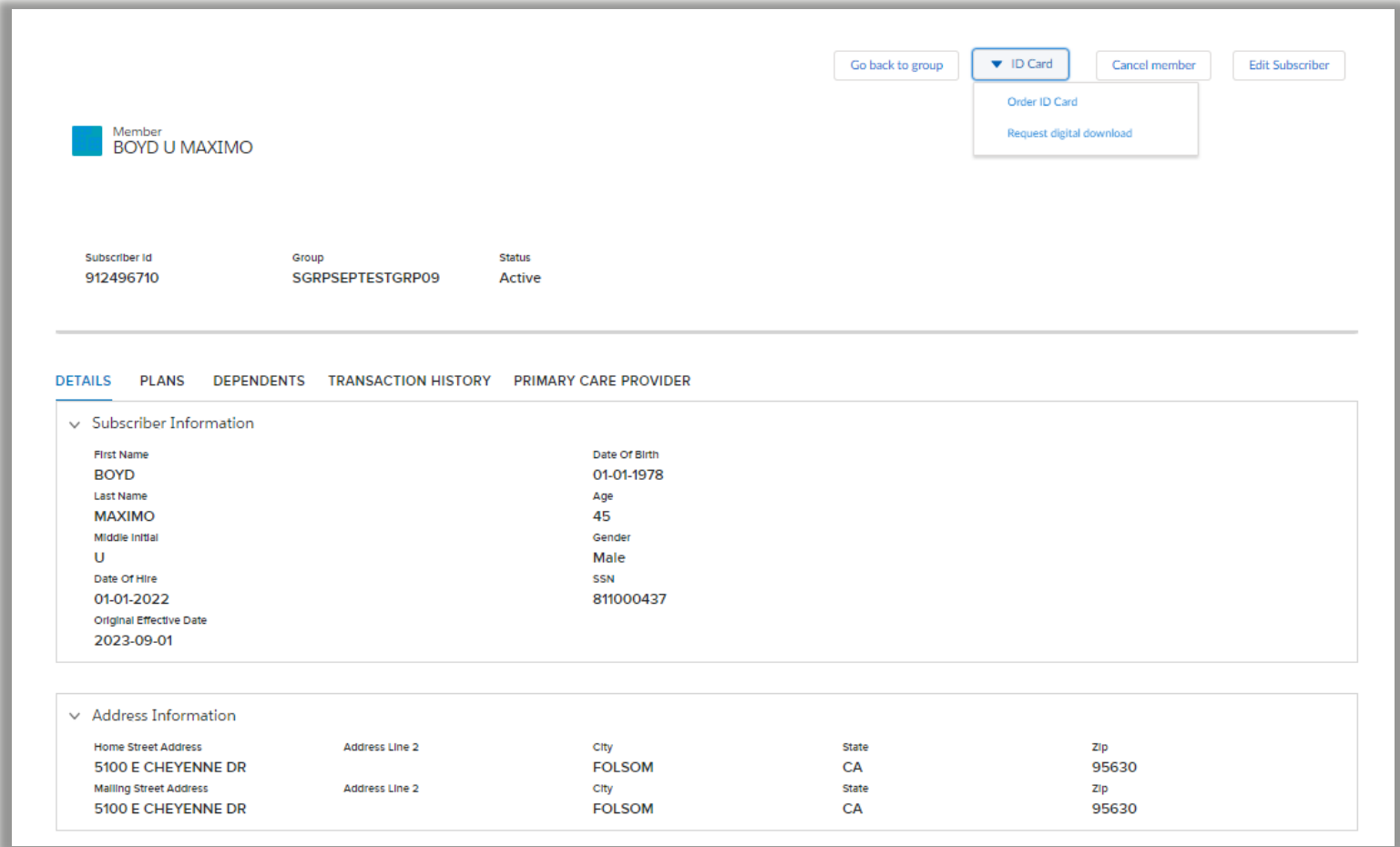
Cancel

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.

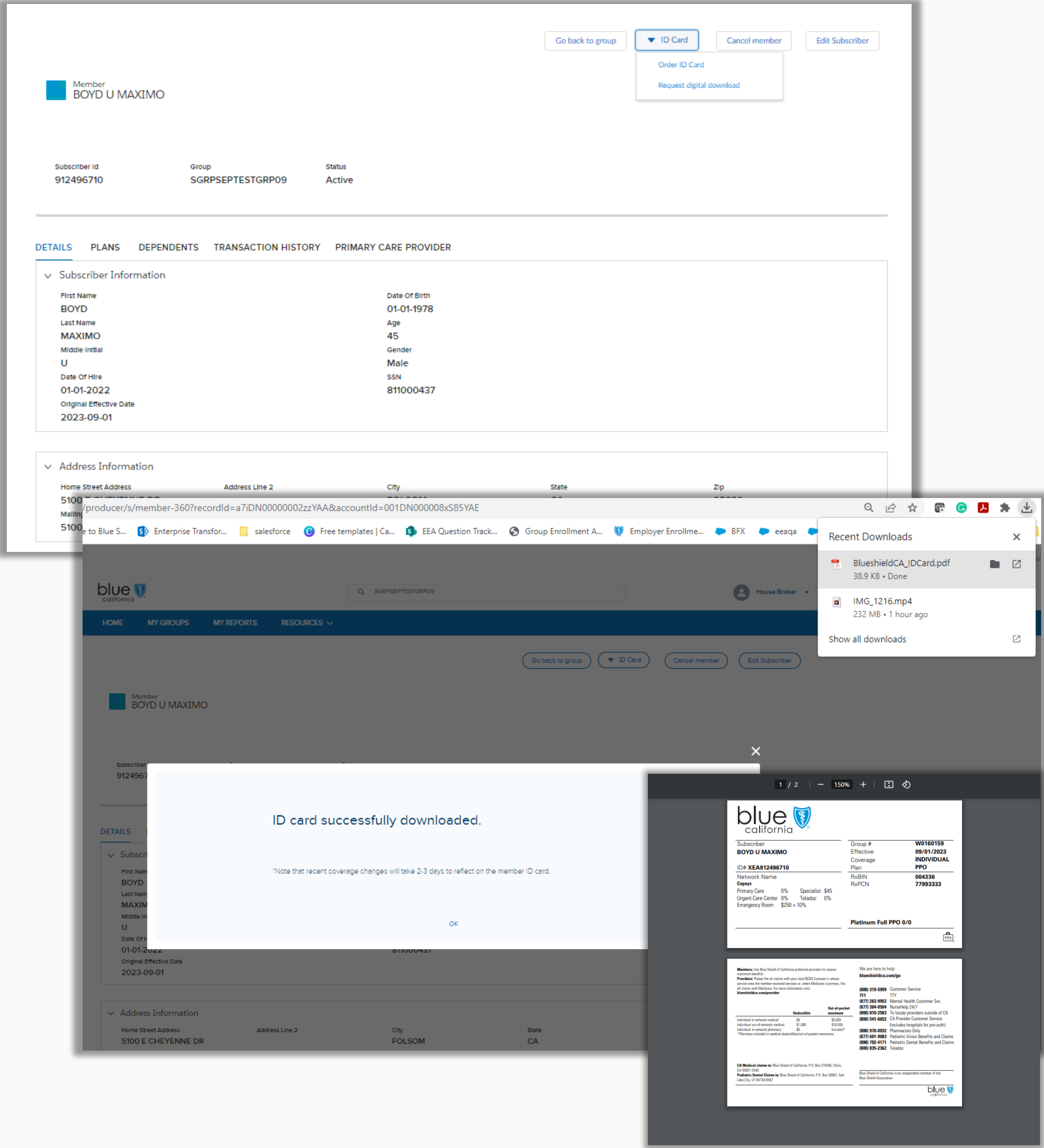


Download ID cards

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.

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 ⓘ

employee name

Next

Previous

Cancel

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 ⓘ

First Name
employee

Last Name
name

×

Medical

☐ Accept

☐ Decline

×

Please select at least one plan to continue.

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 InitialLast Name*

Date of Birth*Primary Care ProviderPrimary Care DentistFind a Doctor

Gender*Gender Identity

SSN

Communication PreferenceEmail

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

SSN
615431172

Gender*
Male

Date of Hire
07-29-2019

Subscriber Status*
☒ Full Time ☐ Part Time

Earnings (excluding overtime, bonuses, etc.)

Salary Effective Date

Effective Date
10-01-2019

Middle Initial
▼

Date of Birth*
09/07/1989

Gender Identity
▼

Earnings Frequency
▼

Last Name*
TORRES

Marital Status*
Single
▼

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 and EIN, or HQ 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

 Upload Files 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 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