



Employer Enrollment Tool

Small Group Renewal

Last updated October 2024



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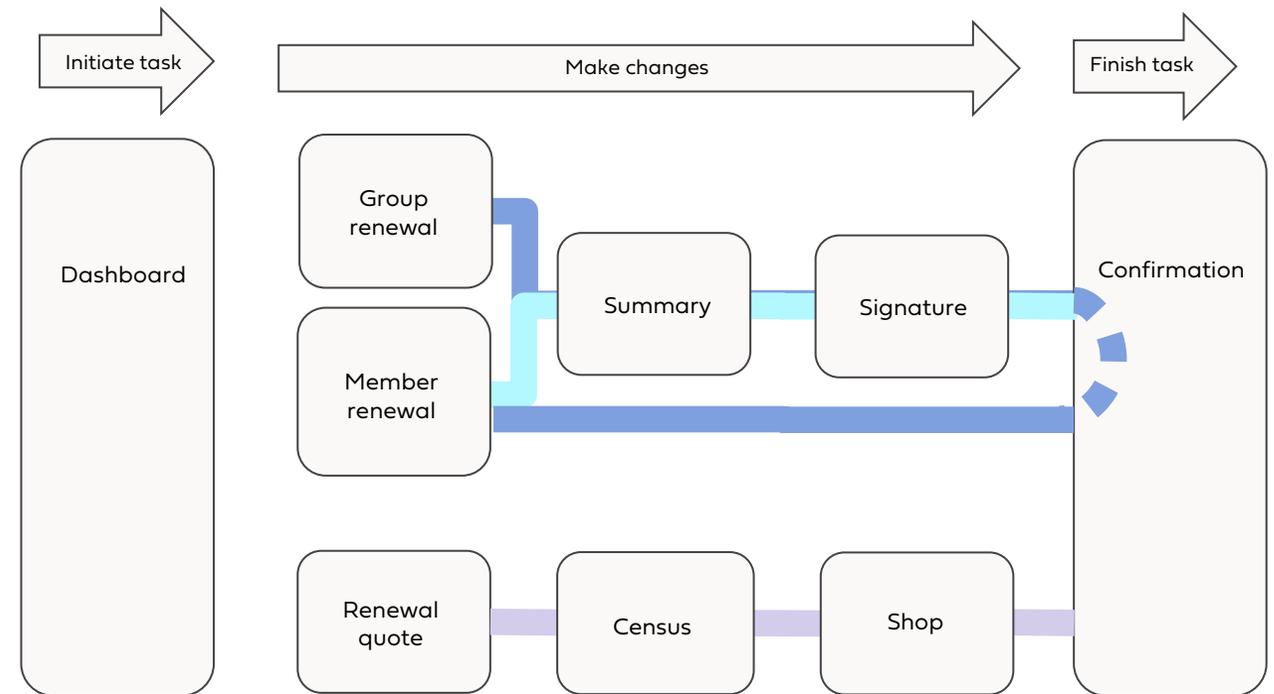
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Visit the Employer Enrollment Tool resource page on blueshieldca.com/broker to access additional tool resources, training videos, and enrollment guidelines.

Employer Enrollment Tool Renewals consists of three main task areas for brokers to manage their client renewals.

1. Creating quotes for existing customers
2. Submitting changes to group-level/contract level coverage offerings
3. Submitting changes to member coverage and plan elections



Renewal capabilities in Employer Enrollment Tool

Both Employer Enrollment Tool Renewal and Maintenance provide a robust suite of features to process renewal changes for your clients.

Feature	SGOR	Employer Enrollment tool
Renewal Book of Business	✓	✓
Real time group data and subscriber roster		✓
Guided Flow		✓
Transaction Summary		✓
Transaction Confirmation #	✓	✓
Transaction Log		✓
Submission Reports	✓	✓
Email Renewal changes	✓	✓
Resume Renewal Check out*	✓	

Feature	SGOR	EET - Renewals	EET - Maintenance
Generate group quotes	✓	✓	Not applicable
Add a class		✓	✓
Add plans	✓	✓	✓
Cancel plans	✓	✓	✓
Update Rider Options		✓	✓
Update Waiting Period at class plan level		✓	✓
Update Employer Contribution		✓	✓
Update Part-time coverage			✓

Feature	SGOR	EET - Renewals	EET - Maintenance
Enroll new employees			✓
Enroll COBRA members			✓
Update existing member plans	✓	✓	✓
Add new dependents			✓
Reinstate members			✓
Cancel members		✓	✓
Update existing members details			✓
Update Member PCP			

Preparing for launch and tool cutover

Starting July 11, 2024, brokers will process their Small Group client group and member renewal changes via Employer Enrollment Tool Renewal.

The image shows two screenshots from the blue shield online portal. The top screenshot is the main dashboard, which includes a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below the navigation bar, there is a welcome message for 'Default 383969064 User!' and a row of six buttons: 'New Enrollment', 'View Small Group Enrollment', 'Quote a Small Group', 'View Small Group Quotes', 'Manage All Groups', and 'Renew a Small Group'. The bottom screenshot is the 'SMALL BUSINESS RENEWAL DASHBOARD', which features a table of renewal data for May 2024. A large black arrow points from the 'Renew a Small Group' button in the top screenshot to the 'SMALL BUSINESS RENEWAL DASHBOARD' screenshot.

Business Name * A-Z	Members	Current Premium	New Premium	Renewal Date
	7	\$2,575.45	\$2,940.06	5/1
	4	\$3,087.45	\$3,425.88	5/1
	4	\$3,438.24	\$3,740.02	5/1
	5	\$5,269.61	\$5,987.56	5/1
	4	\$3,747.53	\$4,256.67	5/1
	3	\$1,250.44	\$1,493.91	5/1

Maintenance vs. Renewal

- When a group is in a renewal period you can submit changes as Maintenance or Renewal
- Maintenance changes use the features already available in EET with the "Open Enrollment" qualifying event
- Renewal changes use the newly launched features to create a single submission of multiple group and member changes in one transaction

Access

- Only brokers will have access to the EET Renewal features
- Your clients can submit changes during their renewal period as Maintenance using the "Open Enrollment" qualifying event

Renewal packets and information

- No changes to how we send you and your clients renewal information
- Click on Access Shield Renewals button to view or download renewal packets

Preparing for launch and tool cutover

Transitioning from the Small Group Online Renewal tool (SGOR) to Employer Enrollment Tool Renewal (EET) starting with 10/1 renewals.

Tool transition timeline by renewal month						
Group renewal month	6/1 renewal	7/1 renewal	8/1 renewal	9/1 renewal	10/1 renewal	11/1 renewal
Submit changes via - Small Group Renewal tool	X	X	X	X		
Submit changes via - Employer Enrollment Tool Renewal					X	X

July

- July, August, September renewals in SGOR
- October renewals in EET

August

- August, September renewals in SGOR
- October, November renewals in EET

September

- September renewals in SGOR
- October, November, December renewals in EET

October

- October, November, December, January renewals in EET

November+

- November, December, January renewals in EET

Enrollment eligibility rules for renewal

Who can renew?

A group with an existing Blue Shield group health service contract is eligible for guaranteed renewal if :

- It is a group of one or more common-law employees;
- It has made all required premium payments;
- Neither it nor its employees or dependents have committed fraud or misrepresentation;
- It maintains the required 51% of its employees (full-time and full-time equivalent) in California;
- It continues to meet participation and contribution requirements; and
- It has otherwise maintained small group eligibility

Read the [Underwriting Guidelines](#) for all enrollment eligibility rules

Key renewal eligibility dates to know



Renewals are available 120 days before the anniversary date



Renewal changes are accepted until the last day of the renewal month

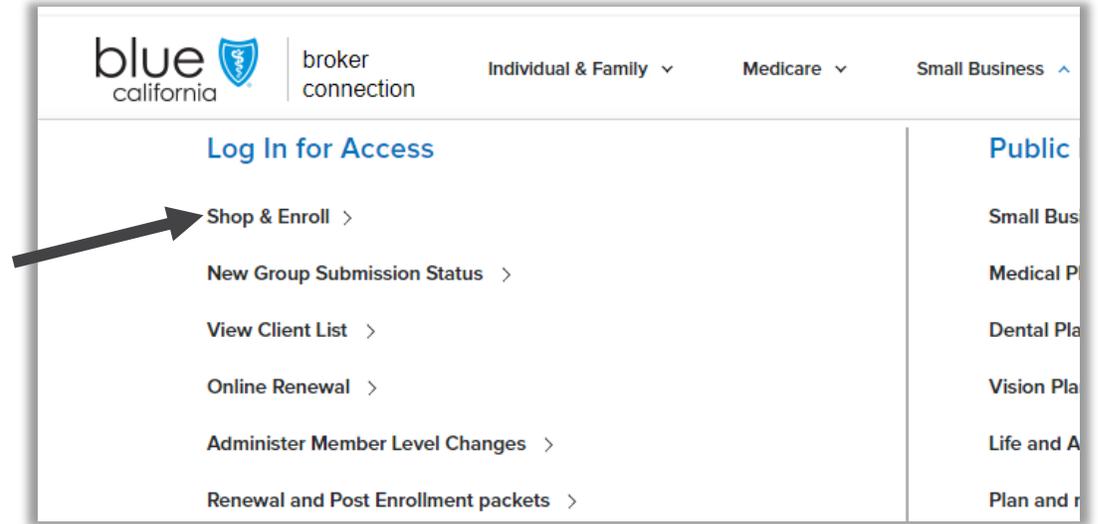
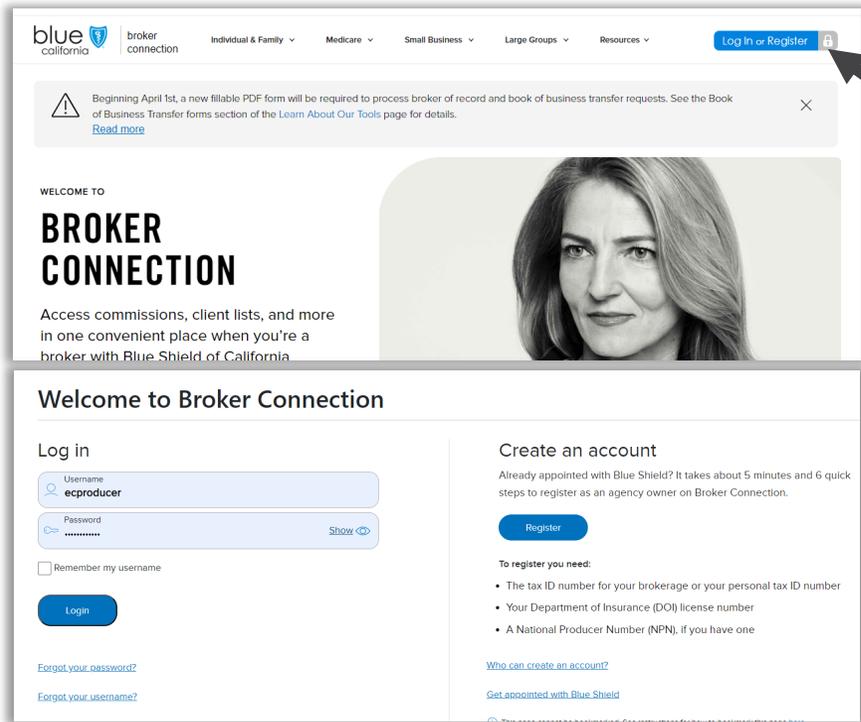


If no action is taken or changes submitted, Blue Shield will assume consent and the group will be automatically renewed into the plans suggested in their renewal notice



Active members whose plan is canceled have 60 days to enroll in a new plan or coverage will be terminated

Navigate to Employer Enrollment Tool



Step 1. Log into Broker Connection

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

Step 2. Click on the Shop & Enroll option

- The link will route you to the Employer Enrollment Tool

Navigate to renewals

Similar to new group enrollments, renewals are only accessible through the quick action button on the tool homepage.

Click on Renewal a Small Group to access the renewal dashboard and make renewal changes

The screenshot shows the user interface for the EET Renewals tool. At the top left is the 'blue california' logo. A search bar is located at the top right, next to a user profile icon labeled 'Default 383969064 User'. Below the header is a navigation menu with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. A teal banner contains the following text: 'October renewals are available for processing. Use SGOR for July - September renewal processing. Accessing Shield Renewal will require additional login at that site. Check out your renewal resources and training recordings on the Employer Enrollment Tool resource page.' Below the banner is a large image of four business professionals sitting together, with the text 'Welcome Default 383969064 User!' overlaid on the right. Underneath the image is a row of six buttons: 'New Enrollment', 'View Small Group Enrollments', 'Quote a Small Group', 'View Small Group Quotes', 'Manage All Groups', and 'Renew a Small Group'. At the bottom, there are two main sections: 'Enrollment Progress' and 'To Do'. The 'Enrollment Progress' section has three sub-sections: 'Not yet started', 'In Progress, not submitted', and 'Submitted, requires broker action'. The 'To Do' section has a 'View More' link.

Navigate the dashboard

The renewal dashboard is your hub for all things renewal for your agency book of business.

- You will see all groups across the dashboard tabs, but only active renewal months will have the ability to make changes
- Groups are listed in alphabetical order under each renewal month tab
- 10 groups are listed in the table. Months with more than 10 groups have pages available to click through the full list
- Access Shield Renewals button will route you to the renewal notices and information sent to your clients in a new browser tab.

Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼		Company A	W000001	07/01/2024	1	4	\$2414.97	\$2784.14	15.29	Not Started	Not Started	
	Start Renewal		Company B	W000001	07/01/2024	1	1	\$1663.03	\$1882.54	13.20	Not Started	Not Started	
	Start Open Enrollment		Company C	W000001	07/01/2024	5	5	\$431.5	\$431.5	0.00	Not Started	Not Started	
	Run a Quote		Company D	W000001	07/01/2024	1	2	\$108.9	\$108.9	0.00	Not Started	Not Started	
5	▼		Company E	W000001	07/01/2024	11	29	\$23005.74	\$31912.33	38.71	Not Started	Not Started	

Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
	Start Renewal		Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
	Start Open Enrollment		Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
	Run a Quote		Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▼	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼		Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Navigate the dashboard

- Search is enabled on the dashboard to quickly find a group by the name or group number
- Filter the dashboard table to see which renewal submissions are not started, are submitting and processing with Blue Shield, or complete
- Sort the dashboard table by account name, renew as is marker, renewal status, and open enrollment status

The screenshot shows the dashboard interface with a table of renewal submissions. A dropdown menu is open for the 'Renewal Status' column, showing options: --None--, Not Started, In Progress, and Completed. The table has columns for 'Make a Change', 'Renew As Is', 'Account Name', 'Group ID', 'Renewal Date', 'No of Employees', 'No of Active Members', 'Current Premium', 'Renewal Premium', '% Change', 'Renewal Status', 'Open Enrollment Status', and 'Renewal Iterations'.

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	5	5	\$272	\$272	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▼	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	▼	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▼	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

The screenshot shows the dashboard interface with a search filter applied to the 'Group ID' column. The search box contains 'w001'. The table displays the same data as the previous screenshot, but with the search filter applied.

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▼	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	▼	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▼	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Leverage the dashboard

Leverage the renewal dashboard as your own book of business tracker with the renew as is, renewal status, and open enrollment status columns.

Managing passive renewal clients

- A simple check mark next to the group name lets you know which groups are renewing as is – without changes – this renewal period.

How

- Click into the renew as is column, check the box to renew as is, click the Save button.

Navigation: HOME MY GROUPS MY REPORTS RESOURCES

Month Selector: Jul 2024 Aug 2024 Sep 2024 Oct 2024 Nov 2024 **Dec 2024** Jan 2025 Feb 2025 Mar 2025 Apr 2025 May 2025 Jun 2025

Instructions: Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.

Search: [] Renewal Status: --None-- Open Enrollment Status: --None-- [Access Shield Renewal](#)

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▼	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	▼	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▼	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Navigation: HOME MY GROUPS MY REPORTS RESOURCES

Month Selector: Jul 2024 Aug 2024 Sep 2024 Oct 2024 Nov 2024 **Dec 2024** Jan 2025 Feb 2025 Mar 2025 Apr 2025 May 2025 Jun 2025

Instructions: Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.

Search: [] Renewal Status: --None-- Open Enrollment Status: --None-- [Access Shield Renewal](#)

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▼	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	▼	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▼	<input type="checkbox"/> Renew As Is	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Leverage the dashboard

Managing active renewal clients

- The dashboard status columns display the submission status of your changes made in EET.

How:

- The status will automatically update in real time as your submissions are installed.

The screenshot shows a dashboard interface for managing renewals. At the top, there is a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below this is a timeline from July 2024 to June 2025, with 'Dec 2024' selected. A message reads: 'Click the Action dropdown menu to begin the renewal process: Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.' There is a search bar and two dropdown menus for 'Renewal Status' and 'Open Enrollment Status', both currently set to '--None--'. An 'Access Shield Renewal' button is visible. The main part of the dashboard is a table with the following columns: 'Make a Change', 'Renew As Is', 'Account Name', 'W000001', '12/01/2024', 'No of employees', 'No of Active Members', 'Current Premium', 'Renewal Premium', '% Change', 'Renewal Status', 'Open Enrollment Status', and 'Renewal Iterations'. A dropdown menu is open over the 'Renewal Status' column, showing options: '--None--', 'Not Started', 'In Progress', and 'Completed'. The table contains 8 rows of data for different companies (A through H).

Make a Change	Renew As Is	Account Name	W000001	12/01/2024	No of employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	✓	Company A				1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	✓	Company B				2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Running a renewal quote

Navigate to renewal quotes

On the renewal dashboard, select Run a Quote from the Action menu

Quote tips

- Quotes are not required to make plan or product changes
- The census upload is compatible with the major quote engine census templates
- Medical and Specialty products will download as separate CSV files
- Completed quotes can not be edited. Create a new quote if information is changing

HOME MY GROUPS MY REPORTS RESOURCES ▾

Jul 2024 Aug 2024 Sep 2024 Oct 2024 Nov 2024 **Dec 2024** Jan 2025 Feb 2025 Mar 2025 Apr 2025 May 2025 Jun 2025

Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.

Search Renewal Status: --None-- Open Enrollment Status: --None-- [Access Shield Renewal](#)

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▾	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▾	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▾	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
			Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
			Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
			Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▾		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▾		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Employee medical rates and plan benefits

Employee contribution: \$184.68
Employee contribution to dependents: \$0.00
Total employee contribution: \$184.68

Total employer contribution: \$342.99
Total employee contribution: \$184.68
Total premium: \$527.67

Single plan view

Plan benefits	In-network	Blue Shield Bronze 40 PPO \$300/40 + Child Dental
Medical deductible	In-network	\$6,300
Out-of-pocket maximum	In-network	\$9,100
Pharmacy deductible	In-network	\$500
Copayment	In-network	\$40
Emergency room	In-network	40%
Inpatient hospitalization	In-network	40%
Urgent care	In-network	\$40
Rx Tier 1	In-network	\$17
Rx Tier 2	In-network	40%
Rx Tier 3	In-network	40%
Rx Tier 4	In-network	40%

Name	Age	Status	EE premium	DEP premium	Total
Peter Potter	32	EE	\$527.67	\$0.00	\$527.67

Renewal quote – group information

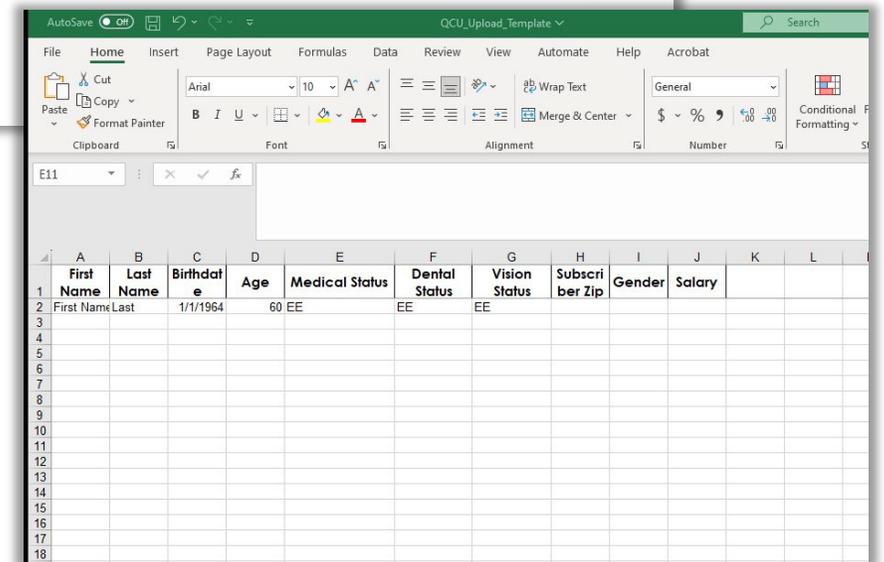
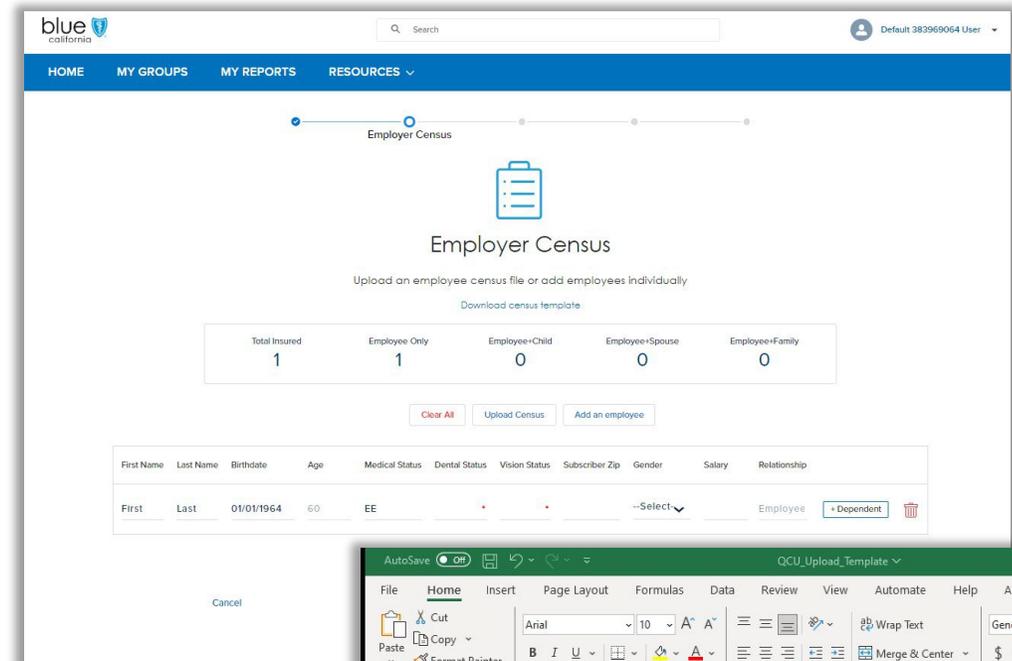
- Quotes started from the renewal dashboard will pre-populate some of the group's required quoting information including:
 - Plan effective date
 - Group name
 - Tax ID
 - Zip code
 - SIC code
- We'll always ask you to enter in the number of eligible employees you want on this quote
- Update Zip code, SIC code if they have changed since last year

The screenshot shows the 'Employer Information' form in the Blue Shield of California portal. The form is titled 'Employer Information' and includes a progress indicator at the top. The form fields are as follows:

- Effective Date:** May 1 2024
- Name of Business:** COMPANY O
- Number of Eligible Employees *:** (Empty field)
- Zip Code *:** 94607
- Federal Tax Identification (TID) number (Optional):** 123456789
- SIC Code (Optional):** 8049 Offices and Clinics of Health Practitioners n.e.c

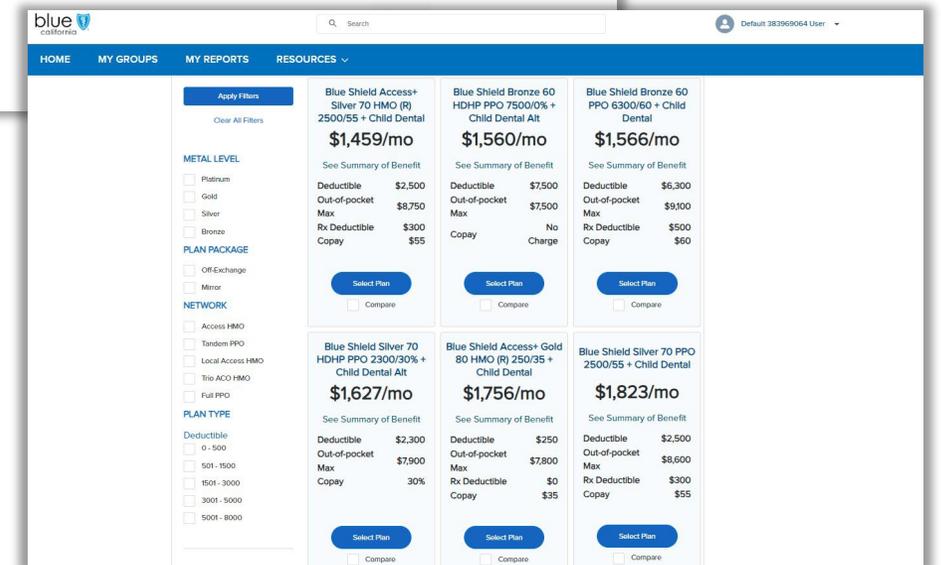
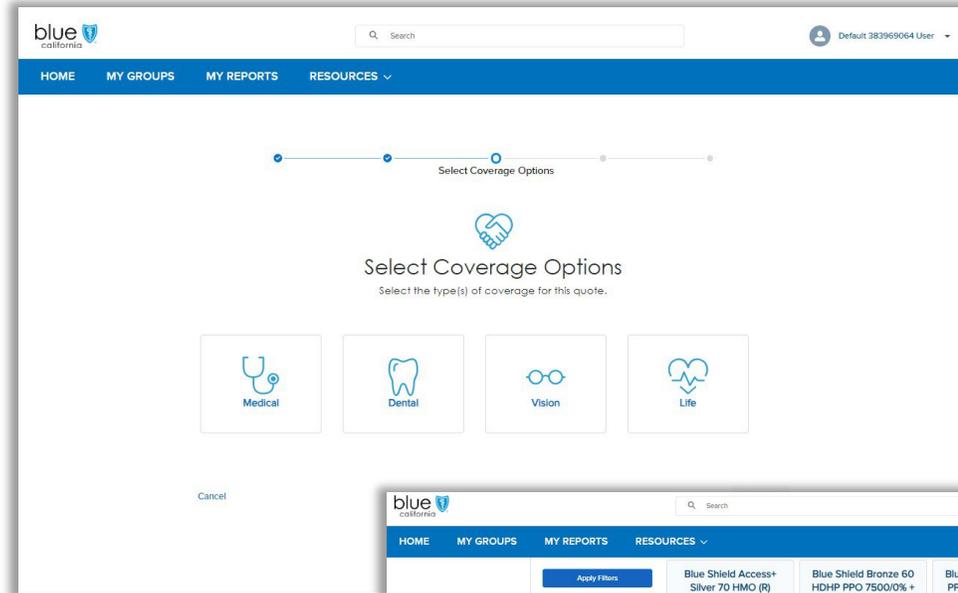
Renewal quote - census

- An employee census file can be uploaded or added individually to the Employer Census page
 - Users can download a census template from this page or use an CSV file of their own



Renewal quote - select products and shop plans

- Next, the users select the products to be quoted on the Select Coverage Options pages
 - All products and plans can be quoted except for graded life



Renewal quote - finalize your quote

- The Employer Contributions section will cover all products being quoted
 - This section is not required during the quoting phase
- The completed quote can be downloaded, emailed securely, or the user can proceed by clicking Continue to Enrollment
 - CSV downloads and emails are available immediately.
 - A message will appear on the screen to confirm your PDF download request. An email will be sent when the file is ready for download from the tool.

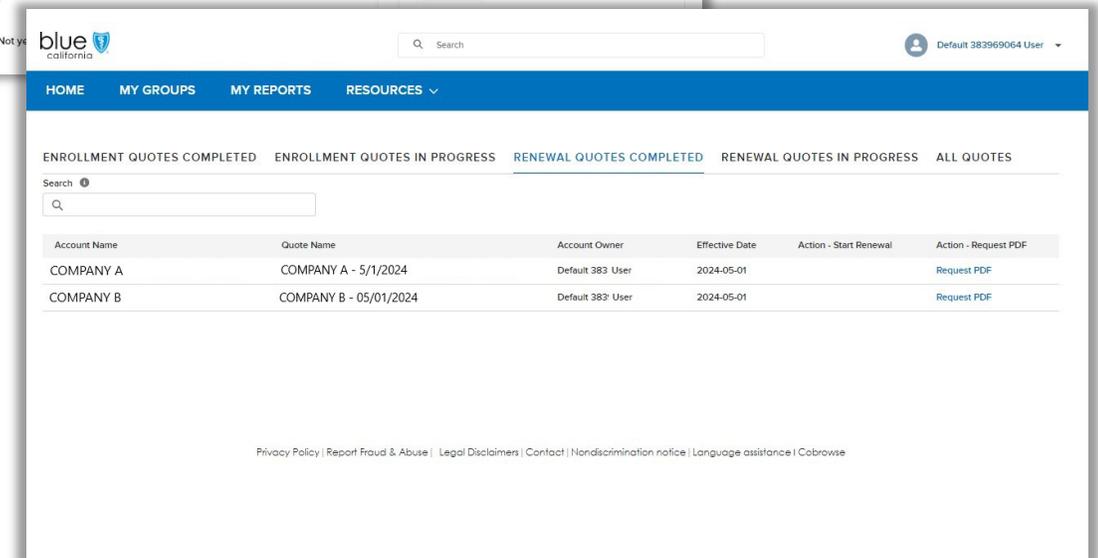
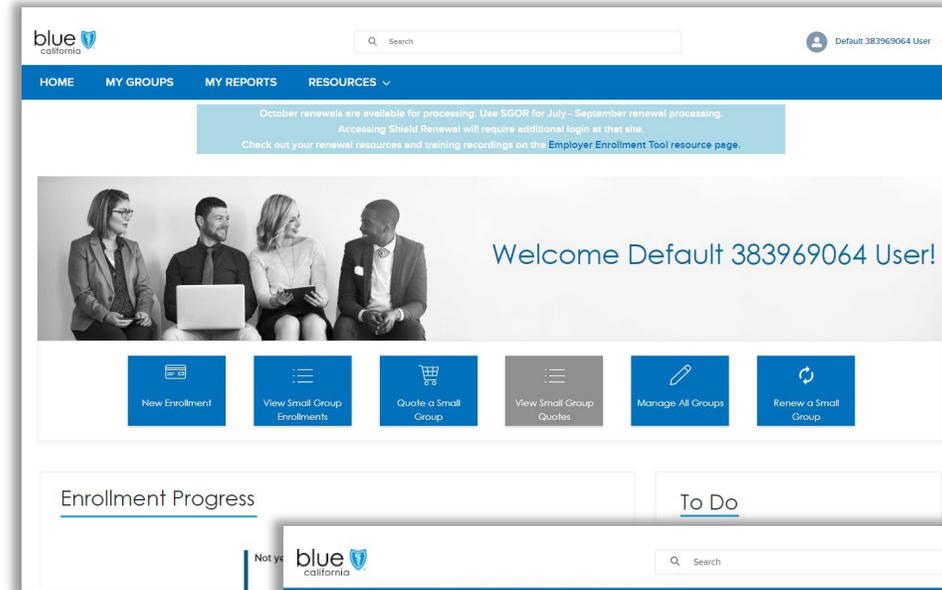
The screenshot shows the 'Employer Contributions' page. At the top, there is a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below the navigation bar is a progress indicator with five steps, and the current step is 'Employer Contributions'. The main heading is 'Employer Contributions' with a large dollar sign icon. Below the heading, it says 'Enter the employer contributions for the products and coverage being quoted'. There are four input fields: 'Medical Employee Contribution', 'Medical Dependent Contribution', 'Dental Employee Contribution', and 'Dental Dependent Contribution'. Each field has a '\$' and '%' icon and an 'Enter a number' prompt. A 'Cancel' button is visible at the bottom left.

The screenshot shows the 'Your Complete Quote' page. At the top, there is a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below the navigation bar is a progress indicator with five steps, and the current step is 'Your Completed Quote'. The main heading is 'Your Complete Quote' with a document icon. Below the heading, it says 'Here is your quote.' and 'You can download and email the quote or continue on to the group enrollment. You can update the information in the quote at any time and a record of your quote will be available for 60 days.' There are three options: 'Send quote CSV via secure email', 'Download CSV file', and 'Request PDF'. A 'Return to Group Renewals' button is at the bottom.

Renewal quote - view completed quotes

Follow these steps to view completed quotes and retrieve the PDF quote proposal:

1. From the Employer Enrollment Tool landing page, click on View Quotes
2. Click on the Renewal Quotes Completed tab
3. A list of quoted groups is displayed. Click on the hyperlinked name of the group under the Quote Name column
4. View the information provided for the quote
5. In the Files section, click on the PDF file link to open and download the quote proposal



Submit group-level renewal changes

Navigate to group-level changes

On the renewal dashboard, select Start Renewal from the Action menu

Submission tips

- Some specialty plan changes require you to cancel and add in the same transaction. Move the plan into the cancel plan box before adding the new plan
- You can submit just group-level changes or group and member changes from this workflow

The screenshot displays the renewal dashboard interface. At the top, there are navigation tabs: HOME, MY GROUPS, MY REPORTS, and RESOURCES. Below this is a monthly navigation bar from Jul 2024 to Jun 2025, with Dec 2024 selected. A message states: "Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting." Below the message are search and filter fields for Renewal Status and Open Enrollment Status, both set to "--None--". A button labeled "Access Shield Renewal" is visible. The main part of the dashboard is a table with columns: Make a Change, Renew As Is, Account Name, Group ID, Renewal Date, No of Employees, No of Active Members, Current Premium, Renewal Premium, % Change, Renewal Status, Open Enrollment Status, and Renewal Iterations. Row 3 is highlighted, and its "Make a Change" dropdown menu is open, showing options: Start Renewal, Start Open Enrollment, and Run a Quote.

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▼	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
	Start Renewal												
	Start Open Enrollment												
	Run a Quote												
7	▼		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

View real-time renewals

View your client's coverage and offerings before making renewal changes for both group and member level renewal changes.

This information is updated real time as changes occurring in EET or other channels are submitted and processed by Blue Shield.

You can also view the renewal information and decide to not make changes and exit out of the workflow by clicking on Cancel.

The screenshot shows the Blue Shield of California user interface for viewing renewal information. The page title is "Renewal Information" and the main heading is "It's time to renew". Below the heading, a message states: "Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping." A table displays the account details:

Account Name	Group ID	Renewal Date
COMPANY X	W0126547	05/01/2024

Below the table, a comparison is shown between the "Current Year" and the "Renewal Year".

Current Year		Renewal Year	
No of employees	9	No of employees	9
No of covered members	7	No of covered members	7
No of covered dependents	0	No of covered dependents	0
Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

Below the comparison, there are sections for "Dental Premium: \$0" and "Vision Premium: \$0". Each section lists two plan options: "Diamond DPPO/\$3000/U95/Adult+Child Ortho" and "Gold DPPO/\$2000/U90/Adult+Child Ortho". The "Dental Premium" section also shows a "% Change: n/a".

At the bottom of the page, there is a "Download Member Roster" button and a note: "If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next."

View real-time renewals

- Premium calculations are updated when plan or membership changes are processed
- Plans are listed in order so you can view the year-over-year changes
- Download a CSV file member roster for current enrollment and plan elections

The screenshot shows the 'Renewal Information' page in the Blue Shield of California portal. The page title is 'It's time to renew'. Below the title, a message states: 'Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.' A table provides account details: Account Name (COMPANY X), Group ID (W0126547), and Renewal Date (05/01/2024). A comparison table follows, showing metrics for the 'Current Year' and 'Renewal Year'. The 'Current Year' metrics are: No of employees (9), No of covered members (7), No of covered dependents (0), Infertility Rider (No), and Total premium (\$100). The 'Renewal Year' metrics are: No of employees (9), No of covered members (7), No of covered dependents (0), Infertility Rider (No), Total premium (\$105), and % Change (5%). Below this, there are sections for 'Dental Premium: \$0' and 'Vision Premium: \$0'. The dental section lists two plans: 'Diamond DPPO/\$3000/U95/Adult+Child Ortho' and 'Gold DPPO/\$2000/U90/Adult+Child Ortho'. The vision section lists two plans: 'Preferred Vision Plus for Small Business 10/25/' and 'Ultimate Vision Plus for Small Business 10/25/1'. A 'Download Member Roster' button is located at the bottom of the comparison area. A footer note states: 'If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.'

Account Name	Group ID	Renewal Date
COMPANY X	W0126547	05/01/2024

Current Year		Renewal Year	
No of employees	9	No of employees	9
No of covered members	7	No of covered members	7
No of covered dependents	0	No of covered dependents	0
Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

Dental Premium: \$0	Dental Premium: \$0	% Change: n/a
Diamond DPPO/\$3000/U95/Adult+Child Ortho	Diamond DPPO/\$3000/U95/Adult+Child Ortho	
Gold DPPO/\$2000/U90/Adult+Child Ortho	Gold DPPO/\$2000/U90/Adult+Child Ortho	

Vision Premium: \$0	Vision Premium: \$0	% Change: n/a
Preferred Vision Plus for Small Business 10/25/	Preferred Vision Plus for Small Business 10/25/	
Ultimate Vision Plus for Small Business 10/25/1	Ultimate Vision Plus for Small Business 10/25/1	

[Download Member Roster](#)

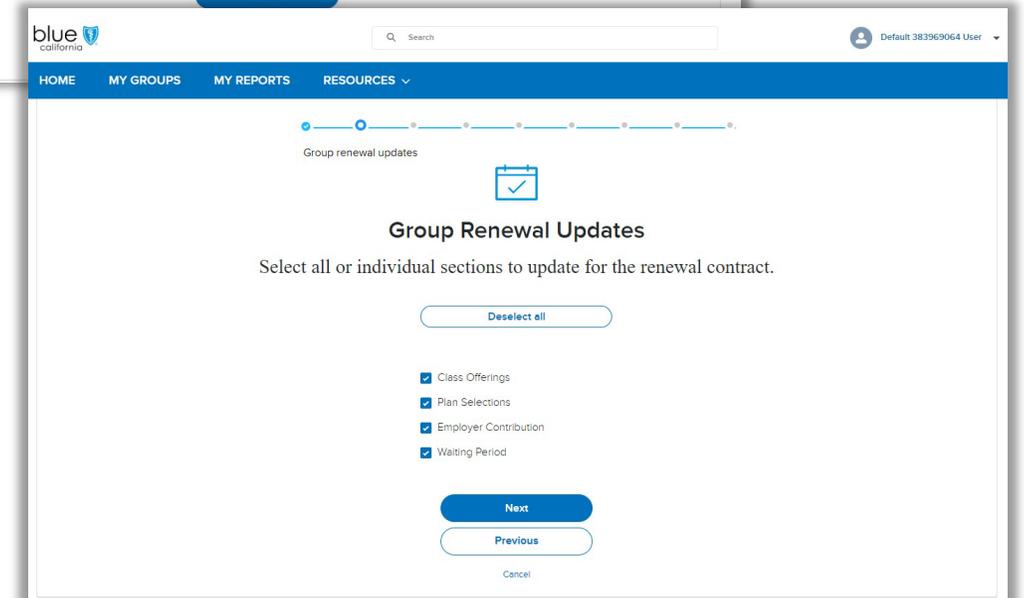
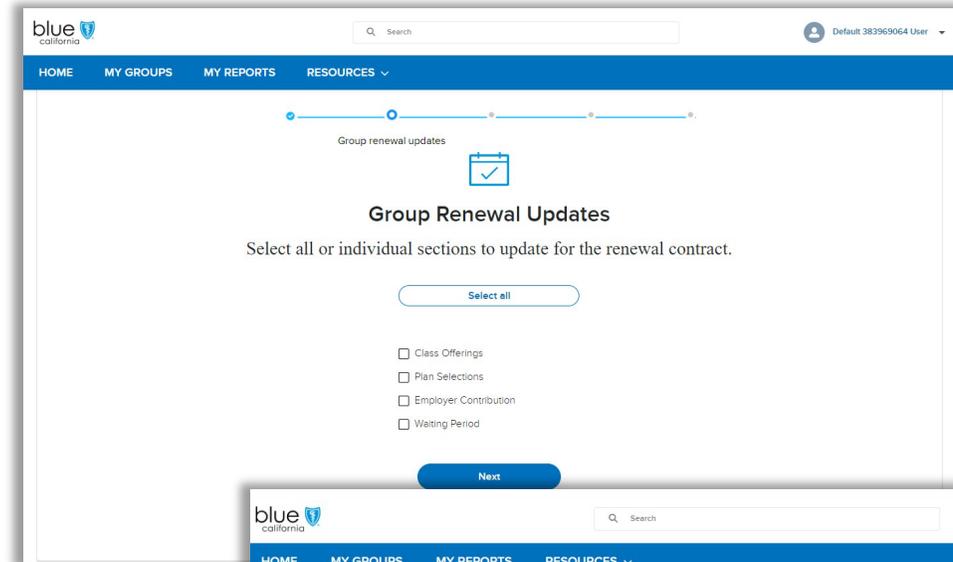
If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

Renewal - select the changes

Your clients are unique and so are their renewal needs. So instead of a one size fits all renewal workflow, we built a customizable workflow so you can address key changes and skip unnecessary steps.

Use the checkboxes to select the changes you want in your workflow. Select all, or just some and click Next.

If you select a change and realize you don't need to make a change, use the No Changes are Needed button to proceed to the next step.



Renewal – class plan

- The tool will display the current active classes.
- Select the checkboxes to add a new class.
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed

The screenshot shows the 'Class Offerings' page in the Blue Shield of California portal. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and user profile (Default 383969064 User) are in the top right. The main content area is titled 'Class Offerings' and contains instructions: '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 already offered cannot be re-selected.' Below this, a table shows the current offerings: 'ACTIVE CA ELIGIBLES' and 'ACTIVE OOS ELIGIBLES'. At the bottom, there are radio buttons for selecting a new class: 'Active out of state employees', 'COBRA California members', 'COBRA out of state members', and 'No changes are needed'.

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Search

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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 already offered cannot be re-selected.

The group currently offers the classes listed in the table

ACTIVE CA ELIGIBLES
ACTIVE OOS 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
 No changes are needed

Renewal - plan adds and cancels

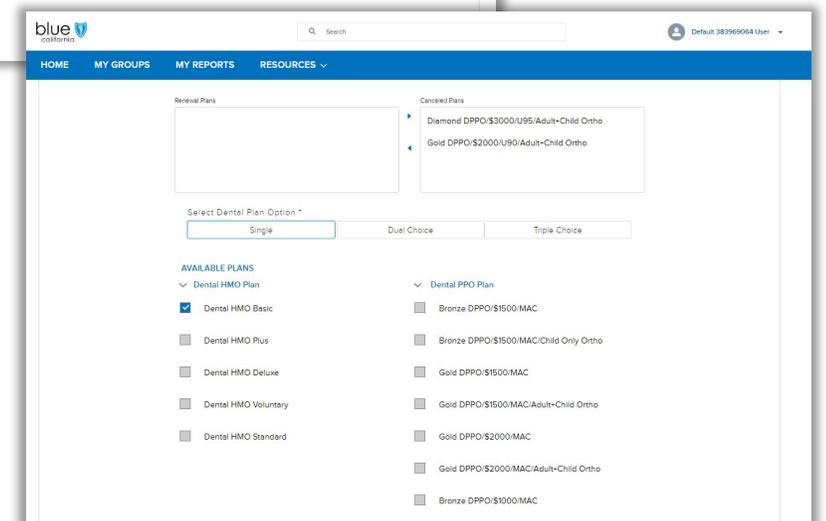
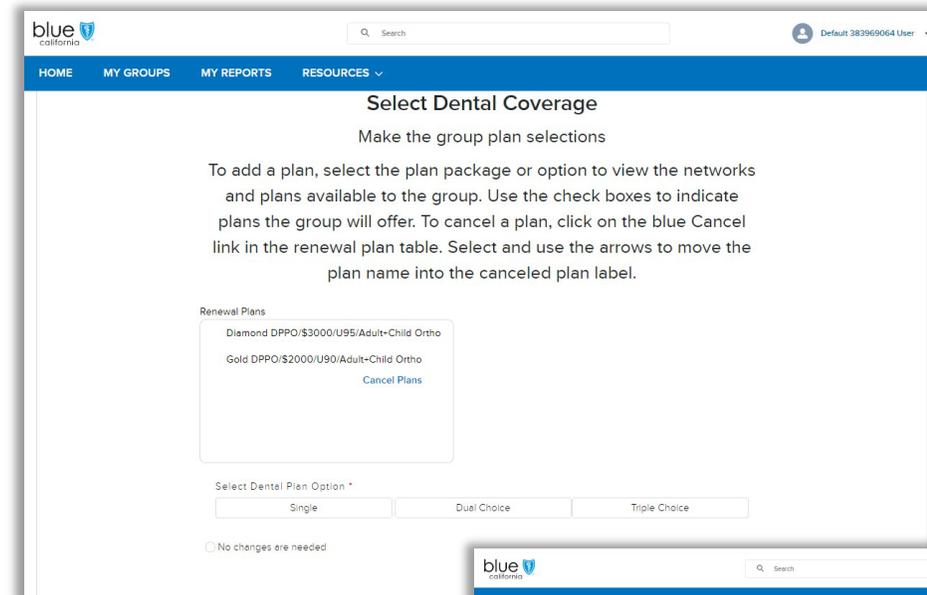
- Use the checkboxes to indicate if you are adding plans, canceling plans, or both
- Click on the product cards to edit or add plans for that product

Plans Adds

- Select the plan package and available network to view plans
- Check the boxes next to the plan name to add them to the group offerings

Plan cancels

- Click on the Cancel Plans link in the existing plans display box
- Click on the plan name you want to cancel and use the arrows to move the plan to the canceled plans box
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.



Renewal - contribution

- Use the checkboxes to select the offered products to make changes
- Select the checkbox to indicate if the contribution is a dollar amount or percentage amount and enter the desired amount
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.

The screenshot shows the 'Employer Contribution' page on the Blue Shield of California website. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and a user profile icon are in the top right. The main content area is titled 'Employer Contribution' and includes instructions: 'Make changes to the contribution amounts. 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.'

Under the heading 'Employer Contributions', there is a sub-section 'Choose the details you would like to modify' with a checked checkbox for 'Medical'. Below this, there are two contribution types: 'Subscriber Contribution' and 'Dependent Contribution'. Each has a radio button for '\$' and a radio button for '%'. The 'Subscriber Contribution' form shows the '%' option selected with the value '100' entered. The 'Dependent Contribution' form shows the '%' option selected with the value '0' entered. At the bottom, there is an unchecked radio button for 'No changes are needed'.

Renewal - waiting period

- Click on the drop-down menu to select an available waiting period rule for each class plan
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.

The screenshot shows the 'Eligibility Options' page in the Blue Shield of California portal. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and a user profile icon are also visible. The main content area is titled 'Eligibility Options' and contains the following text: 'Enter the new eligibility information in the respective section. Required fields must be completed before moving forward.' Below this, there is a section for 'Waiting Period' with a dropdown arrow. The instructions state: '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.' There are two rows of input fields: 'ACTIVE CA ELIGIBLES' and 'ACTIVE OOS ELIGIBLES', each followed by a date dropdown menu. At the bottom, there is a radio button for 'No changes are needed' and three buttons: 'Next' (solid blue), 'Previous' (outlined blue), and 'Cancel'.

Start Open Enrollment from dashboard

Navigate to member-level changes when not combining with group-level submission

On the renewal dashboard, select Start Open Enrollment from the Action menu

Submission tips

- Only member cancelations and plan changes are available in the renewal workflow
- Use the maintenance workflows to enroll new employees or update existing member information

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
			Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
			Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
			Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼		Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

View real-time renewals

View your client's coverage and offerings before making renewal changes for both group and member level renewal changes.

This information is updated real time as changes occurring in EET or other channels are submitted and processed by Blue Shield.

You can also view the renewal information and decide to not make changes and exit out of the workflow by clicking on Cancel.

The screenshot shows the Blue Shield of California user interface for viewing renewal information. The page title is "Renewal Information" and the main heading is "It's time to renew". Below the heading, a message states: "Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping." A table provides account details: Account Name (COMPANY X), Group ID (W0126547), and Renewal Date (05/01/2024). The page is divided into two columns: "Current Year" and "Renewal Year". The "Current Year" column lists: No of employees (9), No of covered members (7), No of covered dependents (0), Infertility Rider (No), and Total premium (\$100). The "Renewal Year" column lists: No of employees (9), No of covered members (7), No of covered dependents (0), Infertility Rider (No), Total premium (\$105), and % Change (5%). Below these columns, there are sections for "Dental Premium: \$0" and "Vision Premium: \$0". Each section shows two plan options with a "Change" button. The dental plans are "Diamond DPPO/\$3000/U95/Adult+Child Ortho" and "Gold DPPO/\$2000/U90/Adult+Child Ortho". The vision plans are "Preferred Vision Plus for Small Business 10/25/1" and "Ultimate Vision Plus for Small Business 10/25/1". A "Download Member Roster" button is located at the bottom. A footer note states: "If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next."

Account Name	Group ID	Renewal Date
COMPANY X	W0126547	05/01/2024

Current Year		Renewal Year	
No of employees	9	No of employees	9
No of covered members	7	No of covered members	7
No of covered dependents	0	No of covered dependents	0
Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

Dental Premium: \$0	Dental Premium: \$0	% Change: n/a
Diamond DPPO/\$3000/U95/Adult+Child Ortho	Diamond DPPO/\$3000/U95/Adult+Child Ortho	
Gold DPPO/\$2000/U90/Adult+Child Ortho	Gold DPPO/\$2000/U90/Adult+Child Ortho	

Vision Premium: \$0	Vision Premium: \$0	% Change: n/a
Preferred Vision Plus for Small Business 10/25/1	Preferred Vision Plus for Small Business 10/25/1	
Ultimate Vision Plus for Small Business 10/25/1	Ultimate Vision Plus for Small Business 10/25/1	

[Download Member Roster](#)

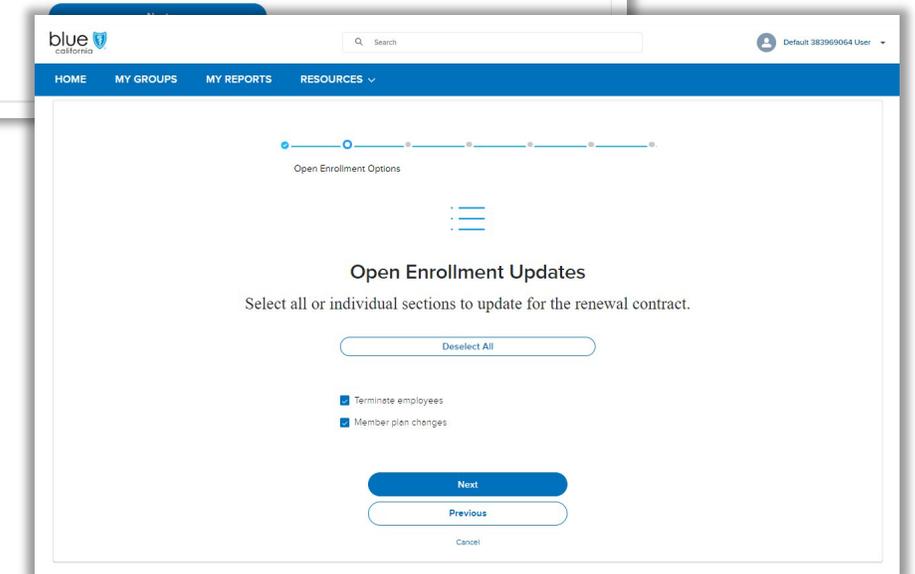
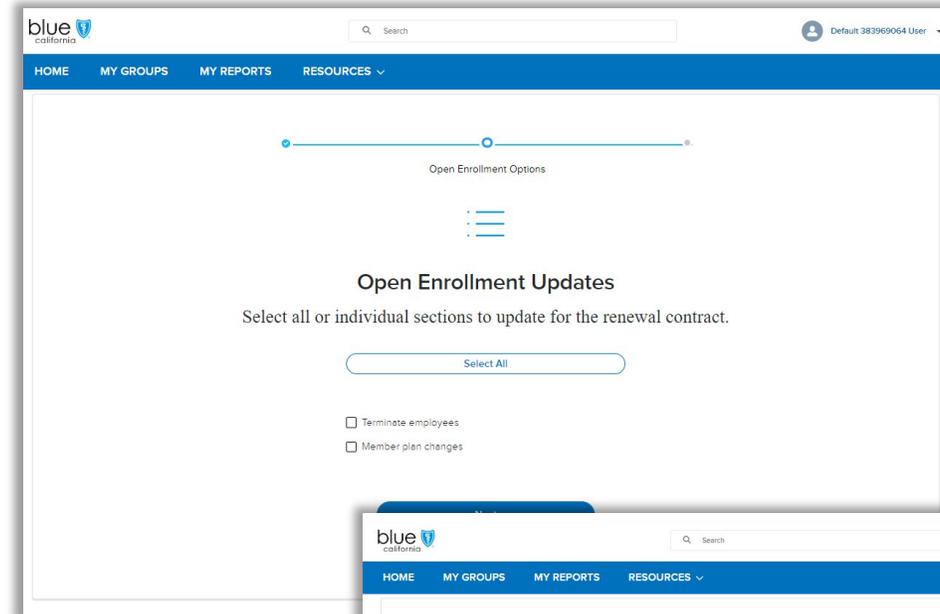
If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

Open Enrollment - select the changes

Your clients are unique and so are their renewal needs. So instead of a one size fits all renewal workflow, we built a customizable workflow so you can address key changes and skip unnecessary steps.

Use the checkboxes to select the changes you want in your workflow. Select all, or just some and click Next.

If you select a change and realize you don't need to make a change, use the No Changes are Needed button to proceed to the next step.



Open Enrollment cancel

- Use the toggle button to select Enter Terminations
- 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

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employee's name from the group roster below then provide the cancellation information.

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

1234

Member Name Member ID Termination Date Benefit End Date Cancel Reason CalCOBRA Eligible CalCOBRA Eligible Reason

Member A 123456789 Select an Option Select an O... Select an Option

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Apply to all Selected Employees

Member Name Member ID

Member Name Member ID Termination Date Benefit End Date Cancel Reason CalCOBRA Eligible CalCOBRA Eligible Reason

Member A 123456789 Member B 123456789 Member C 123456789

May 2024

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 30 31

Today

Previous 1 Next

Open Enrollment – member bulk cancelations

- Use the toggle button to select Upload File
- 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 eligible, enter in the CalCOBRA notification columns
 - Yes for CalCOBRA replaces the CalCOBRA notification form
- 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 shows the 'Terminate Employees' web interface with a modal window for uploading a file. Below it is a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F
	Member Name	Member ID	Termination Date	Cancel Reason	CalCOBRA Eligible	CalCOBRA Eligible Reason
1						
2	Name A	123456789	04/30/2024	Military Active Duty	No	
3	Name B	123456789	04/30/2024	Cancel Per Request	Yes	Termination or Resignation
4	Name C	123456789	04/30/2024	Cancel Per Request	Yes	Termination or Resignation
5	Name D	123456789	04/30/2024	Cancel Per Request	No	
6	Name E	123456789	04/30/2024	Cancel Per Request	No	
7	Name F	123456789	04/30/2024	Termination of Employment	Yes	Termination or Resignation
8	Name G	123456789	03/31/2024	Termination of Employment	Yes	Termination or Resignation
9	Name H	123456789	05/30/2024	Termination of Employment	Yes	Termination or Resignation
10	Name I	123456789	05/30/2024	Termination of Employment	Yes	Termination or Resignation
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Open Enrollment – member bulk plan changes

- 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
- Click on the Plan menu and select an available plan in the menu
- Click on the Action menu and select Assign Plans
- Repeat these steps for all subscribers in the roster

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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 Plans Actions

Subscriber Name	Member ID	Plan
<input checked="" type="checkbox"/> Member A	123456789	Gold Full PPO 0/35 OffEx
<input checked="" type="checkbox"/> Member B	123456789	Gold Trio HMO 0/35 OffEx
<input checked="" type="checkbox"/> Member C	123456789	Gold Access+ HMO (R) 0/35 OffEx
<input checked="" type="checkbox"/> Member D	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member E	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member F	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member G	123456789	Gold Full PPO 0/35 OffEx

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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 Gold Trio HMO 1500/35 OffEx Actions

Assign Plans
Reset
Clear All

Subscriber Name	Member ID	Plan
<input checked="" type="checkbox"/> Member A	123456789	Gold Full PPO 0/35 OffEx
<input checked="" type="checkbox"/> Member B	123456789	Gold Trio HMO 0/35 OffEx
<input checked="" type="checkbox"/> Member C	123456789	Gold Access+ HMO (R) 0/35 OffEx
<input checked="" type="checkbox"/> Member D	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member E	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member F	123456789	Gold Access+ HMO (R) 0/35 OffEx
<input type="checkbox"/> Member G	123456789	Gold Full PPO 0/35 OffEx



Support

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

Additional resources for enrollment and eligibility support:

- [2024 Admin Guide](#)
 - [Employer Enrollment Tool Maintenance guide](#)
 - [Tutorial video library](#)
-

Need to talk to someone?

- Chat us!
- Small Group Broker Services
(800) 559-5905