Employer Enrollment Tool

Small Business Quote & New Group Application Guide

Last updated August 14, 2023

blue california

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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.

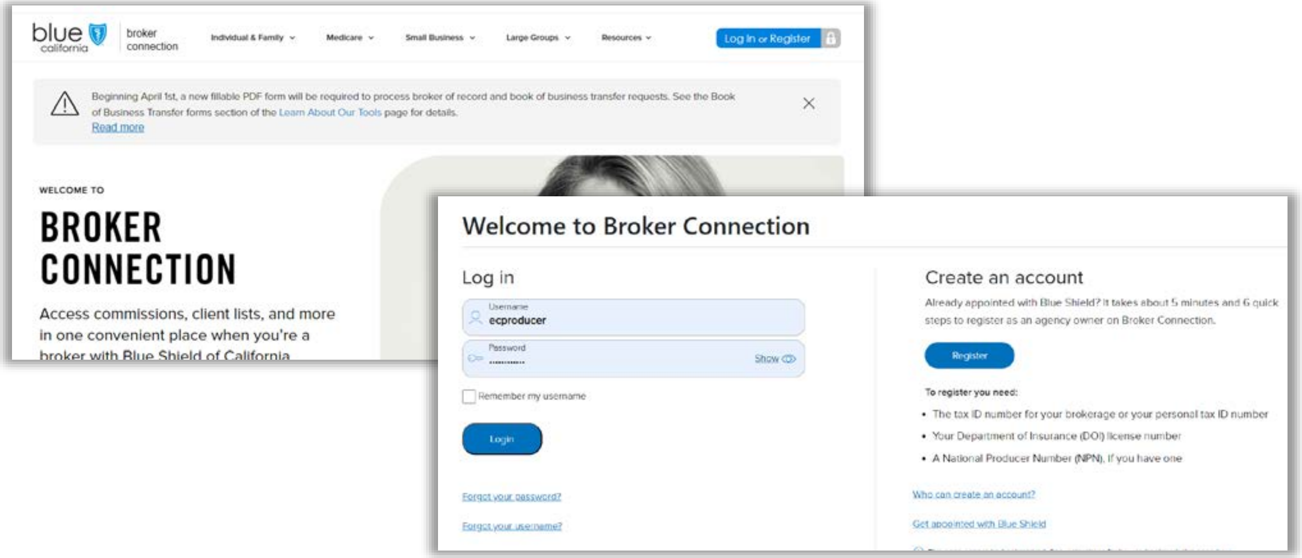
Navigate to the tool

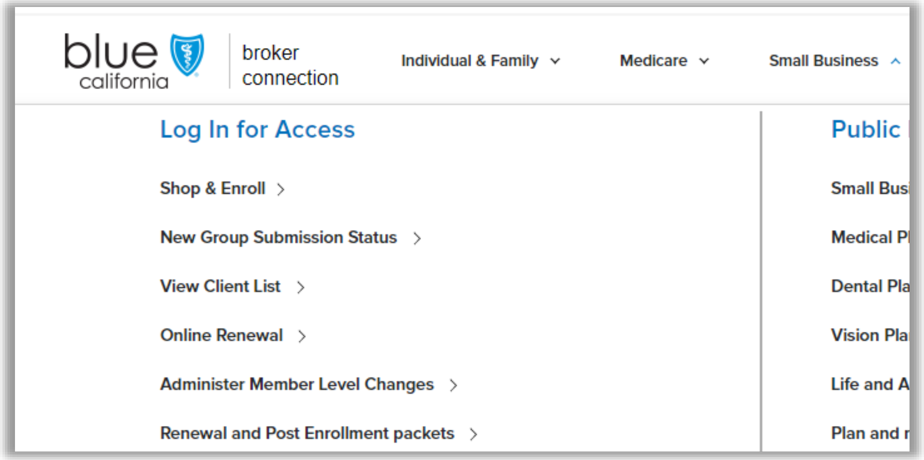
Broker access point

- Broker Connection top navigation link “Shop & Enroll”
- Authenticate user and SSO into Employer Enrollment Tool

Login credentials and Tax ID sharing

- Users will use their Broker Connection login
- Users who currently share Tax ID logins will continue to do so in the tool
- The tools pulls profile information from Broker Connection and ICM to match commissions, sales assignments, and user profiles





Navigation bar

Search bar

- allows the user to search records they have permission to view, including quotes and enrollments

Home

- returns the user to the Employer Enrollment Tool home page

My Groups

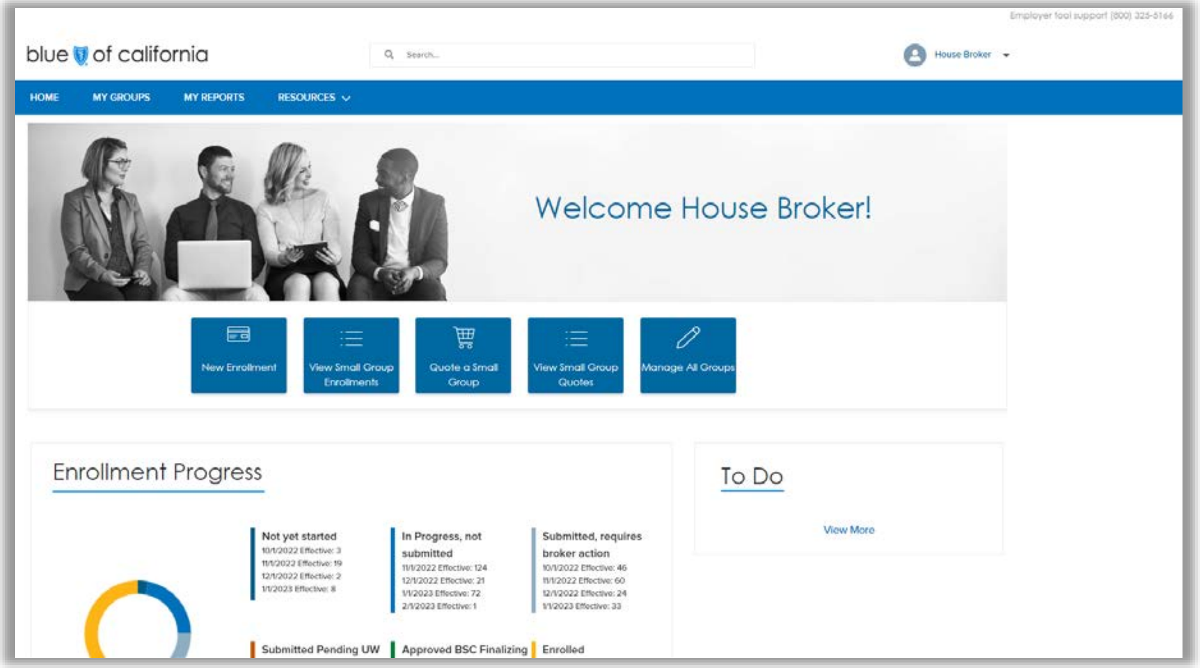
- displays the company account

My Reports

- gives you access to run and export reports for your book of business or individual clients

Resources

- links the broker to User Guide, Tips and Tricks, and a tool resource page with additional information.



Quick Action Buttons

New Enrollment

- Begin and submit a new enrollment application

View Small Group Enrollments

- View your in progress and completed group enrollment applications

Quote a Small Group

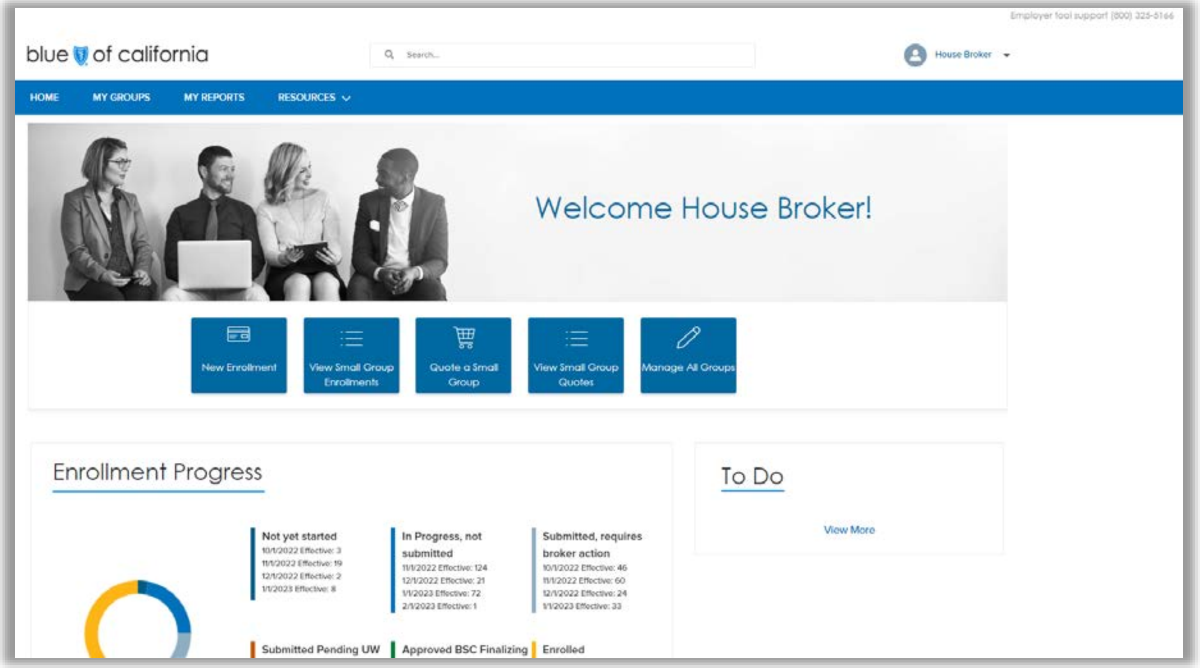
- Run a quote for Blue Shield plans

View Small Group Quotes

- View your in progress and completed quotes

Manage All Groups

- Access your book of business for benefits administration and more



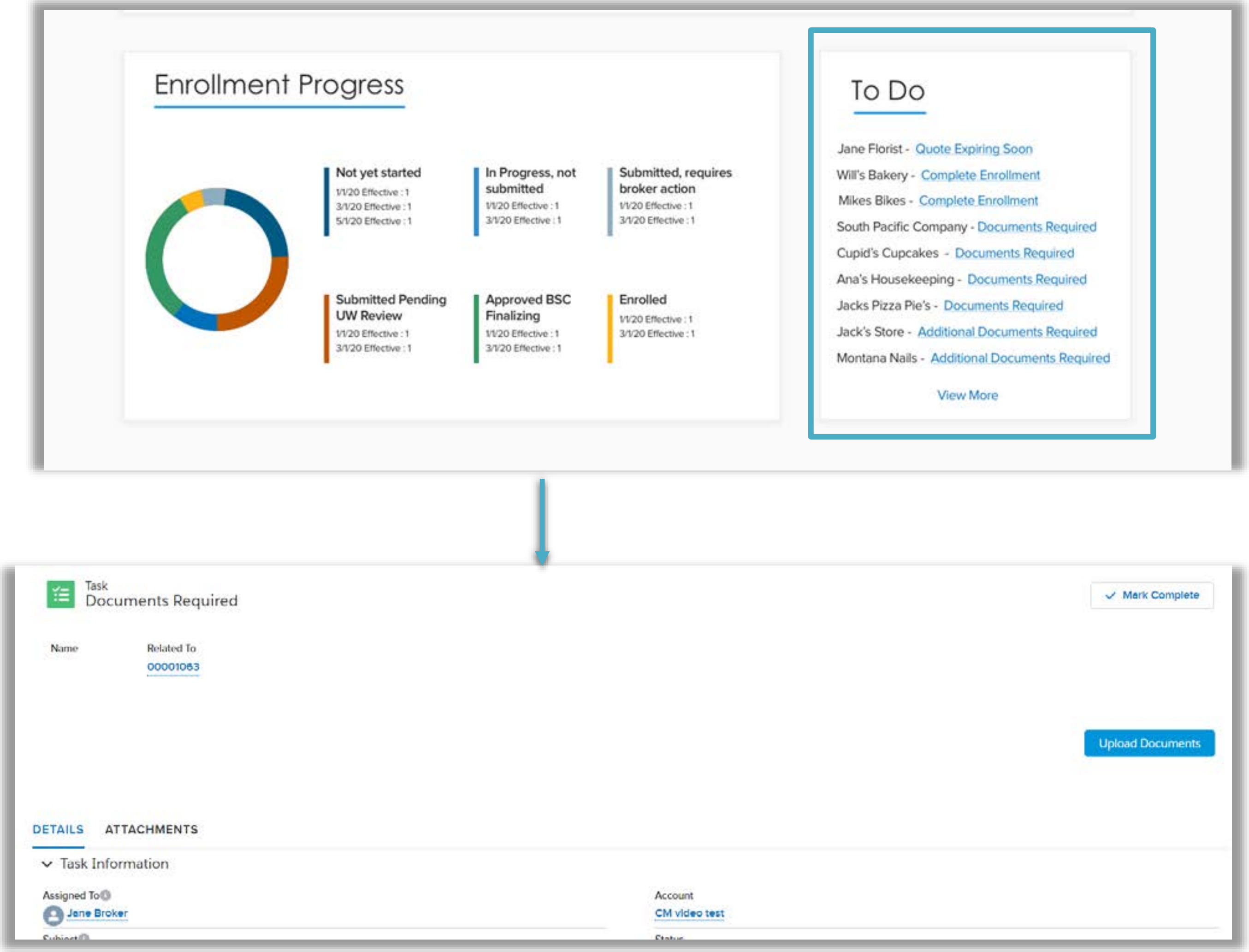
To Do List

The To Do list, located to the right of the Enrollment Progress section, lists important tasks for the user to complete.

Tasks are shown as links that users can click to access the location to complete the pending item.

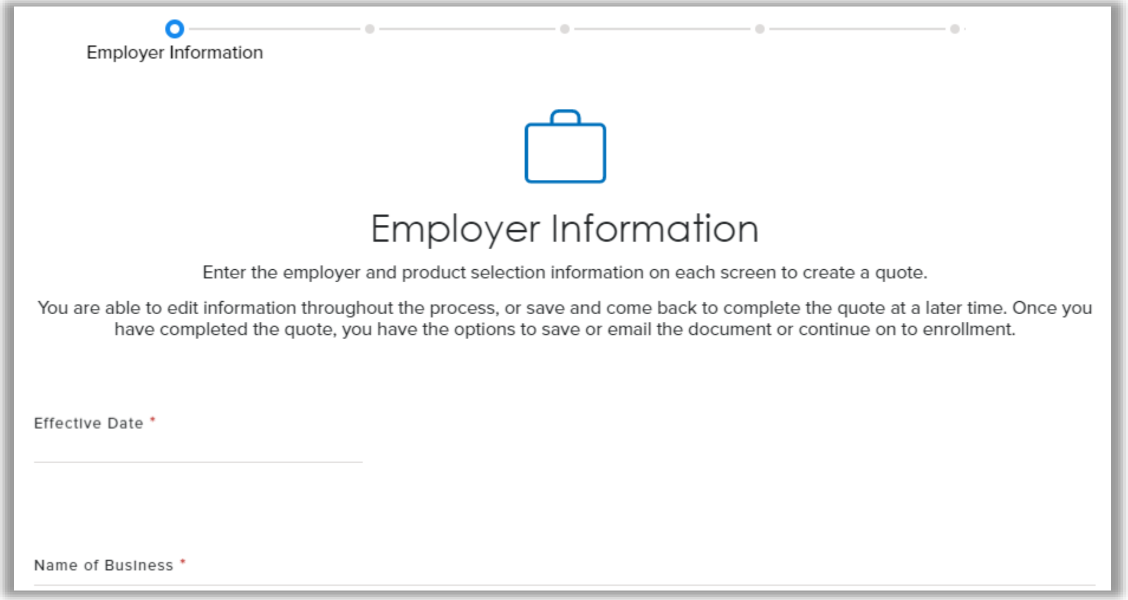
Tasks include expirations, completions, and document requests.

Document upload is a commonly used task to provide documentation required for applications.



Quote a Small Group

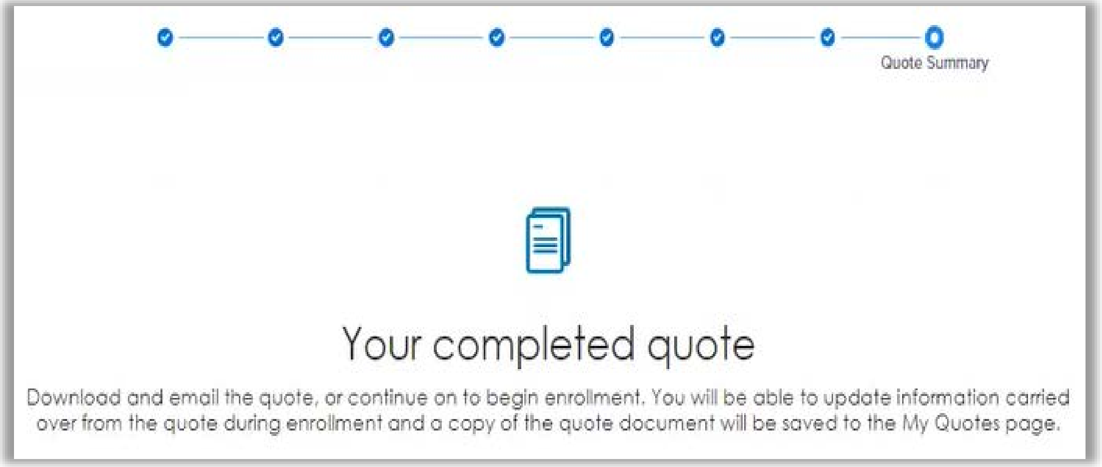
- Quote begins with **Employer Information**
  - Effective date, group name, and number of eligible employees are required fields
  - Tax ID and SIC code are optional fields
- An employee census file can be uploaded or added individually to the **Employer Census** page
  - Users can download a census template from this page or use an CSV file of their own
- 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



- 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.

  Follow these steps to retrieve the PDF quote proposal:

  - From the Employer Enrollment Tool landing page, click on View Quotes
  - A list of quoted groups is displayed. Click on the hyperlinked name of the group under the Quote Name column
  - In the Files section, click on the PDF file link to open and download the quote proposal.



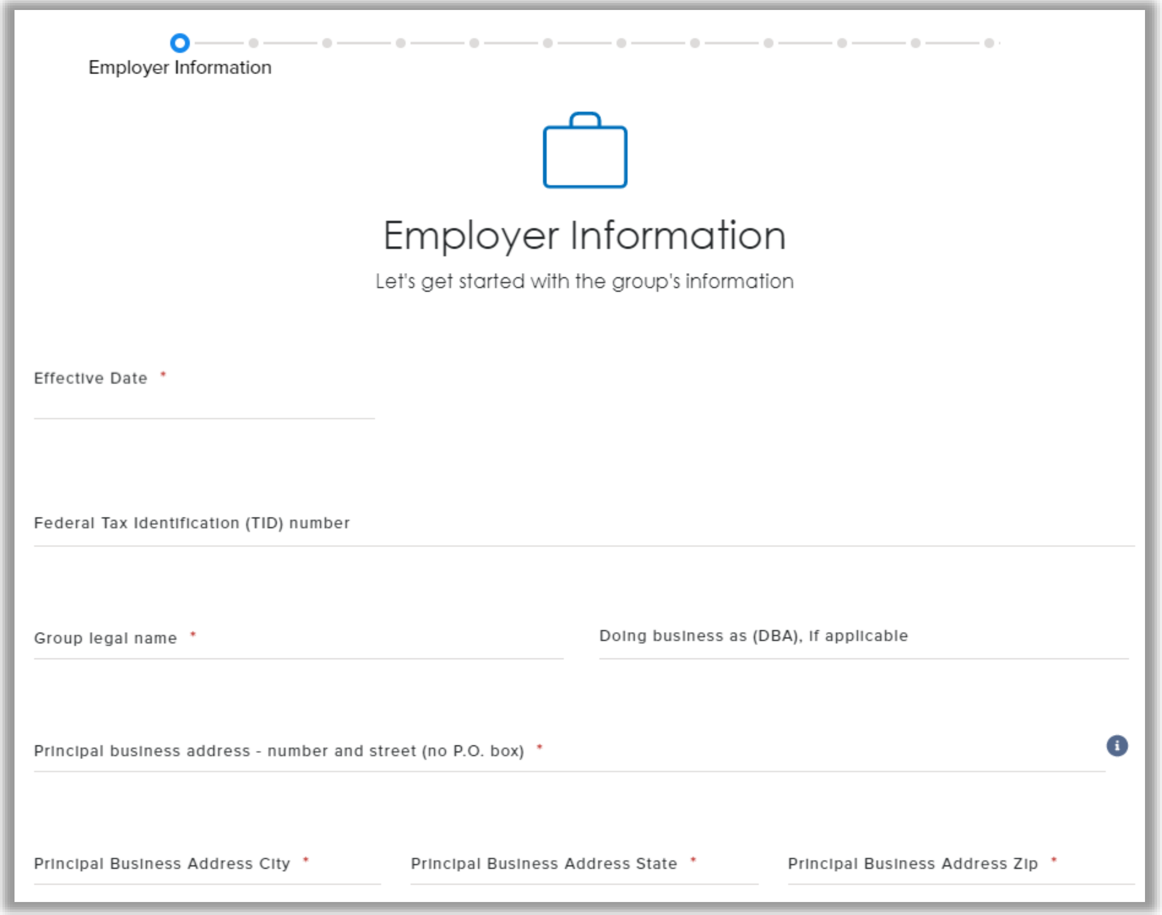
New Group Enrollment

1. Enrollment begins on Employer Information with the collection of basic group info (name, address, # of enrolling, etc.)

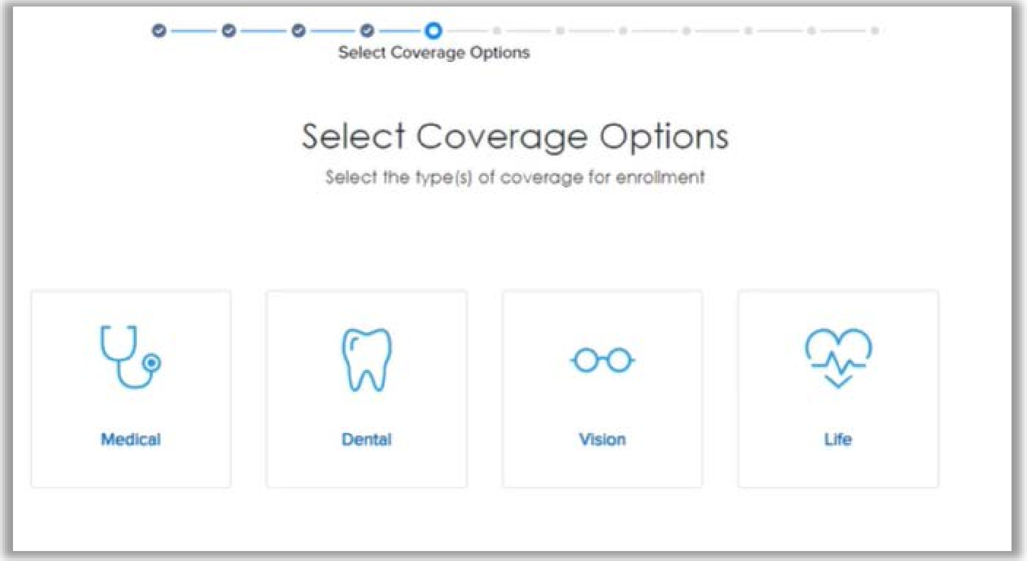
2. The Additional Group Information page collects information for the group contact and entity type

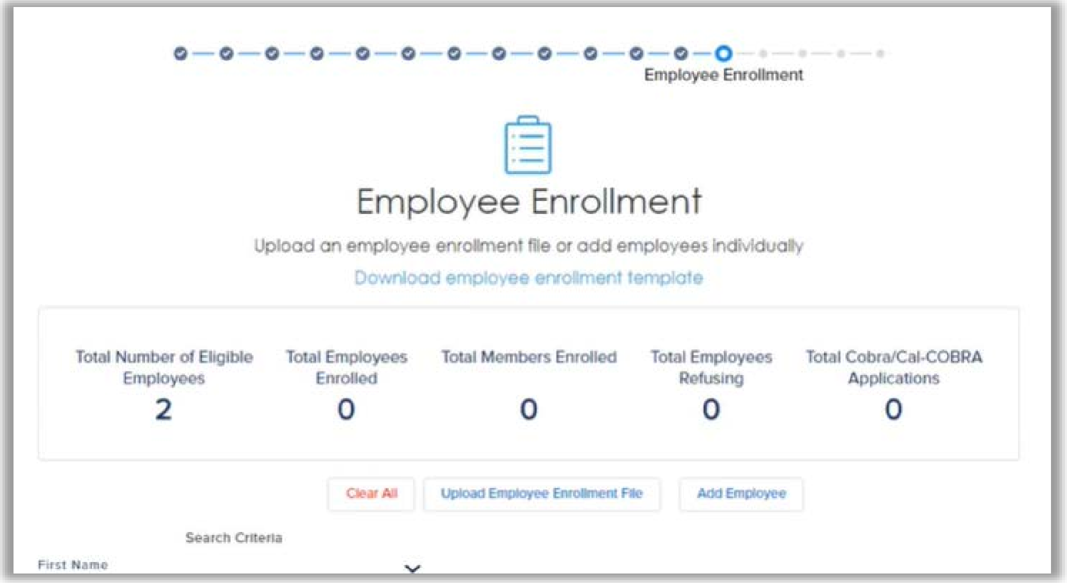
3. Other Group Coverage collects previous group coverage, if BSC is being offered alongside another carrier, and COBRA information

4. Group Eligibility and Options page collects employee counts, group eligibility, additional group information, and waiting periods



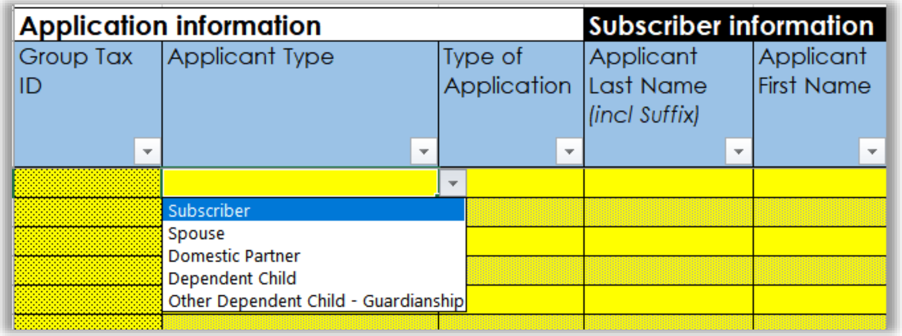
5. Product selections are made on the Select Coverage Options pages
6. Employer Contributions collects the contribution for subscribers and dependents for each product offered
7. The Broker Information page collects to ensure commission is assigned correctly
8. Employee Enrollment collects the information from the EEA application or spreadsheet. Users will be able to upload a filled-out spreadsheet or manually enter the employee information directly into the tool.

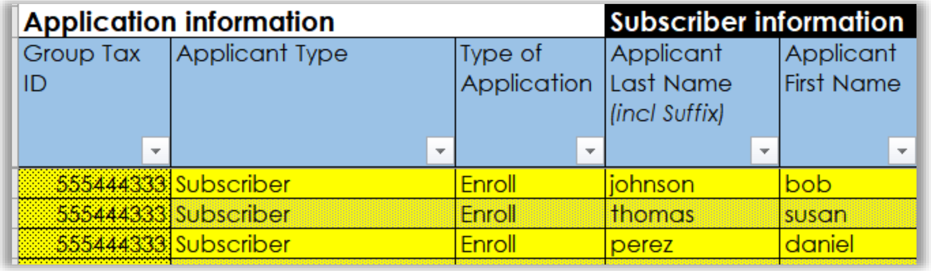


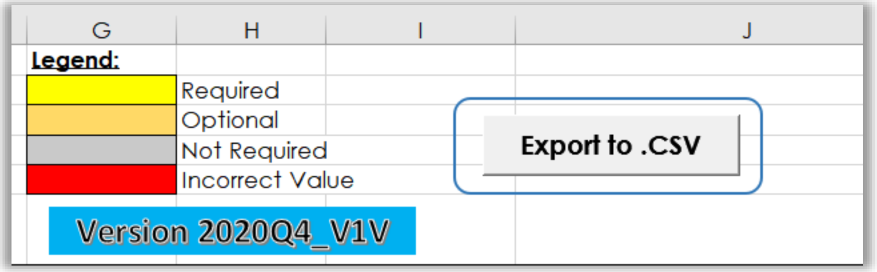


Enrollment Spreadsheet

- Use the same Enrollment Spreadsheet file to upload the employee enrollment information to the tool. The Spreadsheet is used for both enrolling and refusing employees.
- The Spreadsheet is located under the forms & applications page on Broker Connection.
- Always use the most current file version for your submissions.
- Enter the employee information into the yellow required cells. Dropdown selections will appear when you click into the cell.
- Information moves across the workbook, so scroll right to make sure all yellow required fields are completed.
- When you have completed entering the employee information, click on the Export to .CSV button at the top of the workbook.
- The conversion to CSV may take your computer a minute or two to complete, this is normal.
- The converted CSV will automatically save to your desktop. Use this file from your desktop when uploading the Spreadsheet into the enrollment tool.



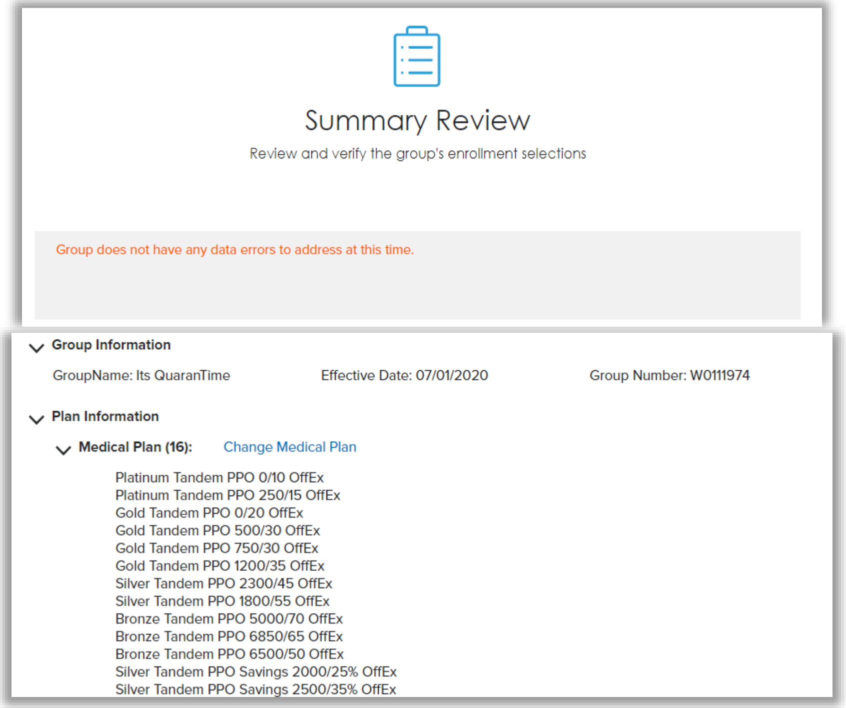


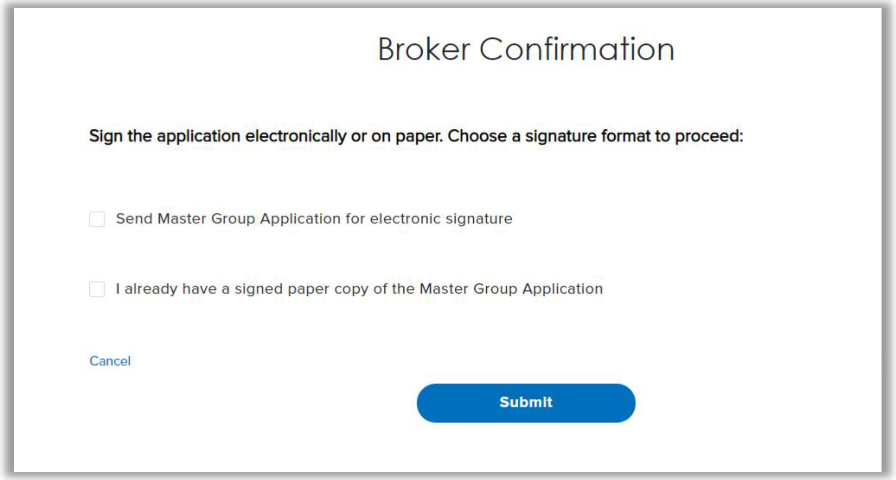


9. Summary Review page will go through a review of plans selected, number of employees enrolling, group monthly rate, etc. Users can also download the filled-out MGA form

10. Broker Confirmation page and will have to choose one of the two signature process to proceed
The user can select to attest as being the broker who assisted the client and to attest that they have the completed application on file. When the user selects signed paper copy, additional attestation statements appear on the page.
    - Attestation statements have not changed.
    - The user checks the boxes next to the attestations and provides their name and date before selecting "Submit".
    - Application flow will be the same as now no change.

The user can select eSignature to capture the employer and broker signatures of the application. When the user selects eSignature, signatory contact fields appear on the page.
    - The authorized group representative field is prepopulated with Primary Contact details from earlier in the application.
    - The producer field is prepopulated with the details of the logged in user.
    - Users can edit and update the contact fields if needed.
    - The user must confirm the signatory information before proceeding to the next page.

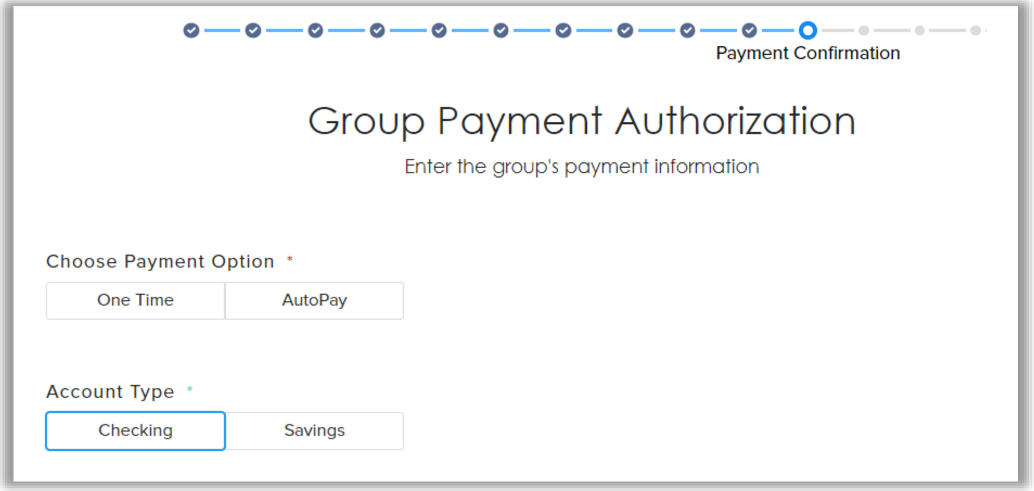


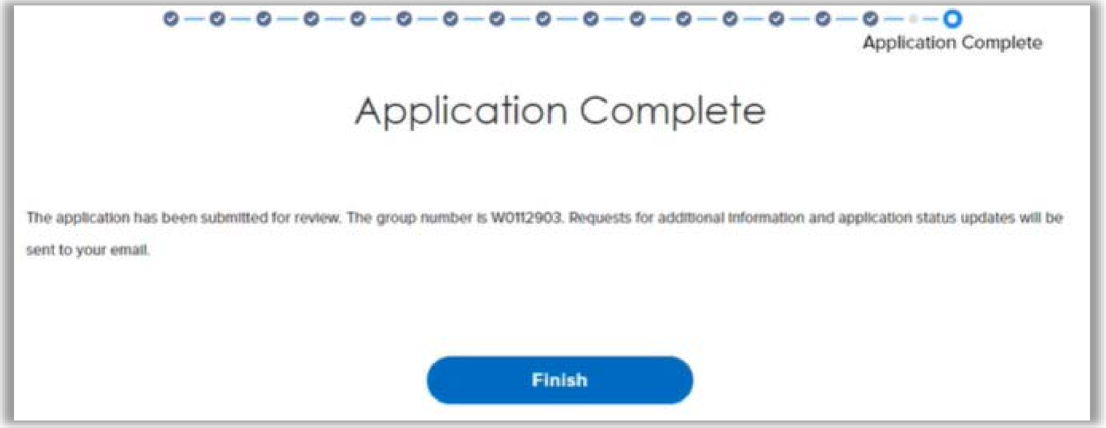


11. Group’s Initial Premium Payment page collects information for the ACH payment. This payment will not process until the group has been confirmed in Facets.
    - **New!** Select Autopay to use the entered ACH information for future monthly payments

12. The Review page will advise the user of any supporting documents that are needed. Broker has the option of uploading now to proceed to review or upload later

13. The user will complete the process with a final page showing one of three options:
    1. Groups that go straight to Facets will receive a message confirming the application approval.
    2. Groups that require a review will receive a message that the application has been submitted and will be reviewed
    3. Groups that require a review and did not provide documents during enrollment will receive a message that the application has been submitted and will only be reviewed when the documents are uploaded.





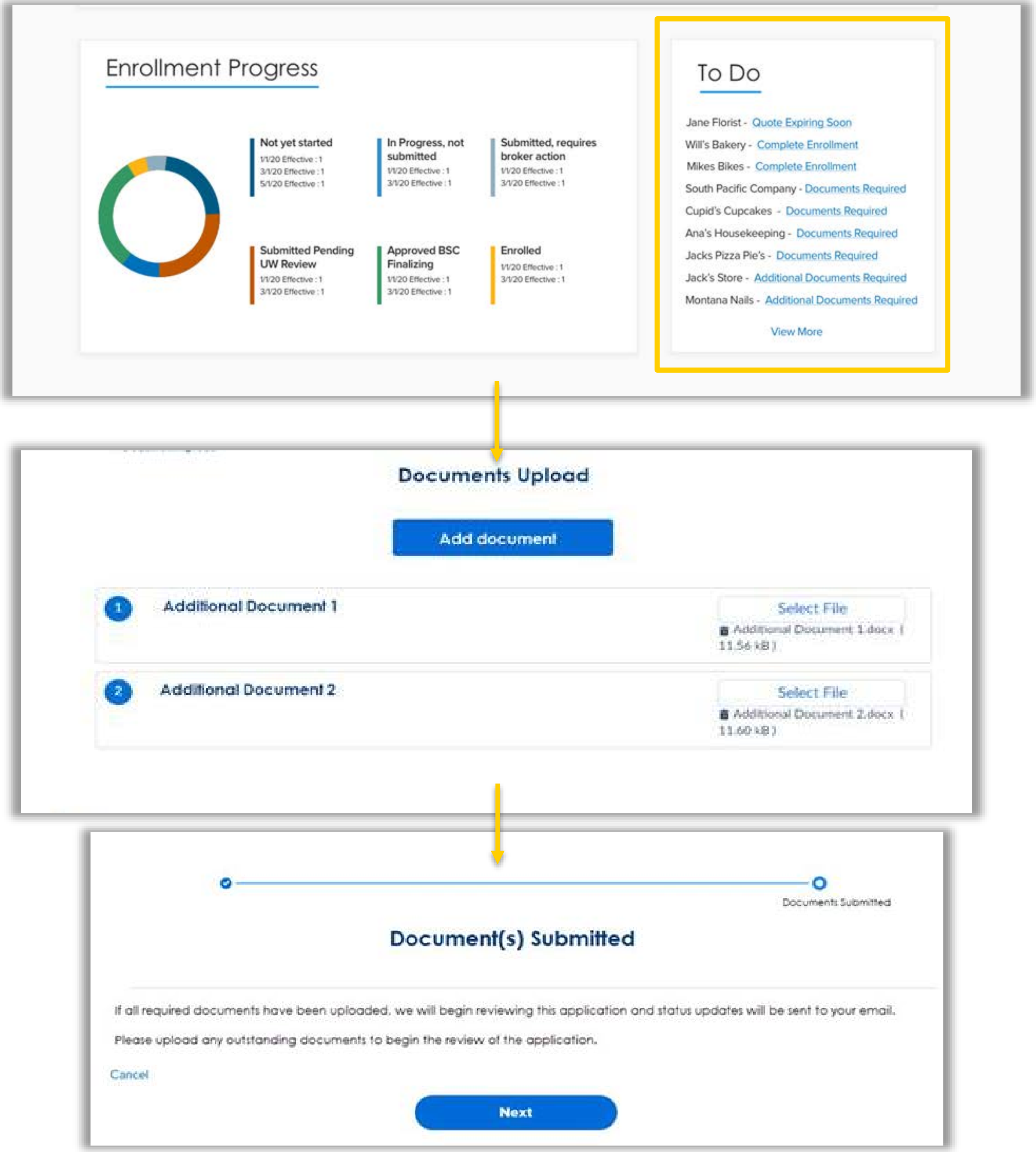
Document upload

Applications may require review and that means we need some additional information about the enrolling group.

You can provide documentation during the enrollment submission or after the enrollment submission. We even let you upload the partial list and upload the rest later – just use the "will upload later" checkbox.

Follow these steps to upload documents to an application after it has been submitted:

1. Log into the Employer Enrollment Tool and click on the Documents Required link next to the group's name in your To Do list.
2. It will take you to a "sub page" with a button in the top right that says Upload Documents.
3. Click on the button on this button
4. You will land on a page titled Review that looks like the document upload page from the enrollment flow. The list of required files is displayed.
5. Click on Select File to grab and upload the document
6. When you are done adding files, click on the Next button at the bottom of the screen.



Employer Enrollment Tool Document Management

Quote Proposal PDF

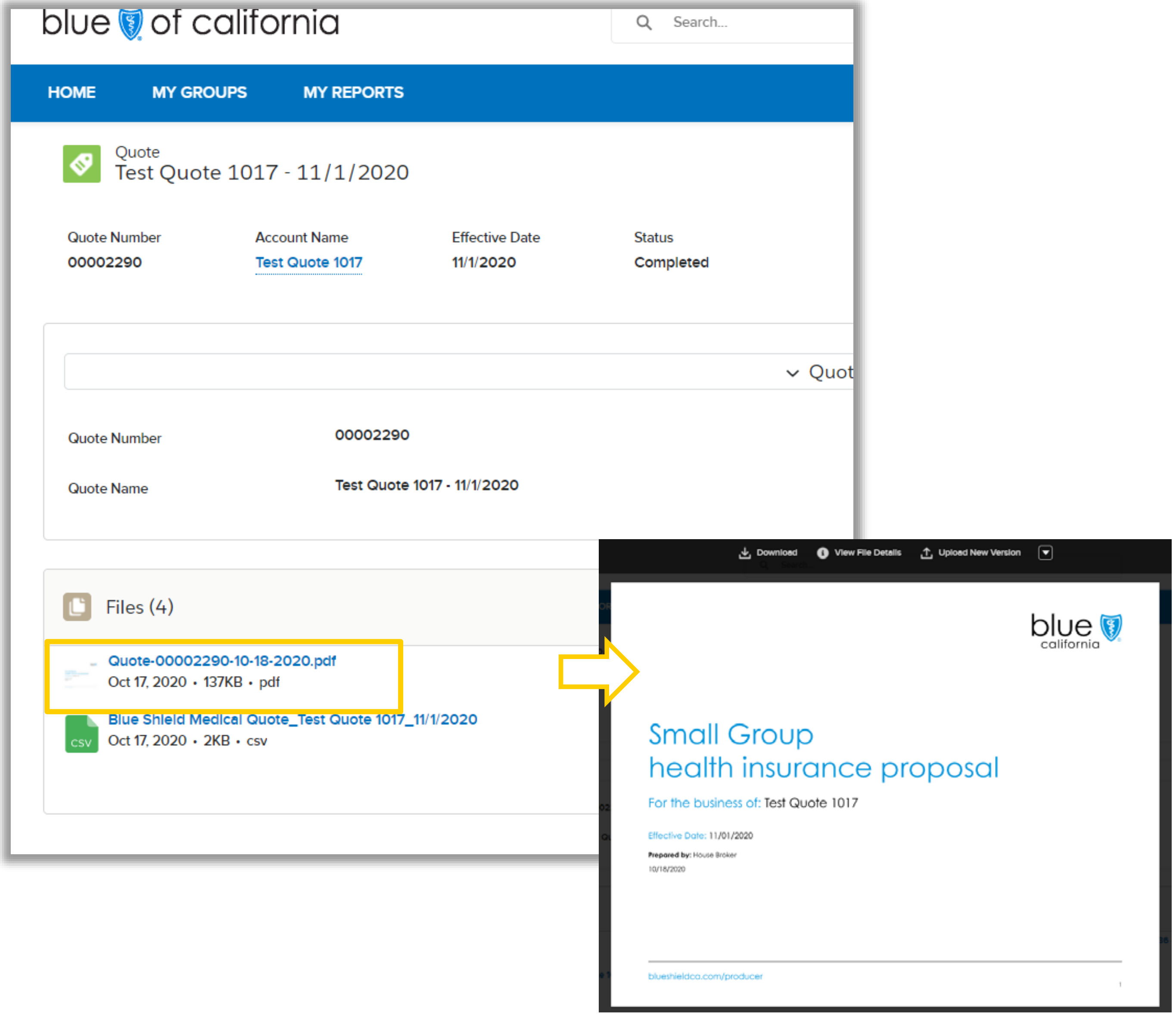
PDF Quote proposals can be requested once the quote is completed.

The file will become available once you receive an email that the proposal has been successfully created.

Follow these steps to retrieve the quote proposal:

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

Users can still download the CSV quote file in addition to requesting a PDF.



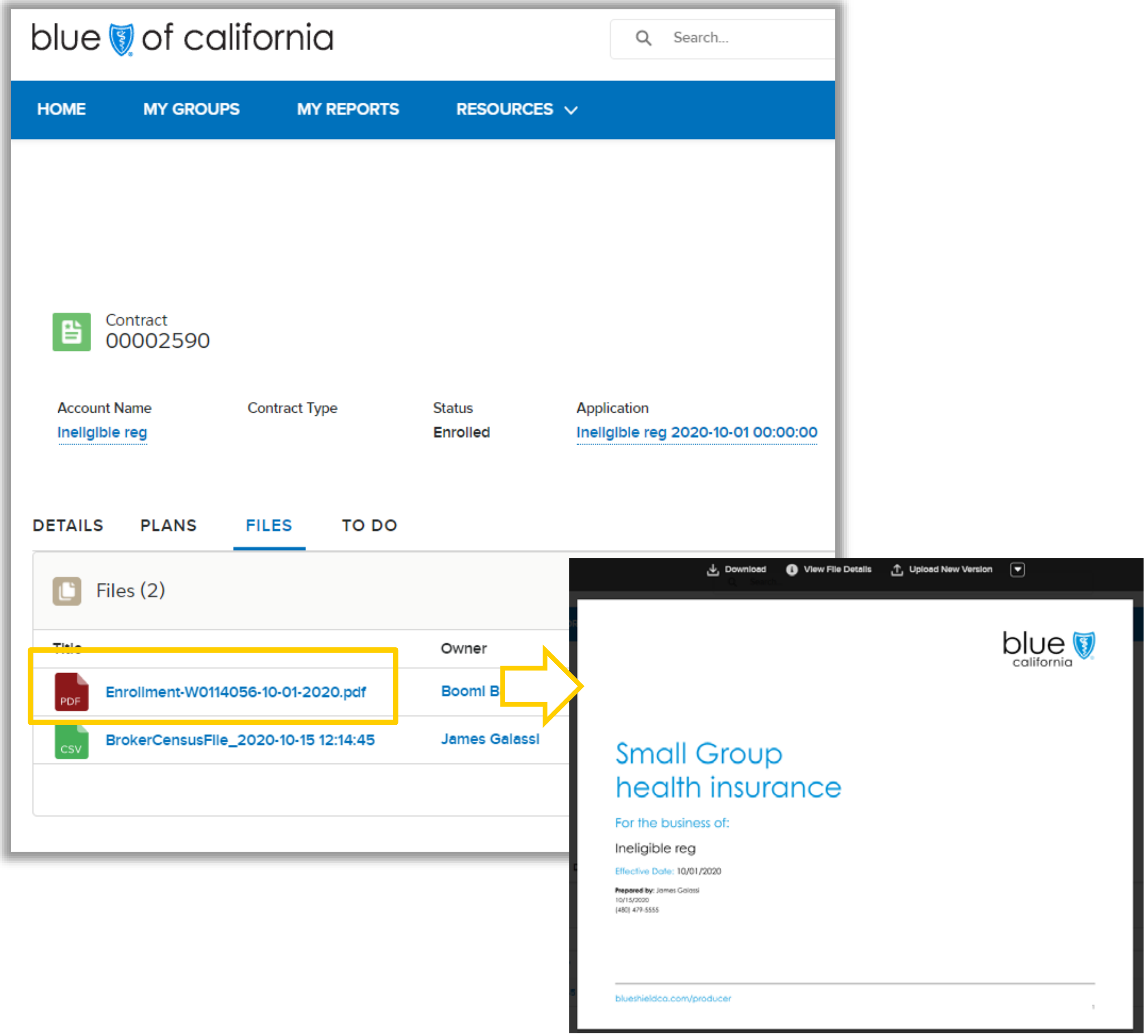
Enrollment Proposal PDF

Member ID numbers can be self-serviced within the tool through the Enrollment census PDF file.

The file will become available once you receive an email that the group has been successfully installed.

Follow these steps to retrieve Enrollment census:

1. From the Employer Enrollment Tool landing page, click on View Enrollments
2. Use the filter to select My Enrollments Completed
3. A list of enrolled groups is displayed. Click on the hyperlinked contract number of the group under the Contract Number column
4. Select the Files tab
5. Click on the PDF file link to open and download the Enrollment proposal.



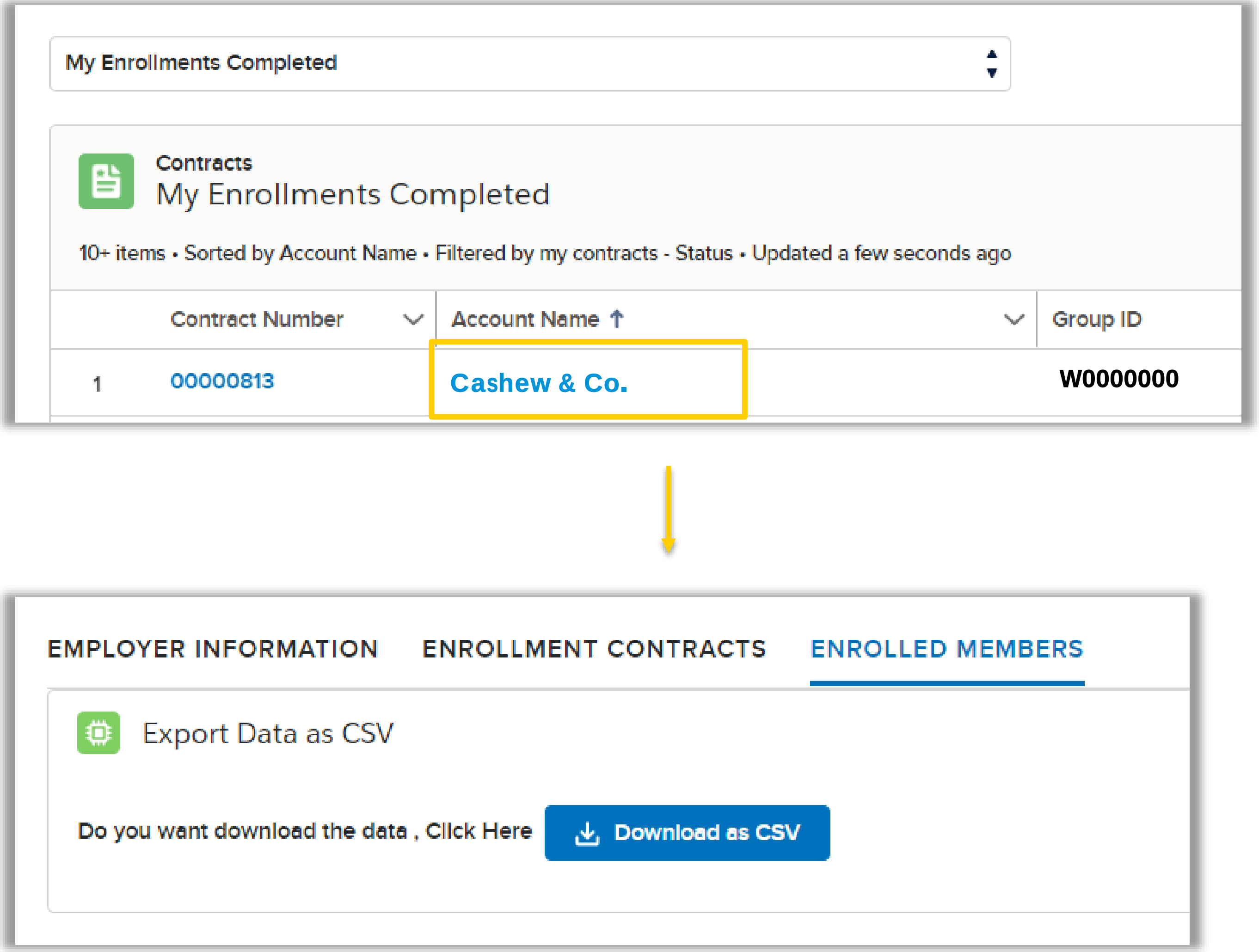
Enrollment Proposal CSV

Member ID numbers can be self-serviced within the tool through the Enrollment census CSV file.

The file will become available once you receive an email that the group has been successfully installed.

Follow these steps to retrieve Enrollment census:

1. From the Employer Enrollment Tool landing page, click on *View Enrollments*
2. A list of enrolled groups is displayed. Click on the hyperlinked name of the group under the Account Name column
3. Select the Enrolled Member tab
4. Click on the *Download as CSV* button
5. The download will load in the bottom of the browser window
6. Click on the file download to open the CSV



View Quotes

[Watch a tutorial.]

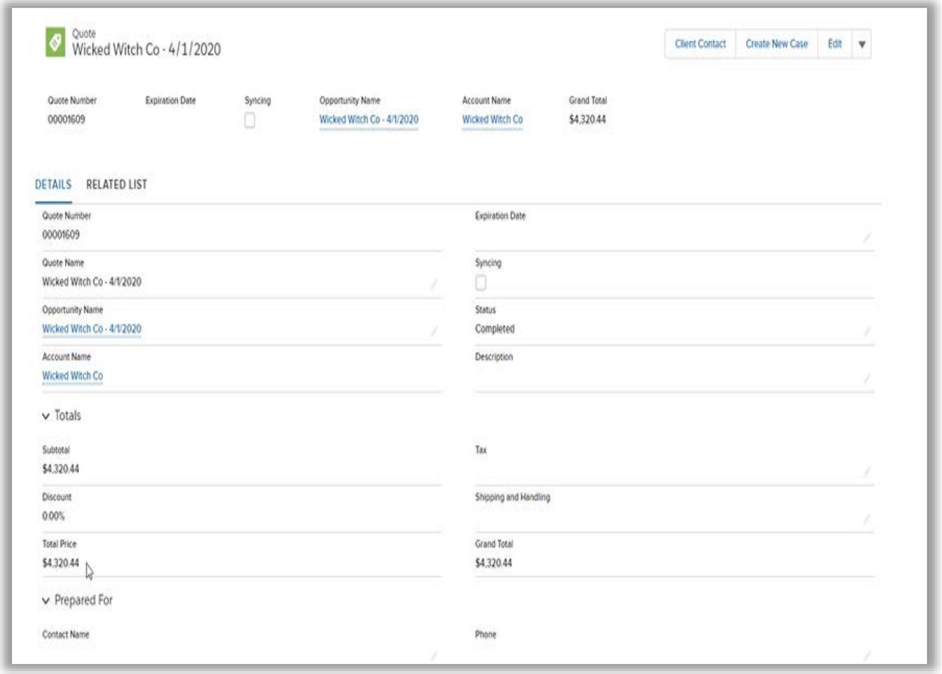
From the home page, click View Quotes.

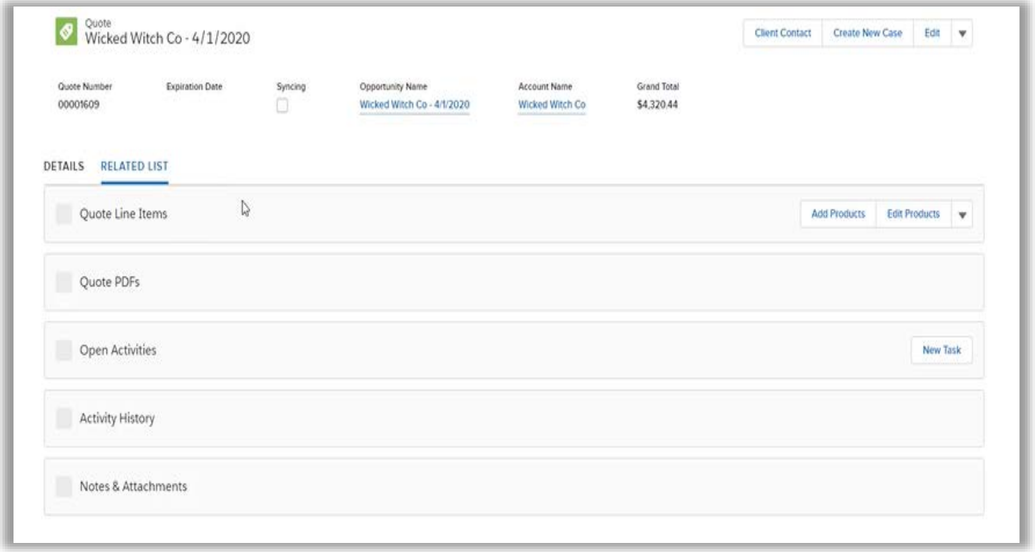
- A list of group quotes will populate.
- As needed, search quotes by name using the Search box. Once the desired quote has been located, click the quote name to view all group and quote details.

Click the RELATED LIST tab to view the following information by expanding the appropriate sections.

- Quote Line Items – see all plans and premiums
- Quote PDFs
- Open Activities
- Activity History
- Notes & Attachments

If desired, use the triangle list on the main quote page to continue a quote you have saved for later. The user will be brought back to the remaining pages to complete.





View Enrollments

[Watch a tutorial.]

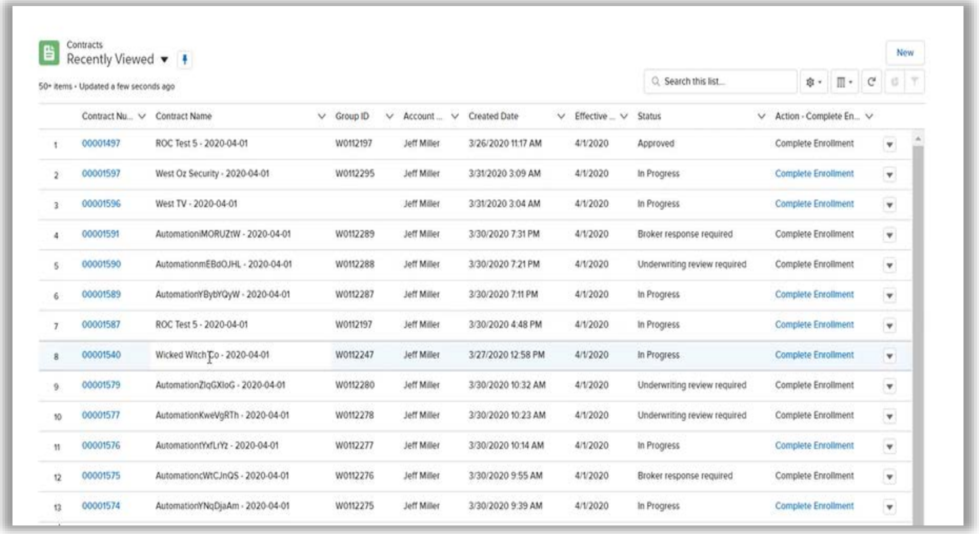
From the home page, click View Enrollments. The contracts page will display

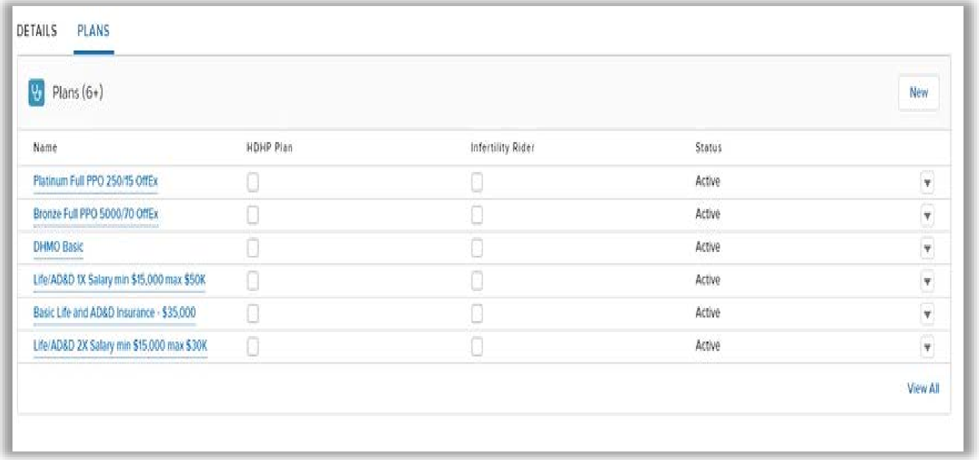
- Filter enrollments by contract number, name, group ID, account, created date, effective date, status, or actions.
- Use the Search box at the top of the screen to search by group name.

For enrollments not completed, click Complete Enrollment to continue the enrollment from where the user last saved

Once the desired enrollment is located:

- Click the contract number to display the contract page.
- On this page, the group's information, status of the group, effective date, group contribution, group waiting period, employee information, eligibility information, and other group coverage information are visible.
- The Plans tab to view the group's plans along with any selected riders.
- The contract status is displayed.
- Submitted - the enrollment has been transferred to Blue Shield for review by Welcome Center of Excellence.
- Enrolled - the enrollment has been loaded into Facets.

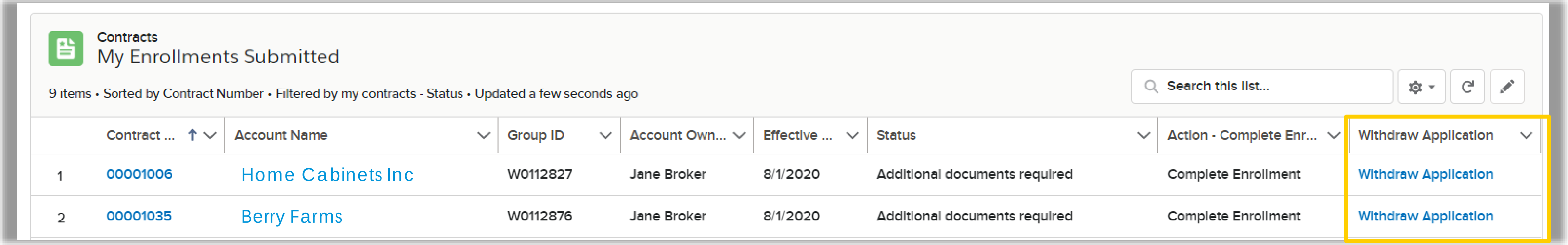




Withdrawing groups

Withdraw any submitted application using the following steps:

1. Navigate to View Enrollments
2. Filter to My Enrollments Submitted
3. Click on "withdraw' in the right table column



Email notifications

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

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

Pend and underwriting related emails will use a new address.
WCOEPendResponse@BlueShieldCA.Com

Do not reply to emails with document attachments.

Use the Leave a Comment feature on the document upload page to share relevant information to the Welcome Center of Excellence team.

Action Required	Informational
Pend for additional information - log into the tool and upload requested documents	Pend resolution/ decision - Approval and declination notices
Additional information reminder - 5 days after the pend email, we will send automated emails to remind you to provide requested information	Application expiration - Incomplete applications expire after 30 days
Installation complete - Log into the tool to download your enrolled member census complete with member IDs	Task assignment - Automated system tasks. Can be ignored
PDF document for download - Log into the tool to download quotes and enrolled member census	DocuSign signature status - Resend or edit application signatories

Connect with your Regional Sales Executive to set up broker office training on the Employer Enrollment Tool.

Look up [your regional Sales team]

877.888.6031

We've moved our in-office visits online. [Join a webinar] to learn about various regional and statewide topics.