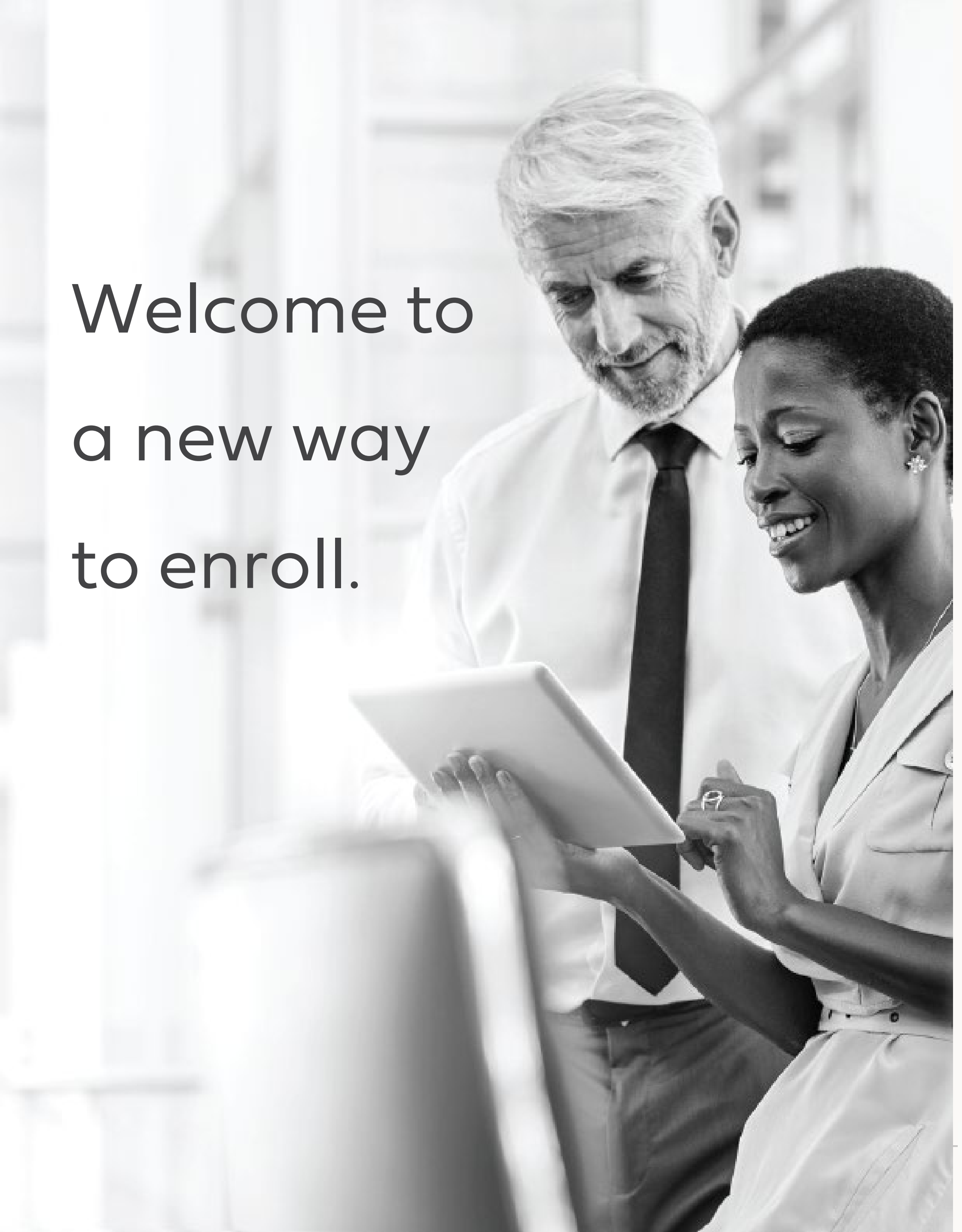
Employer Enrollment Tool Consolidated tool guide for brokers

Last updated March 2025



Welcome to a new way to enroll.

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 end-to-end digital capabilities in the Employer Enrollment Tool.

Table of contents

Make enrollment changes with confidence with the Employer Enrollment Tool

Real-time installation

Provider and other downstream systems will update in their normal SLA

Visibility to your data

Group and member account pages make it easy to view information

Smart capabilities

Field level validations help you avoid typos and simple mistakes

Simple submissions

Guided workflows direct you through each step of the process

Experience easy enrollments yourself

Expected installation of new hire enrollment

3 minutes

Features available in one tool

56 *

* Large Group employers will have fewer features

Tool submissions with self-service status tracking

100%

Tool Features

Feature Category	Feature	Segment
Quoting	Generate a quote	SBM
	View and download quote documents	SBM
New Business Enrollment	Enroll a new Small Group and Members	SBM
	App Status tracking tool	SBM
Payment	Submit initial payment	SBM
	Setup autopayment during enrollment	SBM
	Group Payment Status	SBM, LG, P
Pend/ exception management	Request pend documents during submission	SBM, LG, P
	Upload pend documents	SBM, LG, P
Member Roster	View Member Roster	SBM, LG, P
	Download Member Roster	SBM, LG, P
Group Plan Selections	Add a product	SBM
	Cancel a product	SBM
	Add a Plan	SBM
	Cancel a Plan	SBM
Group Contact	Add/Update/Cancel Contacts	SBM, LG, P
	Add/Update/Cancel TPA	SBM, LG, P
	Add/Update/Cancel ABHP Contact	SBM, LG, P
Eligibility Options	Update COBRA/Cal-COBRA status	SBM
	Update Waiting Period	SBM
	Update Part Time Coverage	SBM
Group Details	Update Demographic Information	SBM, LG, P
	Update Billing Address	SBM, LG, P
Group Class Offerings	Add a Class plan	SBM
Employer Contribution	Update Employer Contribution	SBM
Group Structure Change	Update Group Name	SBM
	Update SIC	SBM
	Update Tax ID	SBM
	Update Entity Type	SBM
	Update Employee FT/FTE Counts	SBM
	Add Subsidiaries	SBM
Manage Billing Attributes	Modify Billing Information	SBM
Bulk Transactions	Bulk Cancelations of Members	SBM, LG, P
	Bulk Member Plan Updates	SBM
	Bulk new member enrollment	SBM

Feature Category	Feature	Segment
Enroll Employee	Enroll a Subscriber and Family	SBM, LG, P
Cancel Subscriber	Cancel a Subscriber and Family	SBM, LG, P
Cancel Dependents	Cancel a Dependent	SBM, LG, P
Add Dependent	Enroll a Dependent	SBM, LG, P
ID Cards	Request ID card via email or mail	SBM, LG, P
	Download ID Card	SBM, LG, P
Member Plan Modifications	Add a product	SBM, LG, P
	Cancel a product	SBM, LG, P
	Add a plan	SBM, LG, P
	Change a plan	SBM, LG, P
	Cancel a plan	SBM, LG, P
Member Information Updates	Update Member Name	SBM, LG, P
	Update Member Date of birth	SBM, LG, P
	Update Member Gender/Gender Identity	SBM, LG, P
	Update Subscriber Status	SBM, LG, P
	Update Member Marital Status	SBM, LG, P
	Update / correct SSN	SBM, LG, P
	Update Subscriber Date of hire	SBM, LG, P
	Update Salary Information	SBM, LG, P
Member Contact and Classification	Update Address	SBM, LG, P
	Update Phone	SBM, LG, P
	Update Email	SBM, LG, P
	Update Language preference	SBM, LG, P
	Update Class	SBM, LG, P
	Update Subgroup	SBM, LG, P
	Add/Update/Remove Department Code	SBM, LG, P
Reinstate Subscriber	Reinstate a Subscriber	SBM, LG, P
Reinstate Dependent	Reinstate a Dependent	SBM, LG, P
COBRA Enrollment	Enroll a COBRA subscriber and/or family	SBM, LG, P
Cancel Group	Cancel a group	SBM, LG, P
Renewals	Group Level Renewal Changes for Small Group	SBM
	Member Level Open Enrollment Changes for Small Group	SBM
	Show Group and Member Premium	SBM
	Allow Single Sign on to Shield Renewals Site	SBM

Enrollments not supported digitally

While most enrollments can be processed online through EET, there are a few scenarios that still require an application.

- Reinstate a group
- Anniversary date change
- Add or edit dual waiting period
- Add or edit subgroup
- Enroll court-ordered dependent
- Edit canceled subscriber information (address, demographics) after the reinstatement period ends
- Submit Over-age dependent exception forms

Employer Enrollment Tool tutorial videos

SBM new group enrollment

- Start a quote
- View quotes
- Start an enrollment
- View enrollments
- Upload documents
- SG App Status

SBM renewal

- Renewal navigation
- Start Renewal submission
- Start Open Enrollment submission
- Renewal quoting

SBM, LG & Premier group and member maintenance

- Broker homepage navigation
- Employer homepage navigation
- Group account navigation
- Member account navigation
- Employee Enrollment
- Add dependents
- Order member ID cards
- Cancel employee
- Member demographics
- Member contact and class
- Add/ edit member plans
- Cancel member plans
- Existing member COBRA enrollment
- Group address
- Cancel group
- Class plans *SG only
- Add products/ plans *SG only
- Cancel products/ plans *SG only
- Group name and structure change *SG only
- Bill by department code *SG only

Tool tips

General system tips

1. Use Google Chrome or Microsoft Edge browsers
2. Access to edit group and member information is determined by profile roles set on the portal
3. Use the search bar or Manage all Groups action button to access a group record
4. Enter required fields indicated by a red asterisk
5. Enter the name of the person processing the submission for the digital signature
6. Click View all on the To-Do list to see the full list of open tasks or complete a pend document upload
7. Duplicate submission records will be captured if changes are submitted via the tool and paper/PDF. Only one submission will process completely with the

Eligibility tips

1. Enroll and manage coverage for both group and member enrollment information
2. Open enrollment enrollments are supported
3. Enrollments outside of open enrollment are also supported
4. Waiting periods will be automatically applied at the time of submission
5. Qualifying/ life event in the tool and the tool will offer SEP updates
6. Existing Blue Shield groups do not need to include members refusing coverage

Common troubleshooting tips

1. 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.
2. Part time coverage needs to be setup at the group level contract before enrolling part time employees.
3. 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.
4. Newborn dependents will not display in the tool until they are enrolled as a dependent. Newborns are covered under the subscriber’s plan with access to coverage for the first 31 days but still need to be enrolled as a dependent.

Download the EET FAQ for more tips

SBM renewal eligibility

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 not 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

Renewals 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

LG maintenance eligibility

Electric Data Interchanges and the Employer Enrollment Tool can be used together.

We recommend using the enrollment tool while your EDI connection is being set up, or for access to care enrollments.

The EDI file is the source of truth and will overwrite changes only made to the Employer Enrollment Tool, and we will not allow open enrollment changes in the enrollment tool if you also use an EDI file.

Using EDI and the EET together

All changes made in EET must be made to the file before it is next sent to Blue Shield

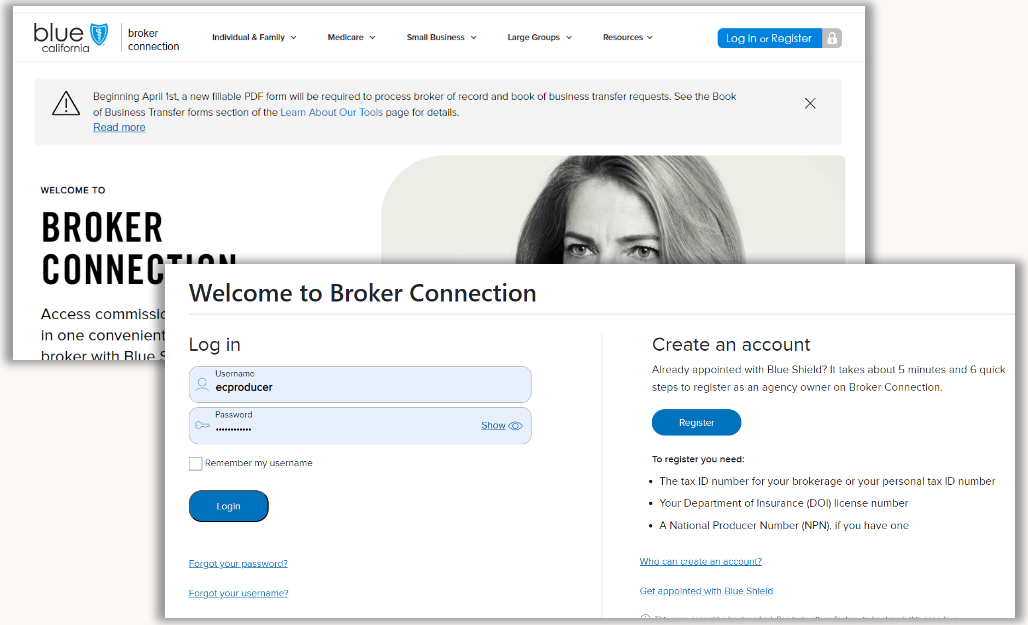
Open Enrollment changes are not supported in EET. These must be done through the file

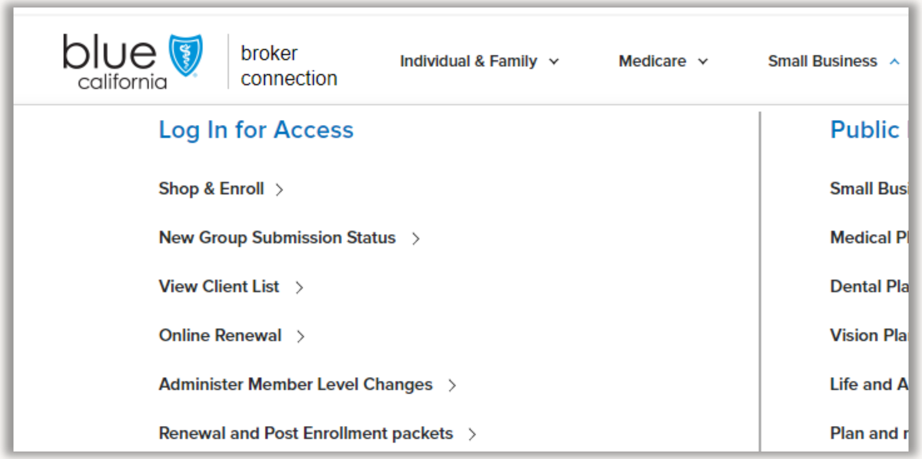
Additional acknowledgements and reminders will be provided in EET when a group has an EDI file

Navigate to the tool

The Employer Enrollment Tool is one of many digital tools available to you in Broker Connection.

- Log into your Broker Connection account to access the Employer Enrollment Tool
- We recommend that agencies create accounts for each individual, but shared accounts are allowed
- If you have setup multiple agency Tax IDs or sub IDs, be mindful to log into the account that corresponds to that ID number to view and manage groups sold under that ID
- Access links under the Small Business and Large Group navigation will route you to the same homepage in EET



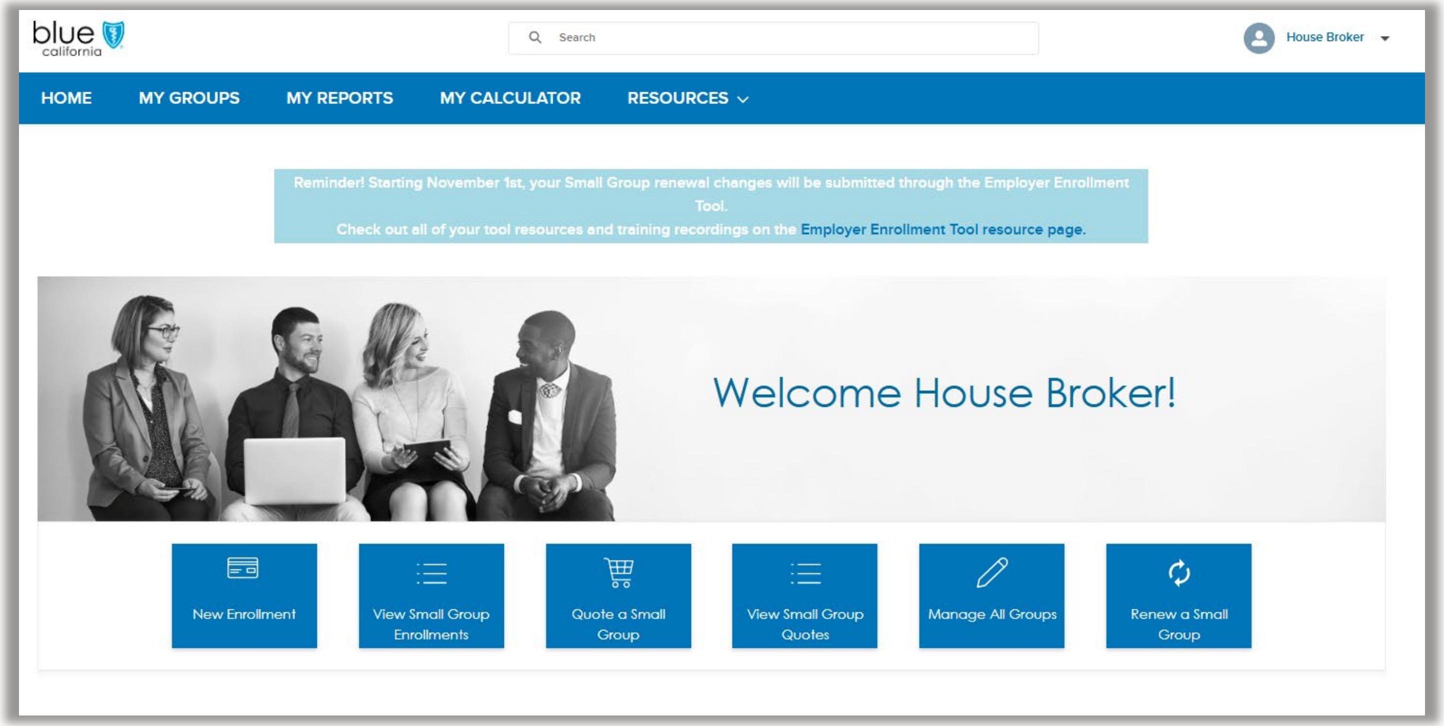


Homepage

Along the top

Use the top navigation to find helpful information

- Search records you have permission to view, including quotes and enrollments
- Home returns you to the homepage from anywhere in the tool
- My Groups opens a list of your book of business
- My Reports houses your enrollment reports
- My Calculator let's you calculate effective dates before you begin an enrollment
- Resources links to User Guide, Tips and Tricks, and a tool resource page with additional information



Quick Actions

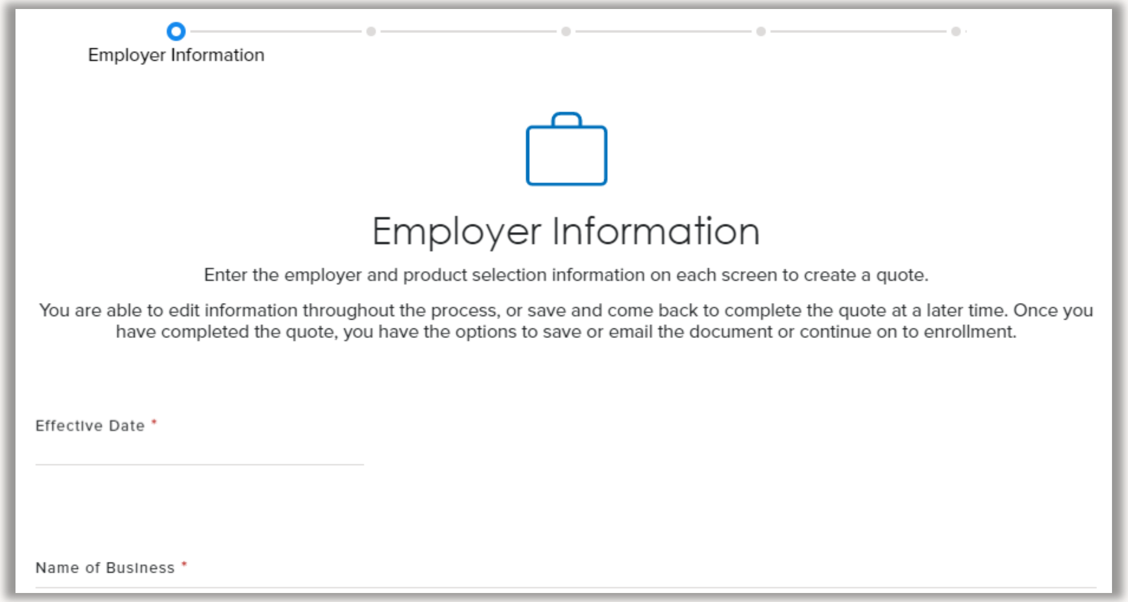
Begin an enrollment submission

- New enrollment – SBM new group applications
- Quote a small group – SBM shop and quote
- Manage all groups – LG, SBM benefits maintenance
- Renew a small group – SBM renewals

Quoting

Quote a Small Group

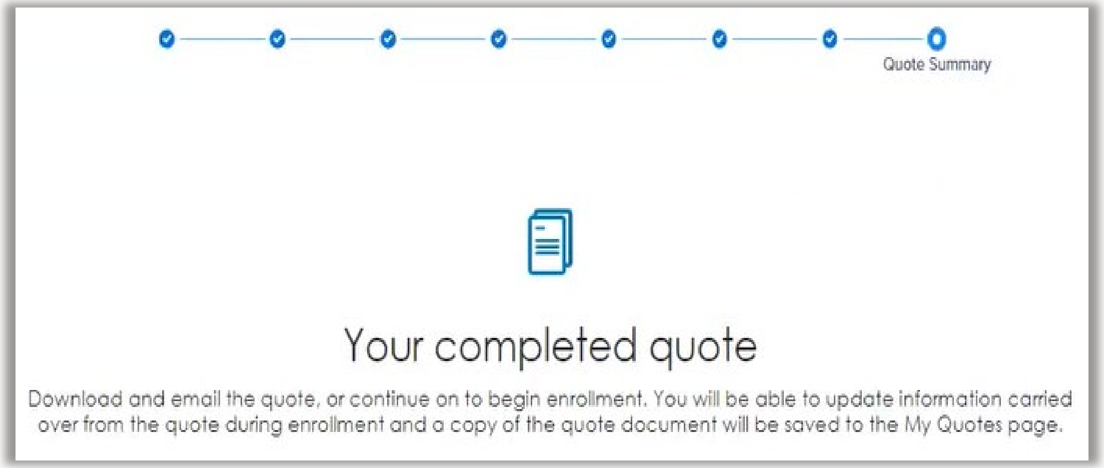
- Quote begins with **Employer Information**
  - Effective date, group name, and number of eligible employees are required fields
  - Tax ID and SIC code are optional fields
- An employee census file can be uploaded or added individually to the **Employer Census** page
  - Users can download a census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



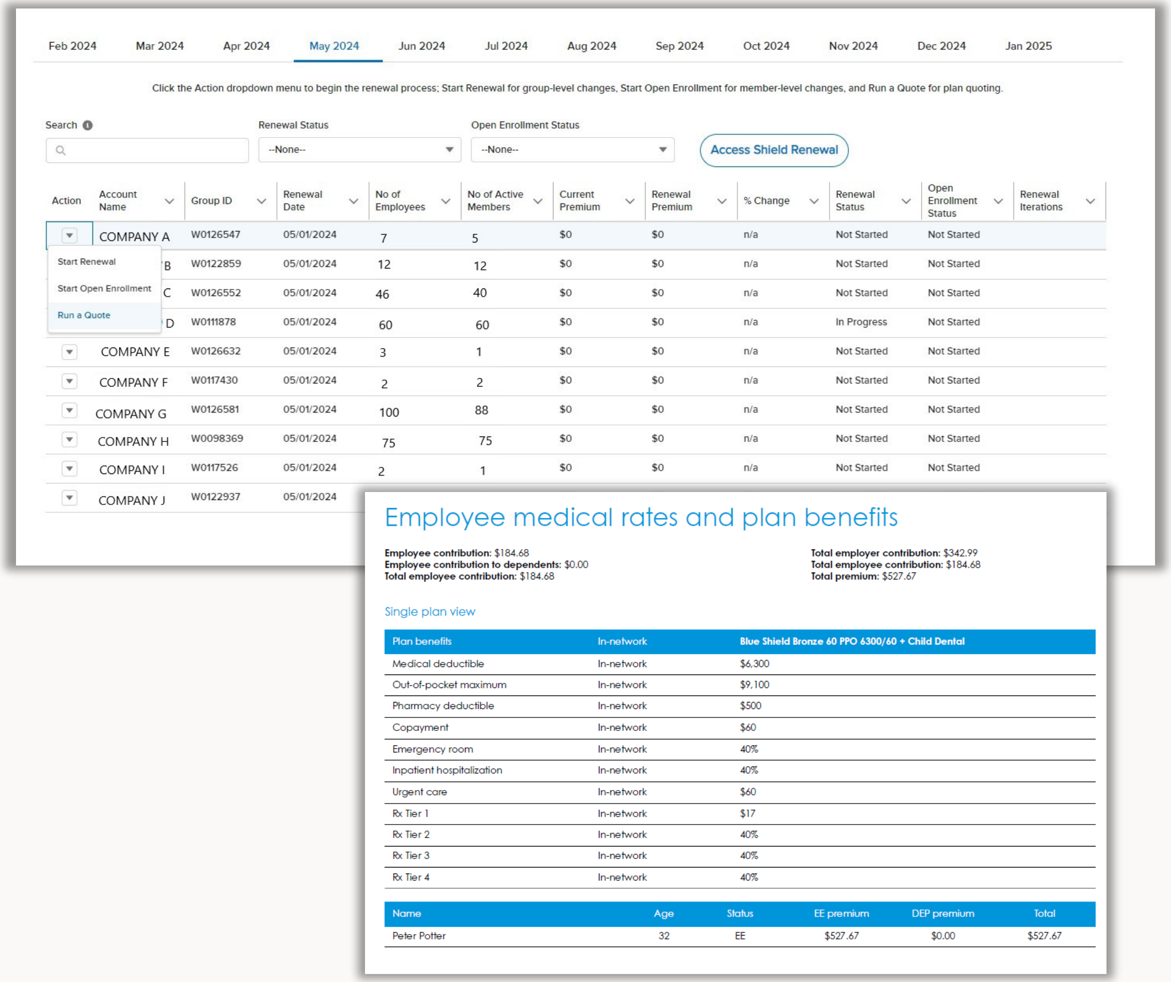
Running a renewal quote

Navigate to renewal quotes

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

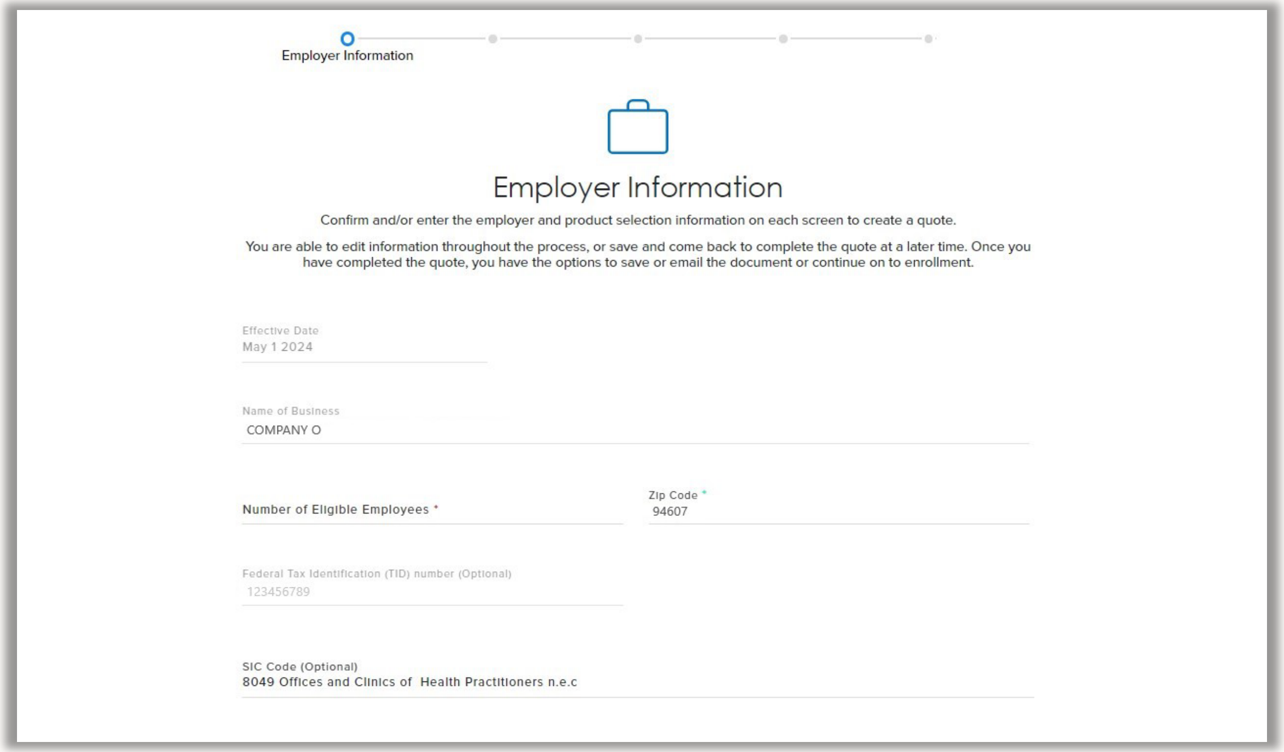
Quote tips

- 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



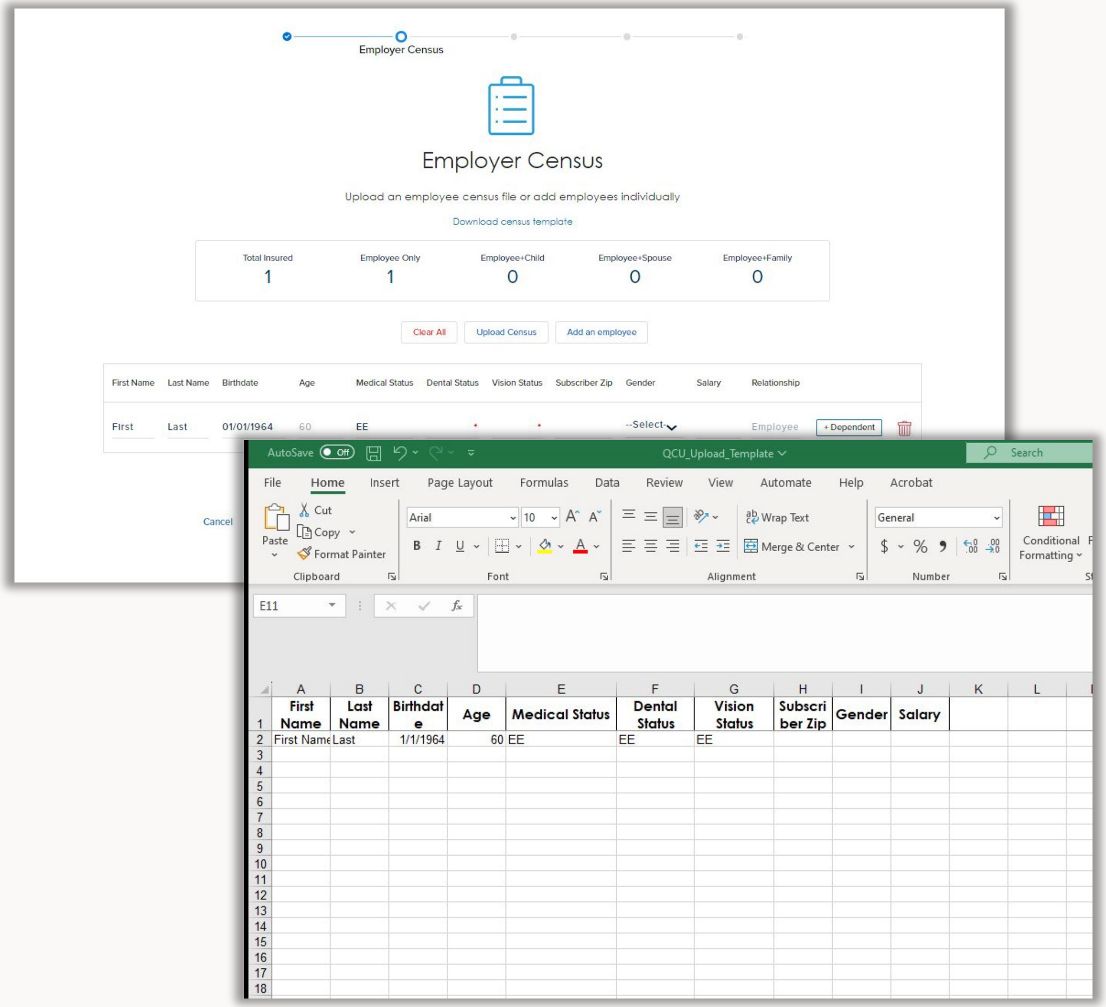
Renewal quote – group information

- 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



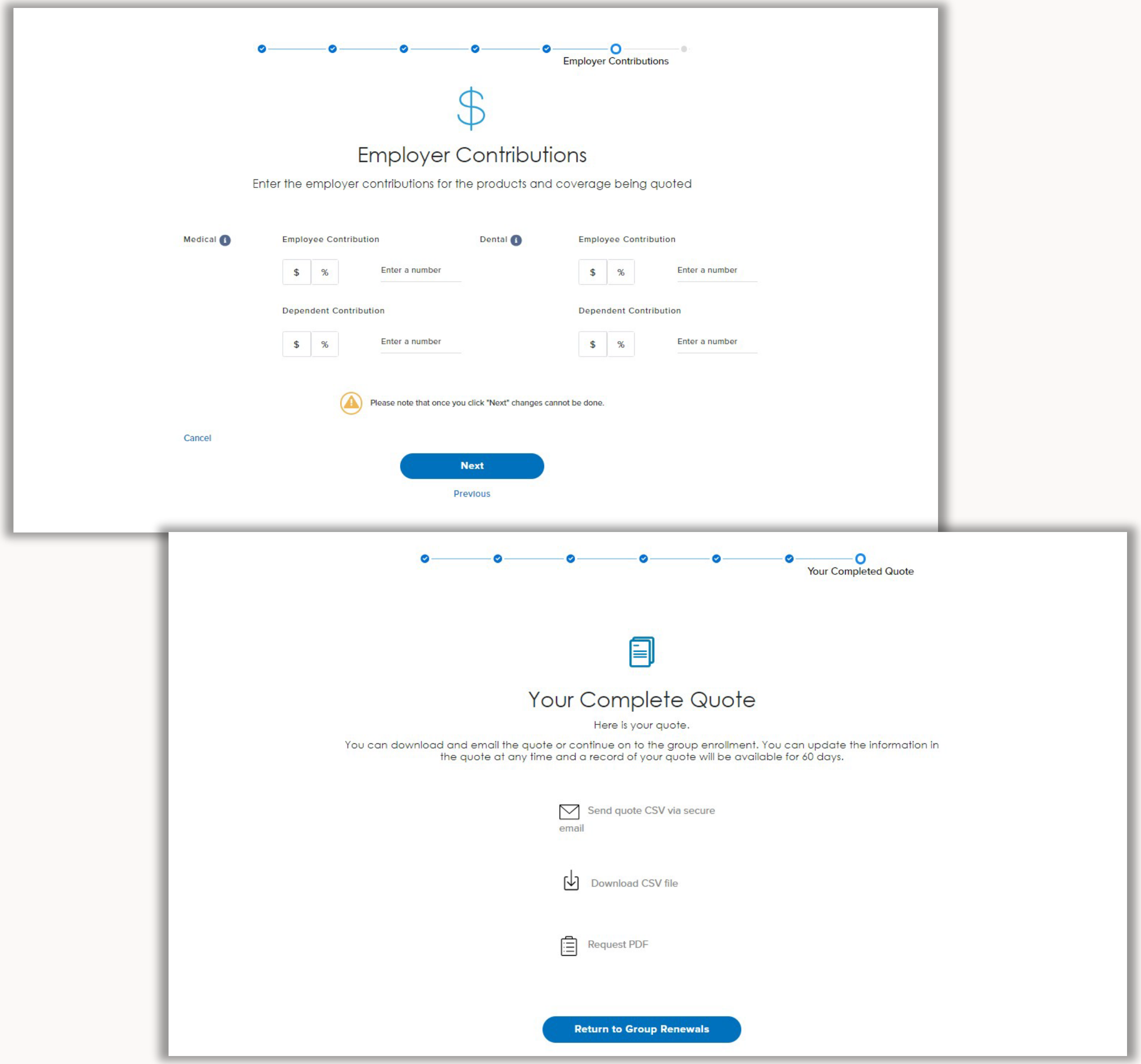
Renewal quote - census

- 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 - finalize your quote

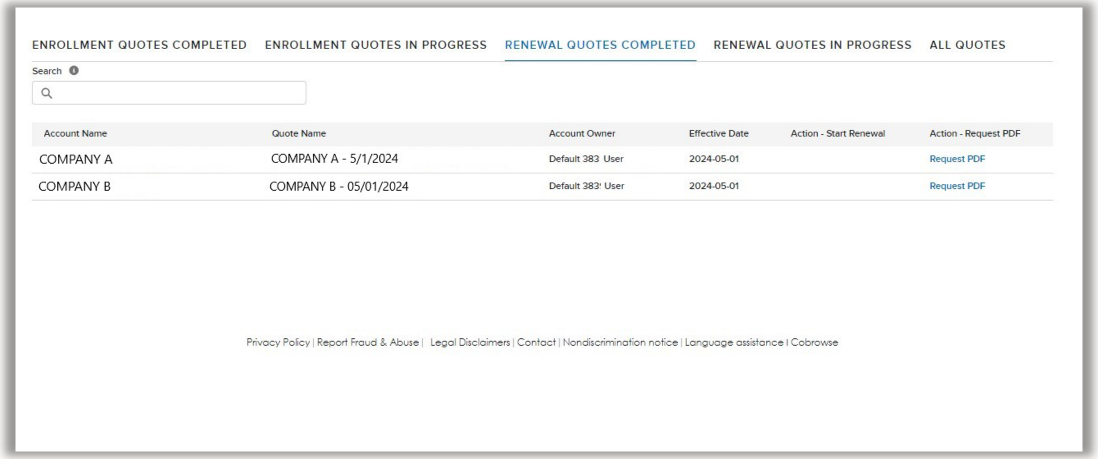
- The Employer Contributions section will cover all products being quoted
  - This section is not required during the quoting phase
- The completed quote can be downloaded, emailed securely, or the user can proceed by clicking Continue to Enrollment
  - CSV downloads and emails are available immediately.
  - 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.

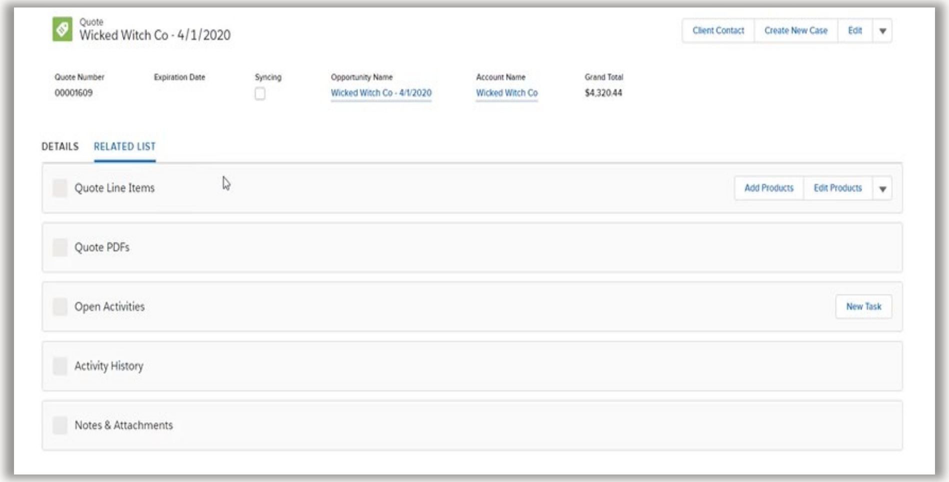


View Quotes

[Watch a tutorial.]

1. From the Employer Enrollment Tool landing page, click on View Quotes
2. Click on the tabs to select the type of quote created
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





Quote Proposal PDF

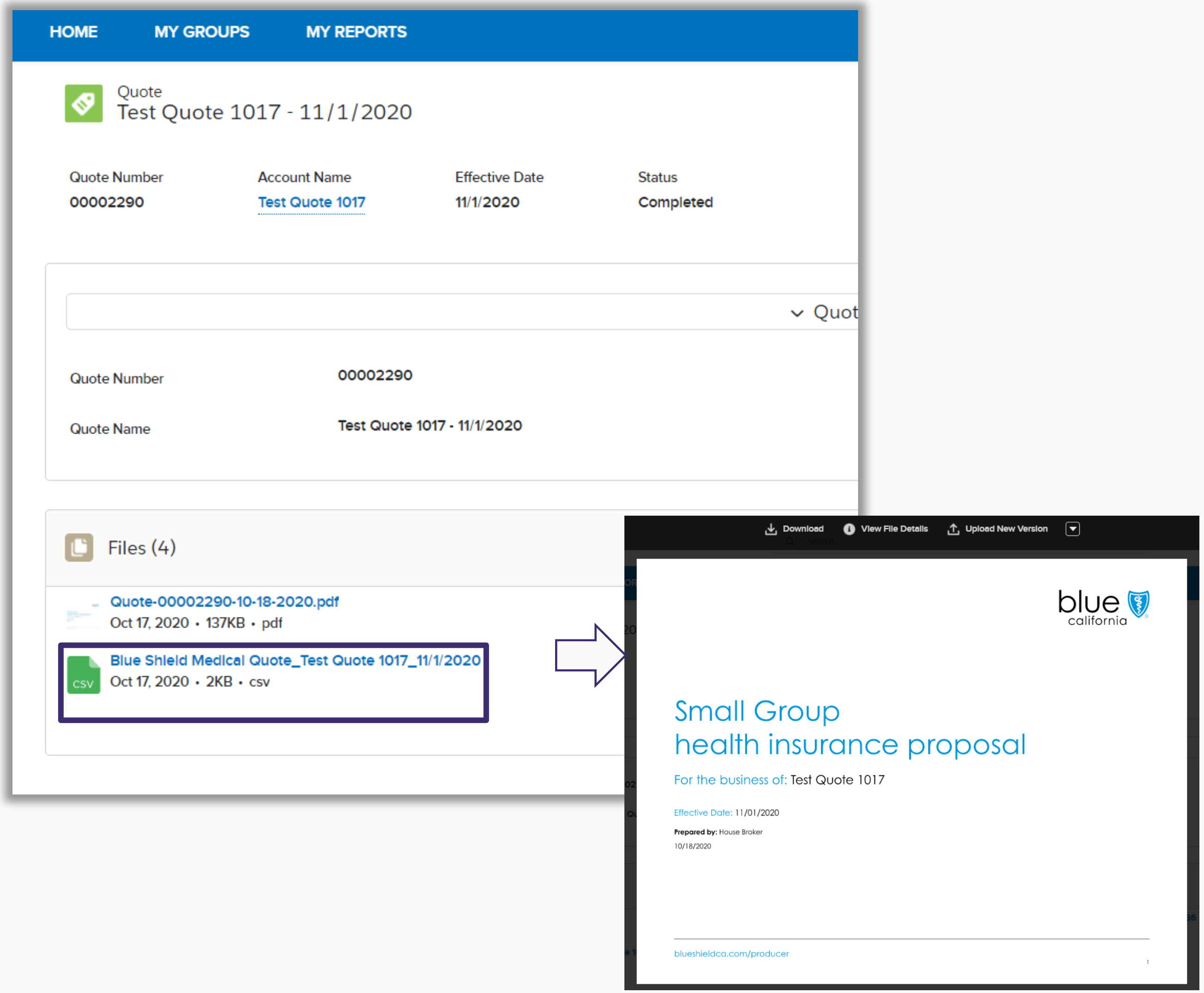
PDF Quote proposals can be requested once the quote is completed.

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.

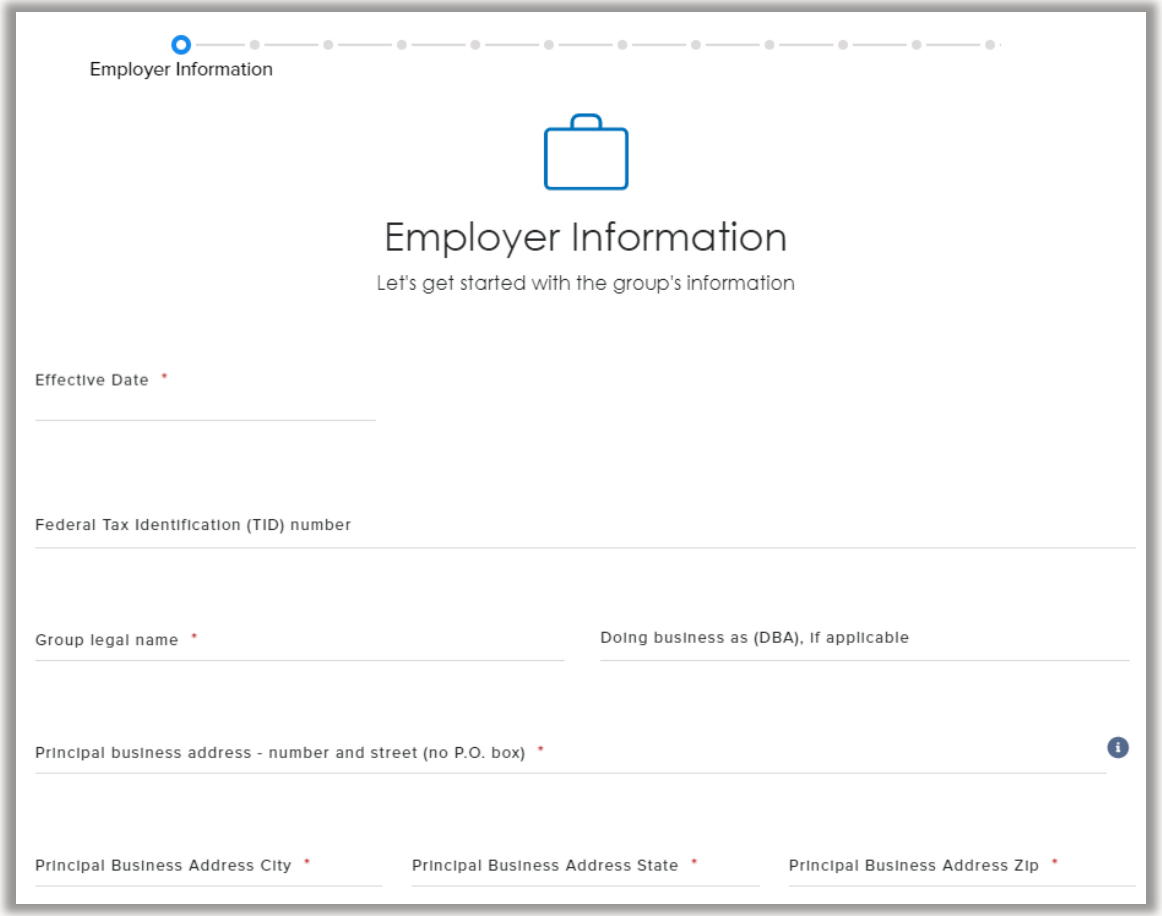
Users can still download the CSV quote file in addition to requesting a PDF.



New group enrollment

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

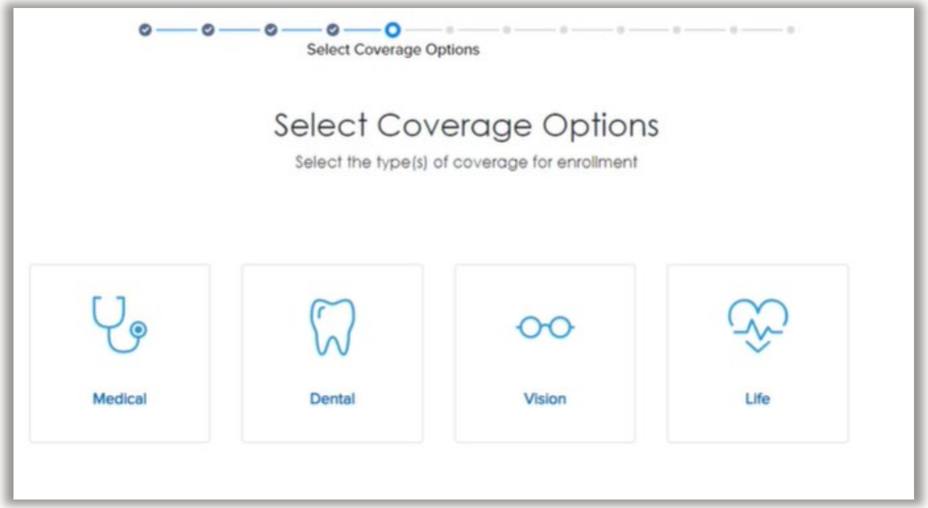


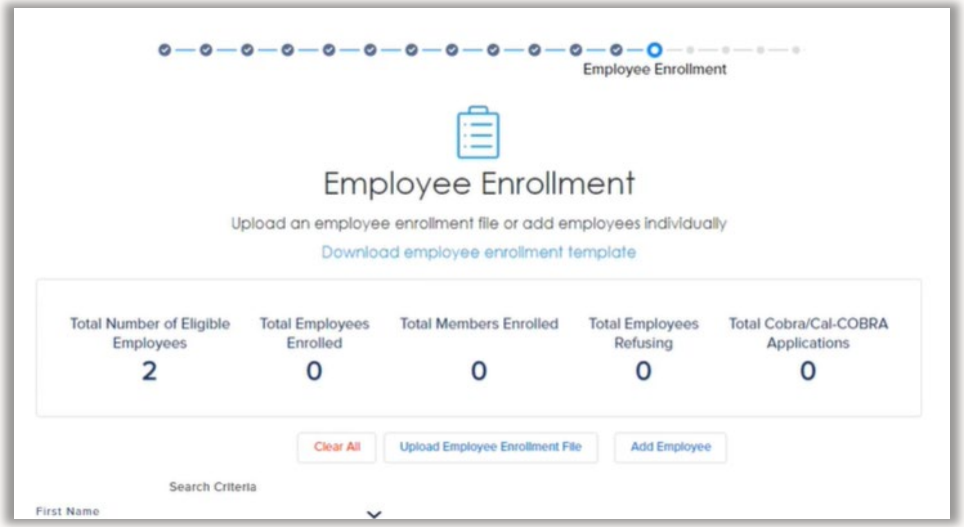
5. Product selections are made on the Select Coverage Options pages

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.

Application information			Subscriber information	
Group Tax ID	Applicant Type	Type of Application	Applicant Last Name *(incl Suffix)*	Applicant First Name

Subscriber
Spouse
Domestic Partner
Dependent Child
Other Dependent Child - Guardianship

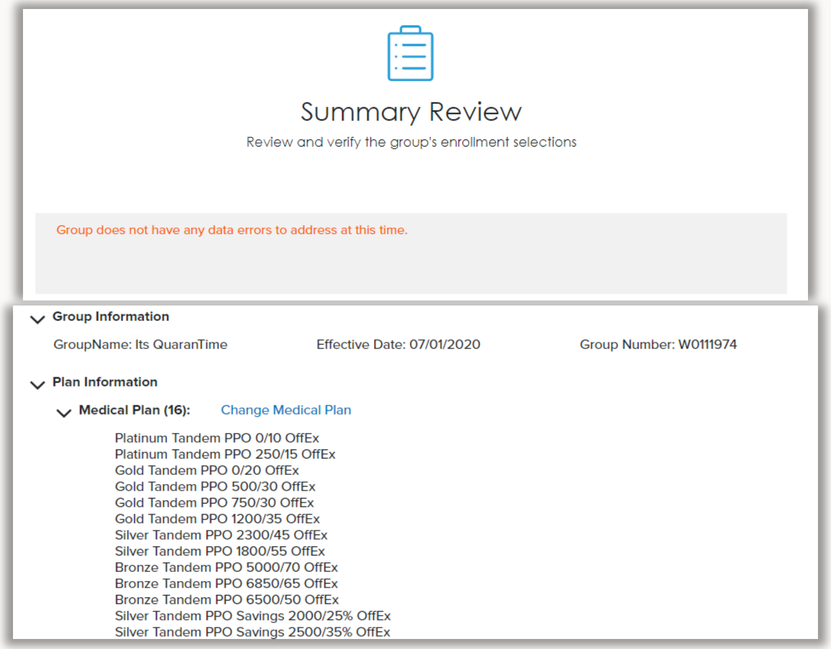
Application information			Subscriber information	
Group Tax ID	Applicant Type	Type of Application	Applicant Last Name *(incl Suffix)*	Applicant First Name
555444333	Subscriber	Enroll	johnson	bob
555444333	Subscriber	Enroll	thomas	susan
555444333	Subscriber	Enroll	perez	daniel

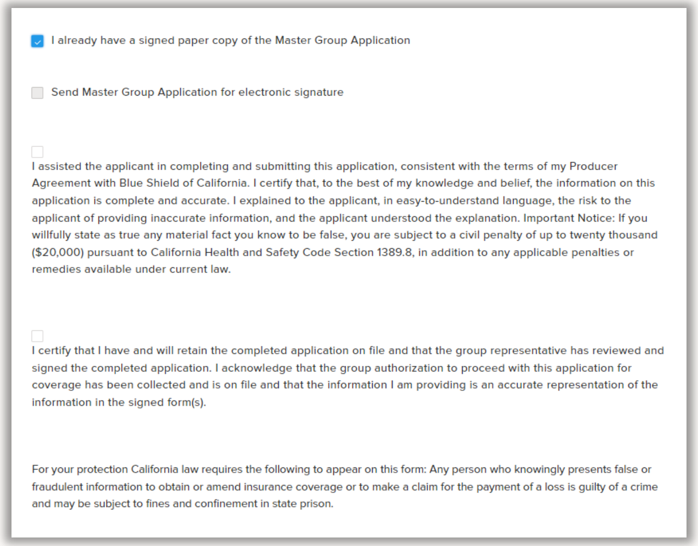
G	H	I	J
Legend:			
	Required		
	Optional		Export to .CSV
	Not Required		
	Incorrect Value		
Version 2020Q4_V1V			

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. Choose one of the two signature process to proceed
1. If you have signed copies of the MGA and EEA's select the option to attest in the tool
    - Check the boxes next to the attestations and provides their name and date before selecting "Submit".

2. If you still need to collect application signatures, use the eSignature option. 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.

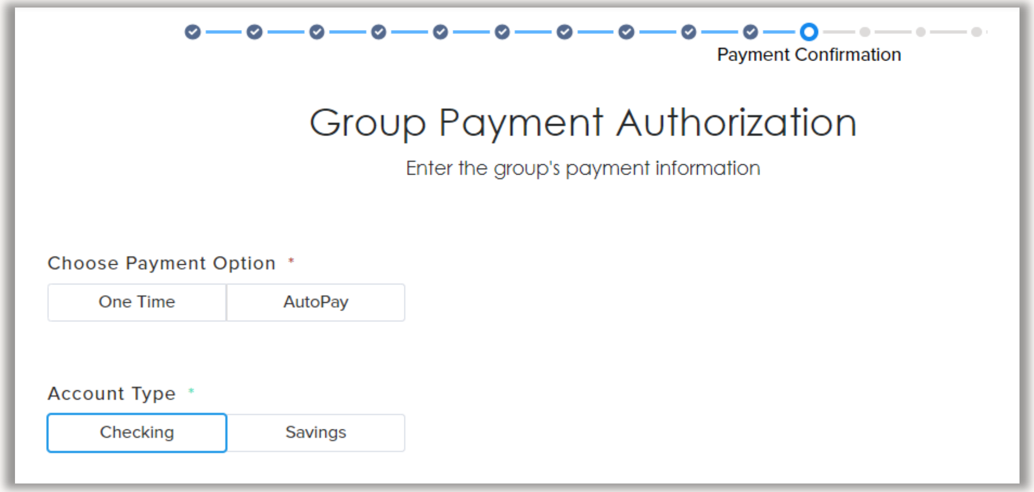


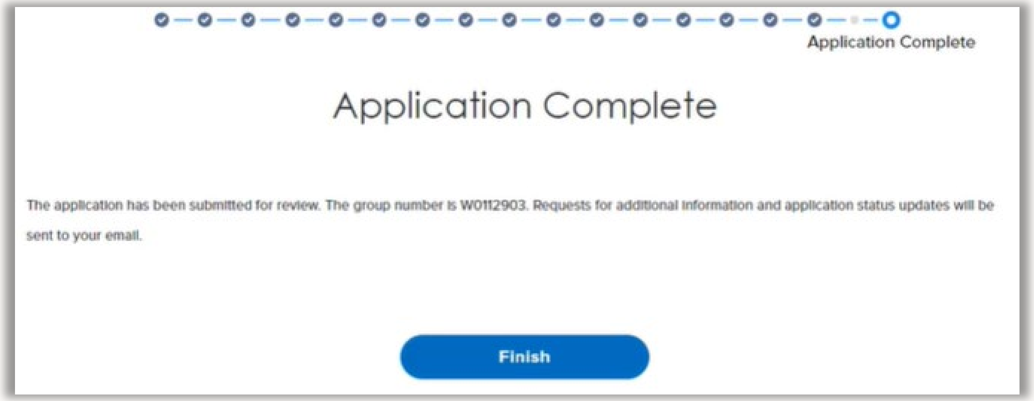


11. Group's Initial Premium Payment page collects information for the ACH payment. This payment will not process until the group has been confirmed in Facets.
    - **New!** Select Autopay to use the entered ACH information for future monthly payments

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.





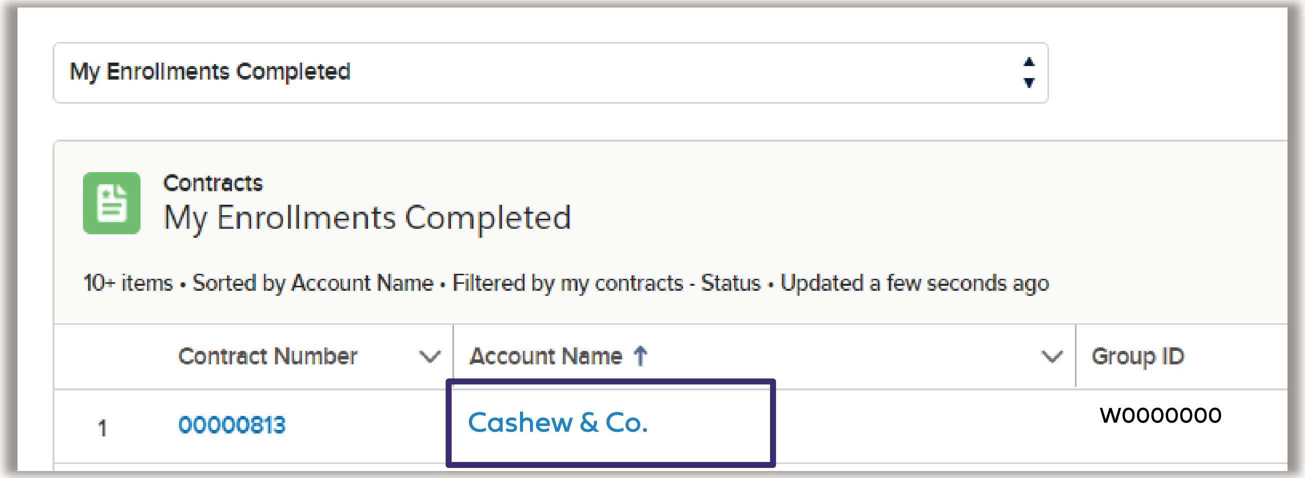
Enrollment Proposal CSV

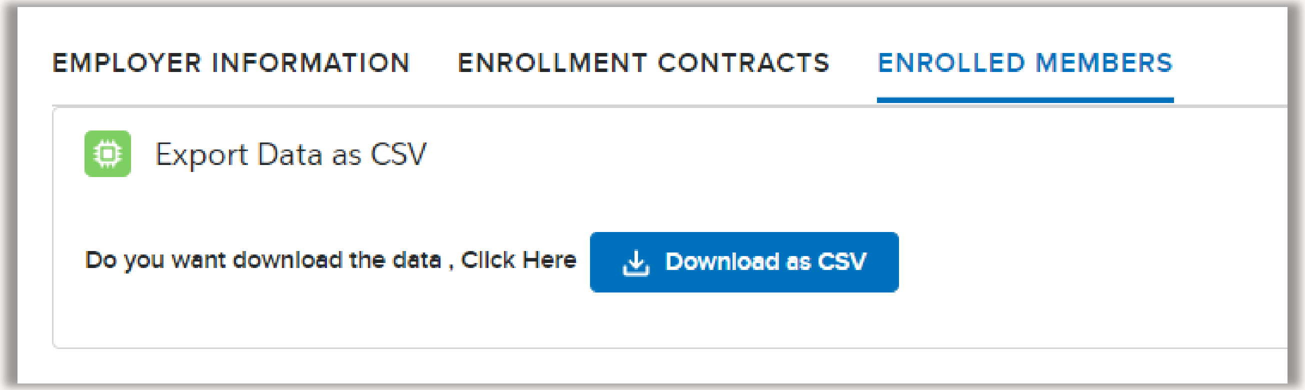
Member ID numbers can be self-serviced within the tool through the Enrollment census CSV file.

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 Enrollments

[Watch a tutorial.]

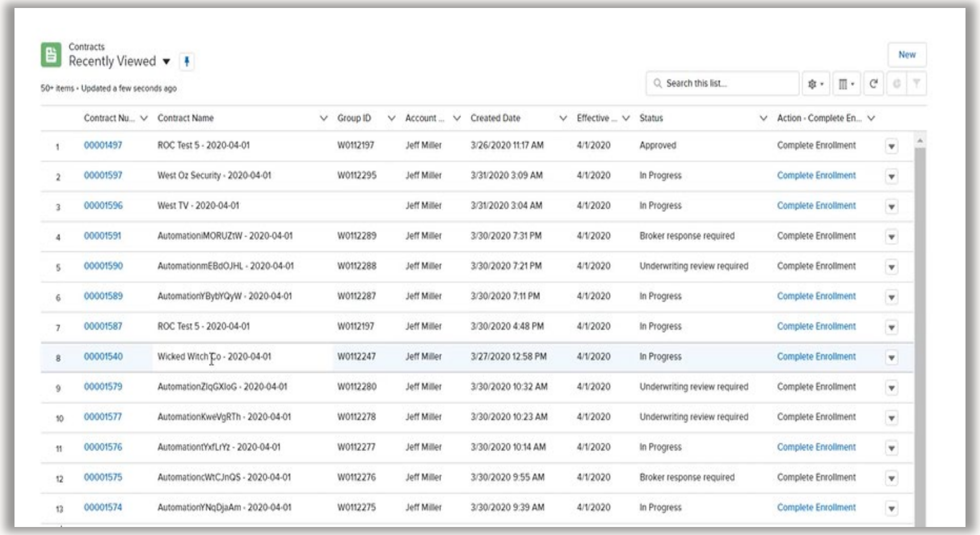
From the home page, click View Enrollments. The contracts page will display

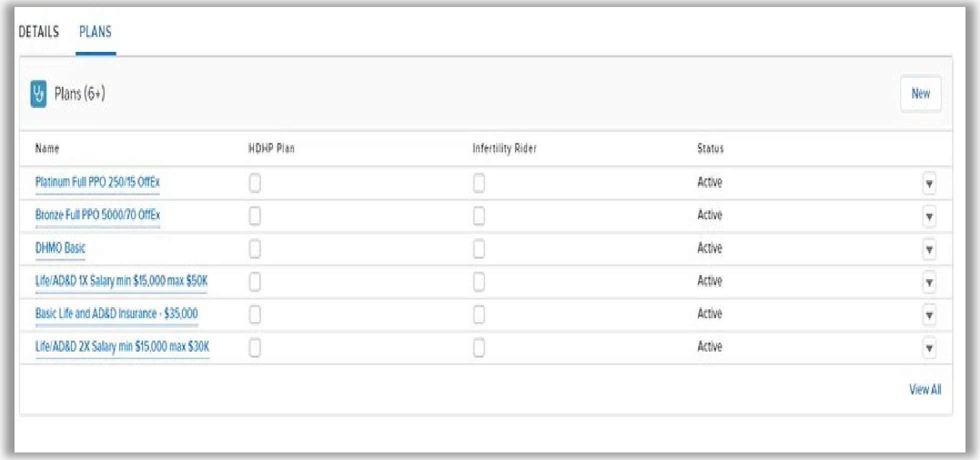
- Filter enrollments by contract number, name, group ID, account, created date, effective date, status, or actions.
- Use the Search box at the top of the screen to search by group name.

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.

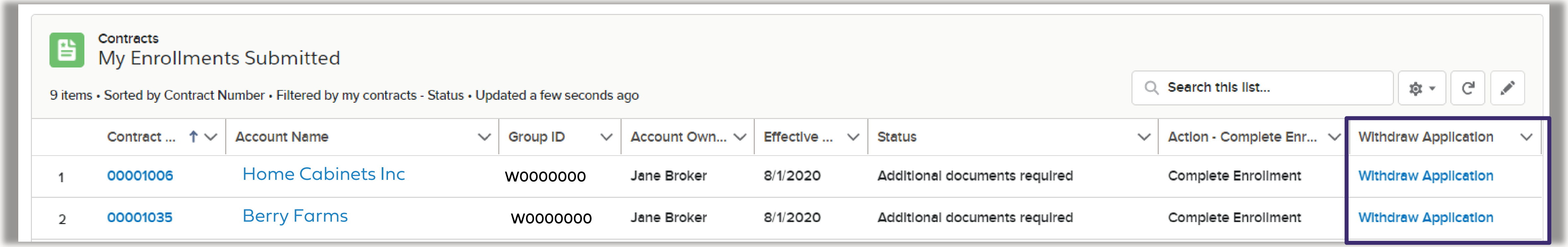




Withdrawing groups

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



Contracts
My Enrollments Submitted

9 items • Sorted by Contract Number • Filtered by my contracts - Status • Updated a few seconds ago

Search this list...

	Contract ...	Account Name	Group ID	Account Own...	Effective ...	Status	Action - Complete Enr...	Withdraw Application
1	00001006	Home Cabinets Inc	W0000000	Jane Broker	8/1/2020	Additional documents required	Complete Enrollment	Withdraw Application
2	00001035	Berry Farms	W0000000	Jane Broker	8/1/2020	Additional documents required	Complete Enrollment	Withdraw Application

Benefits Management

Group account

To begin a maintenance record change, select your company. Click on the blue account name to open the account record page.

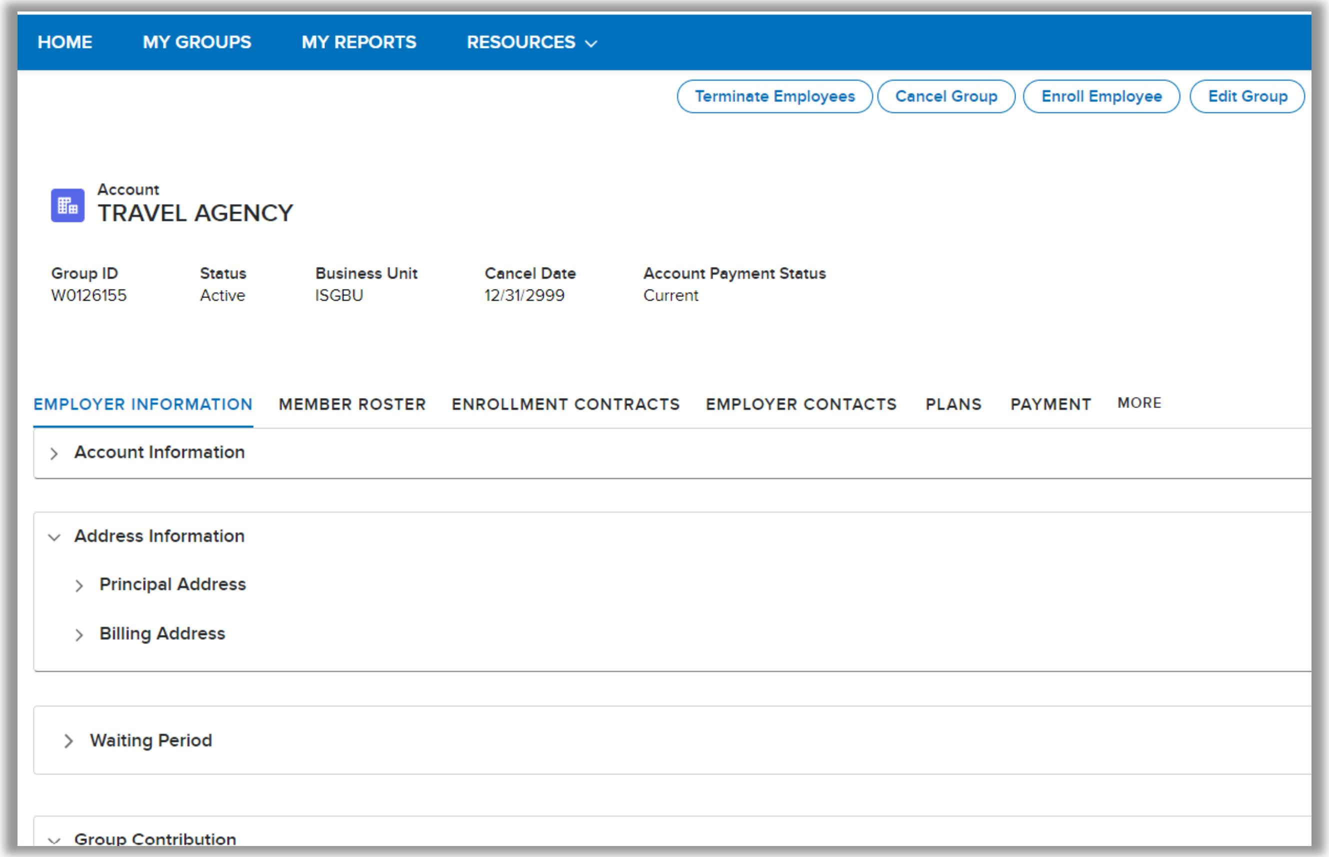
The account record page displays information regarding to your company.

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

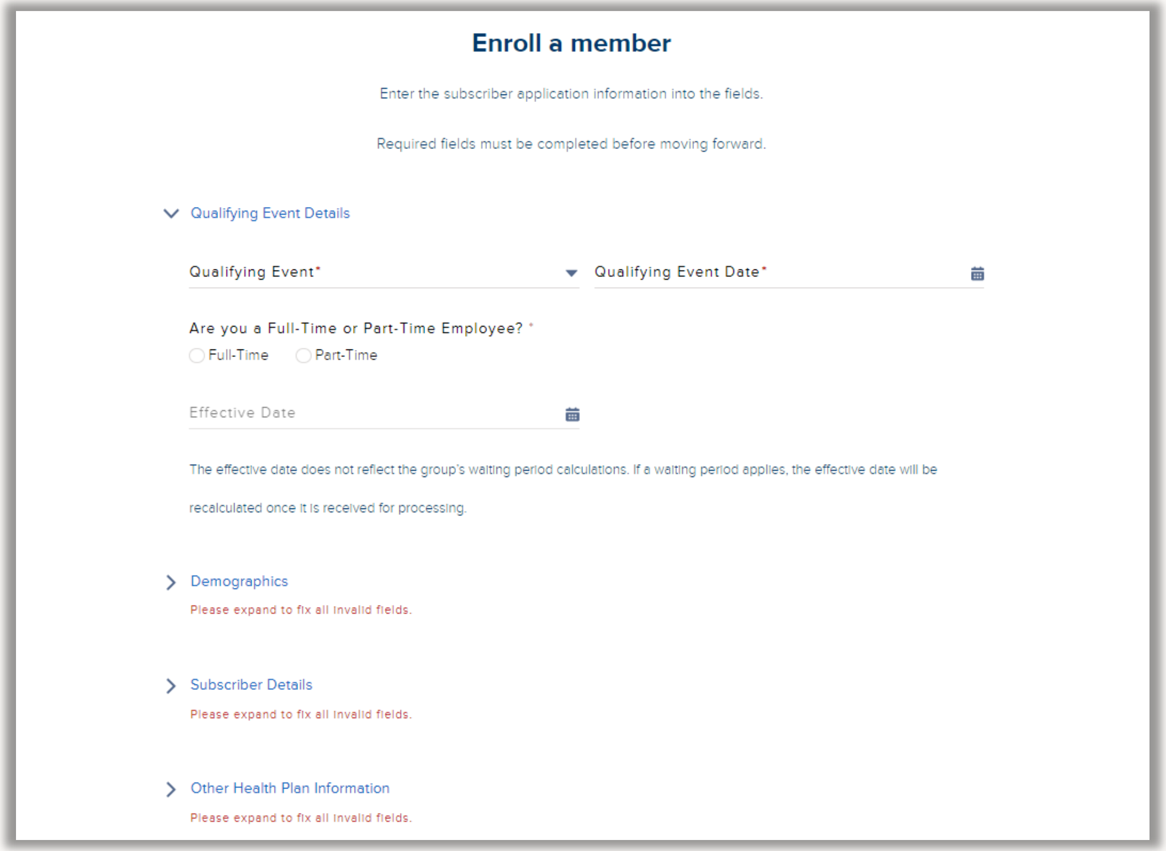
Enroll Employee button opens an enrollment application flow that will guide the user through the enrollment process.
Edit Group button opens a screen of cards each a different type of record change. Click on a card to include it in the transaction. Click on multiple cards at one time to submit many different record change types in one transaction.



Enroll employees

Use for - Enrolling new employees and their dependents

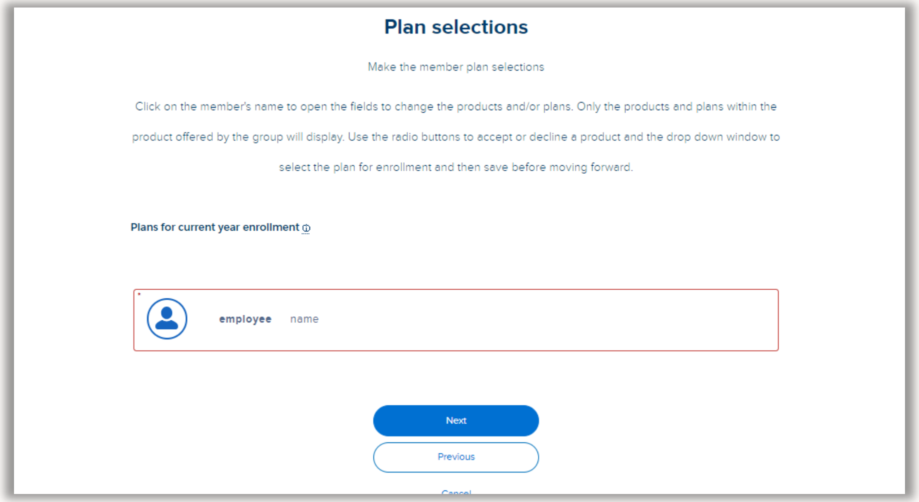
How - This transaction has a two-screen workflow. First, enter in the enrolling employee's information. This is the same information captured on the Employee Enrollment Application (EEA) form.

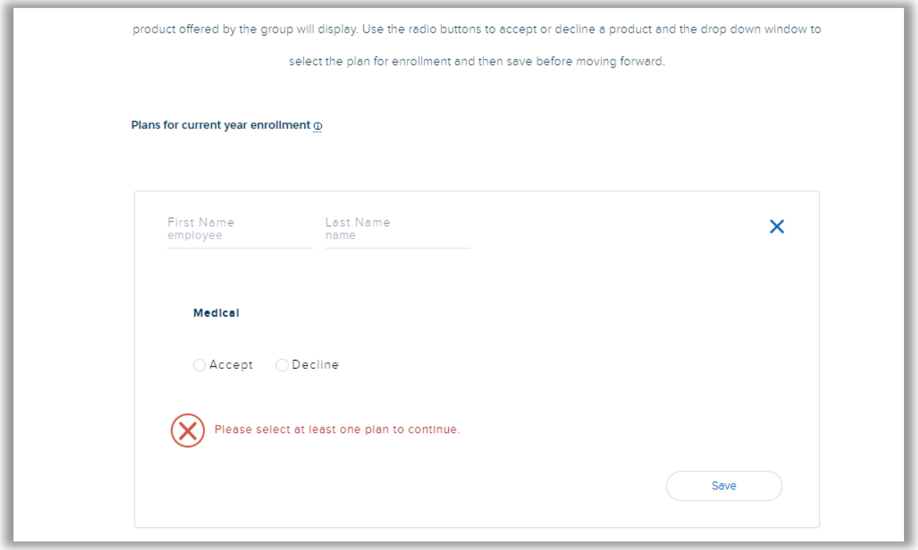


Enroll employees continued

Next, select the plan election for the member(s). Click on the boxes to open the product and plan fields.

Use the toggle buttons to accept or decline the products offered by your company. Then use the dropdown menu to select the member's plan from the available plans offered. Click the Save button before moving on.

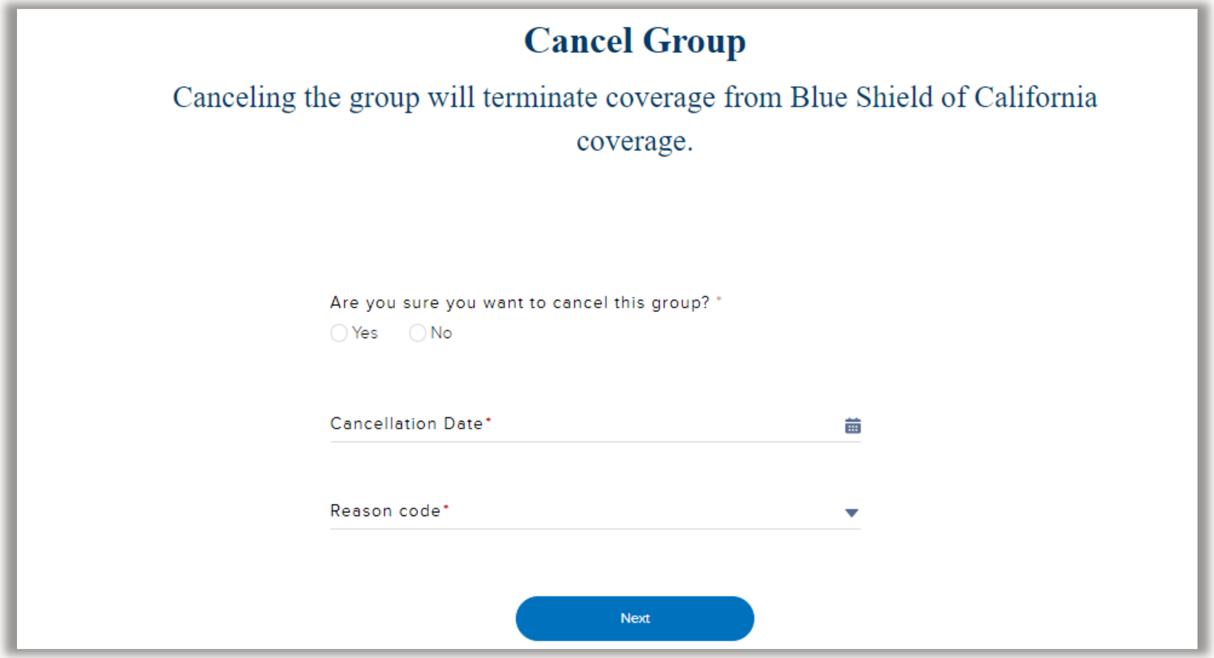




Group cancelation

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

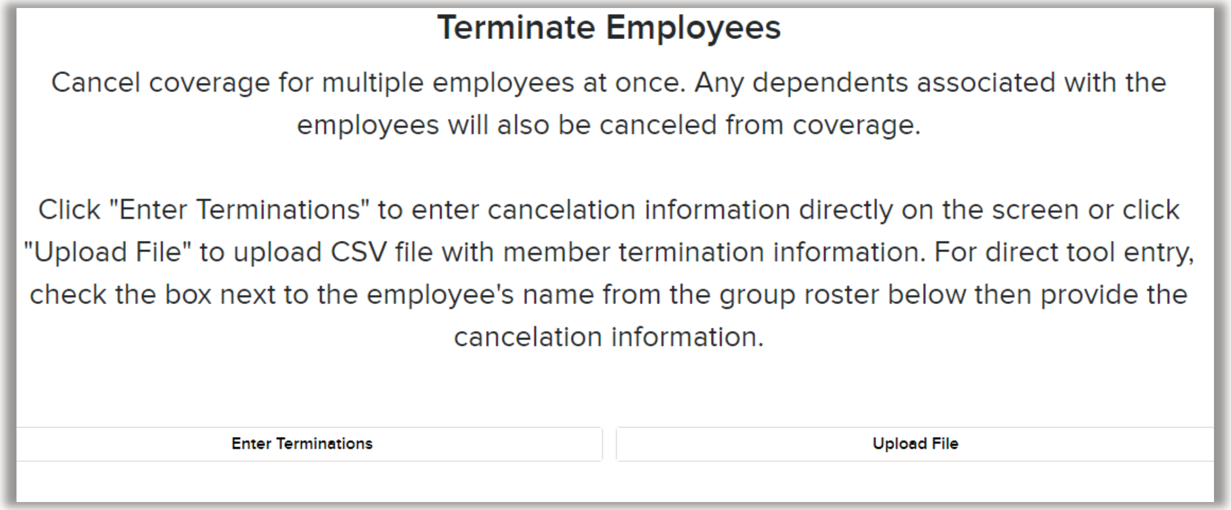
How - Confirm the intention to cancel coverage. Then provide the cancelation date and reason so ended your Blue Shield coverage.



Bulk member cancelation

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

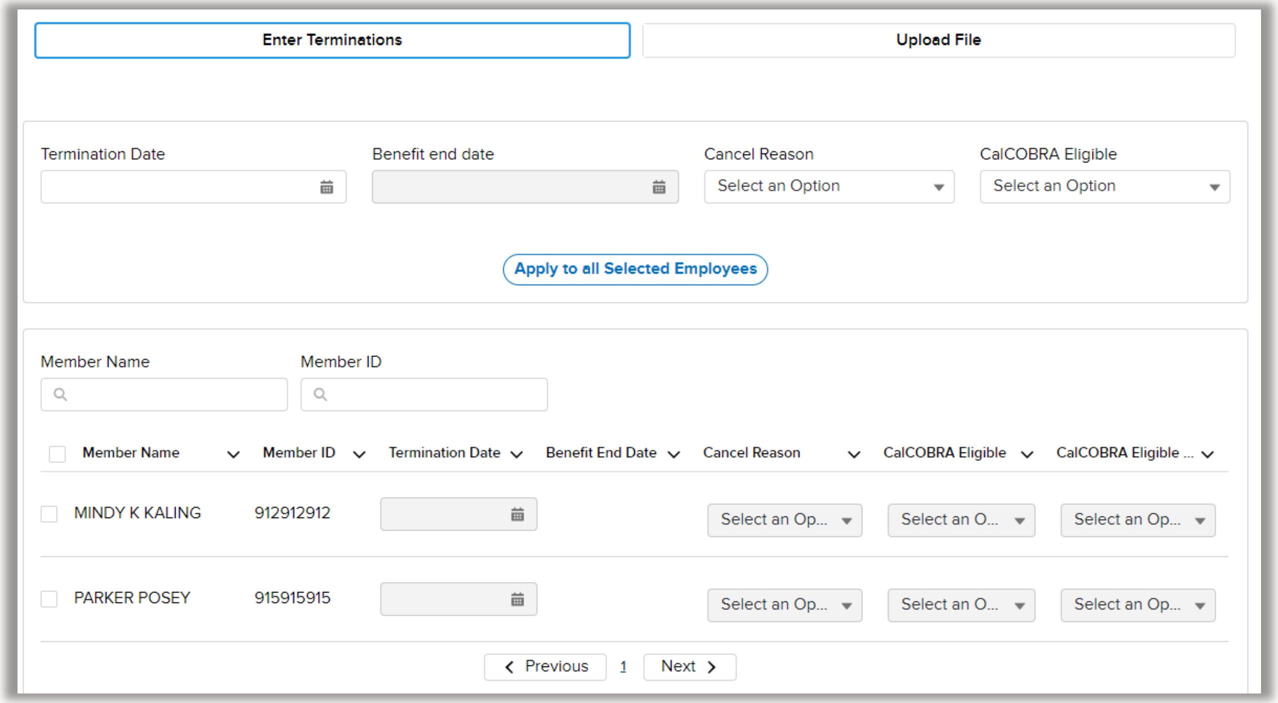
How – Use the toggle button to select how to provide the cancelation information. You can directly enter the information into the tool or provide a CVS document upload.



Bulk member cancelation continued

Direct tool entry

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

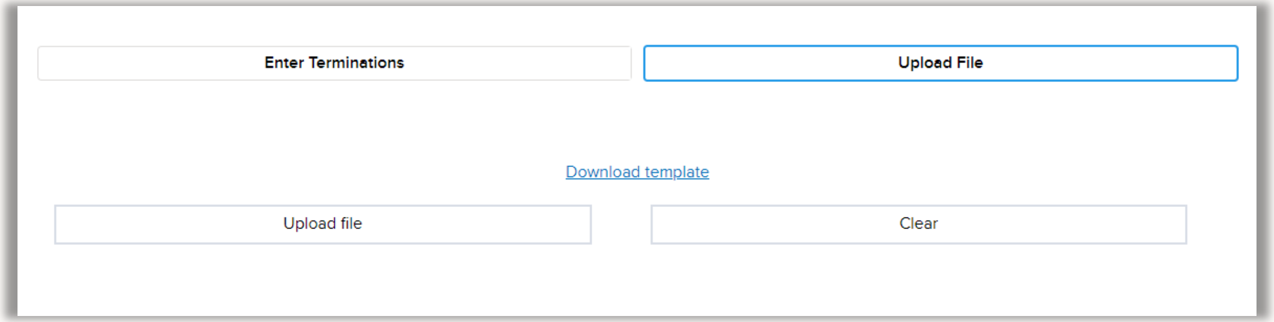


Note only Small Business groups will be asked for CalCOBRA eligibility. If you select Yes, the tool will automatically trigger the CalCOBRA enrollment to be sent to the member. You do not need to submit the paper CalCOBRA notification form when you notify Blue Shield through EET.

Bulk member cancelation continued

CSV document upload

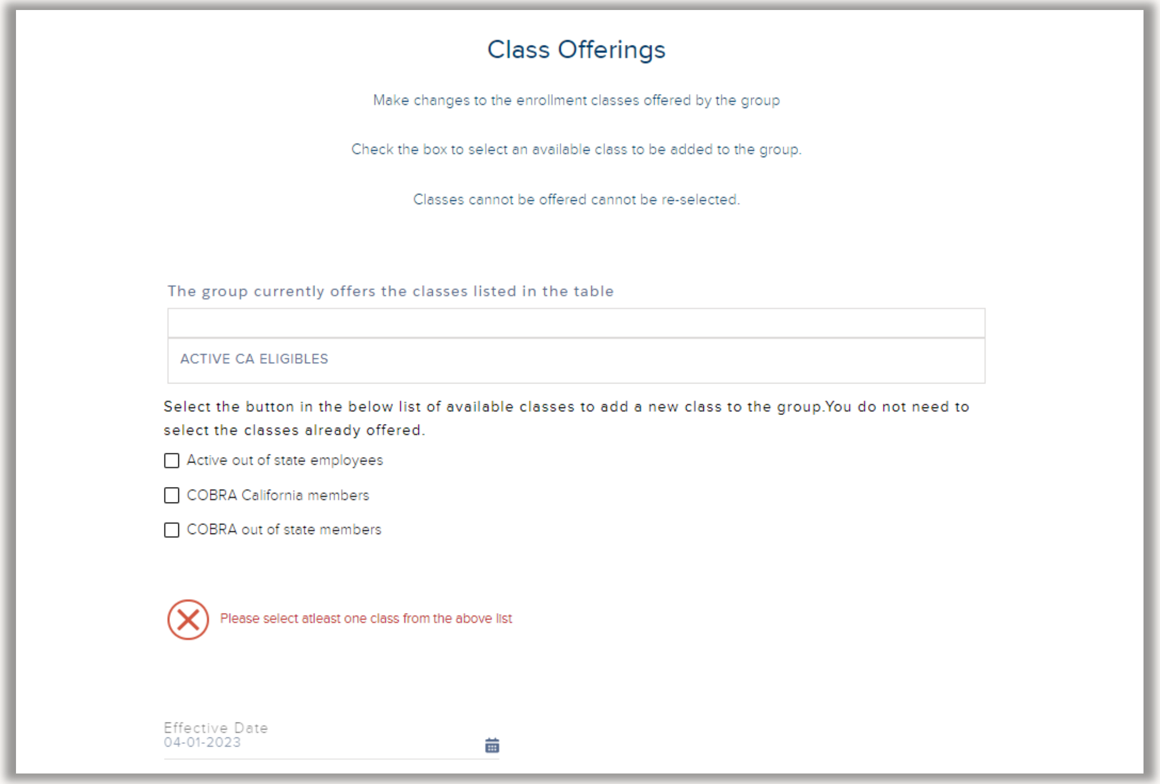
How – Click on the Download template link. Read the template instructions tab before filling in information. Provide the member name, cancel date, and reason into the corresponding columns. If a Small Business, enter in the CalCOBRA notification columns. Next, save the document as a CSV file. Navigate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



Class offerings

Use for - Small Group only. Add additional classes onto the group. We will not remove classes from a group, so once they are added they will remain active.

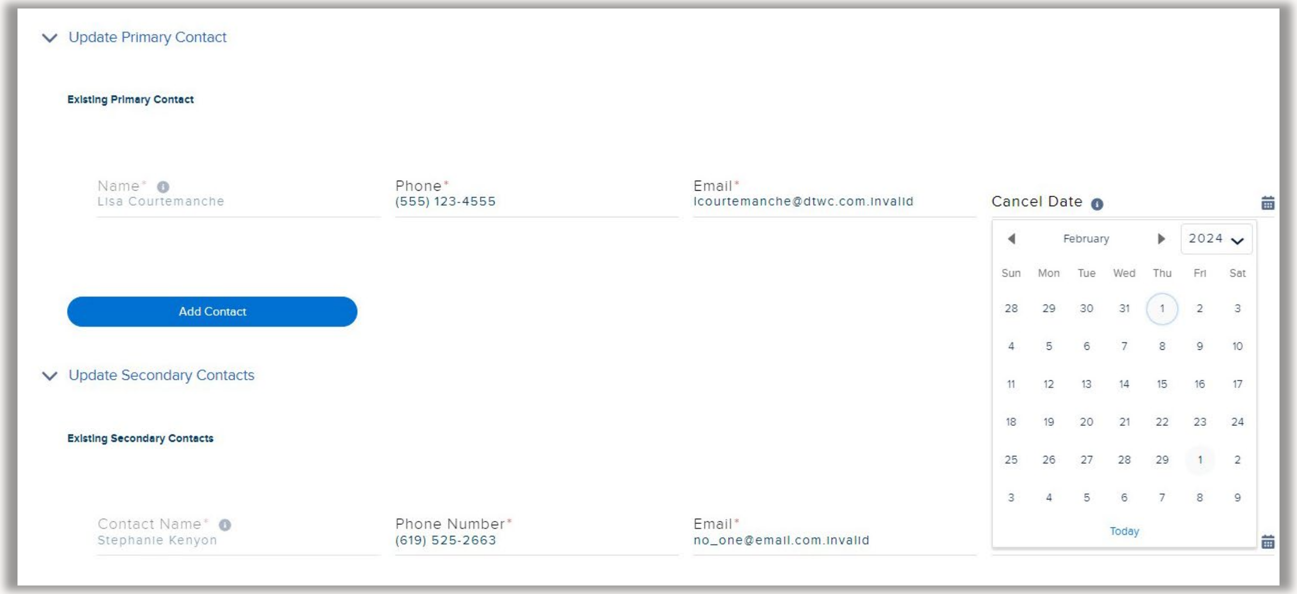
How - The tool will display the current active classes. Select the radio buttons to add a new class. The tool will display an auto calculated effective date for the change to take effect.



Group contacts

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

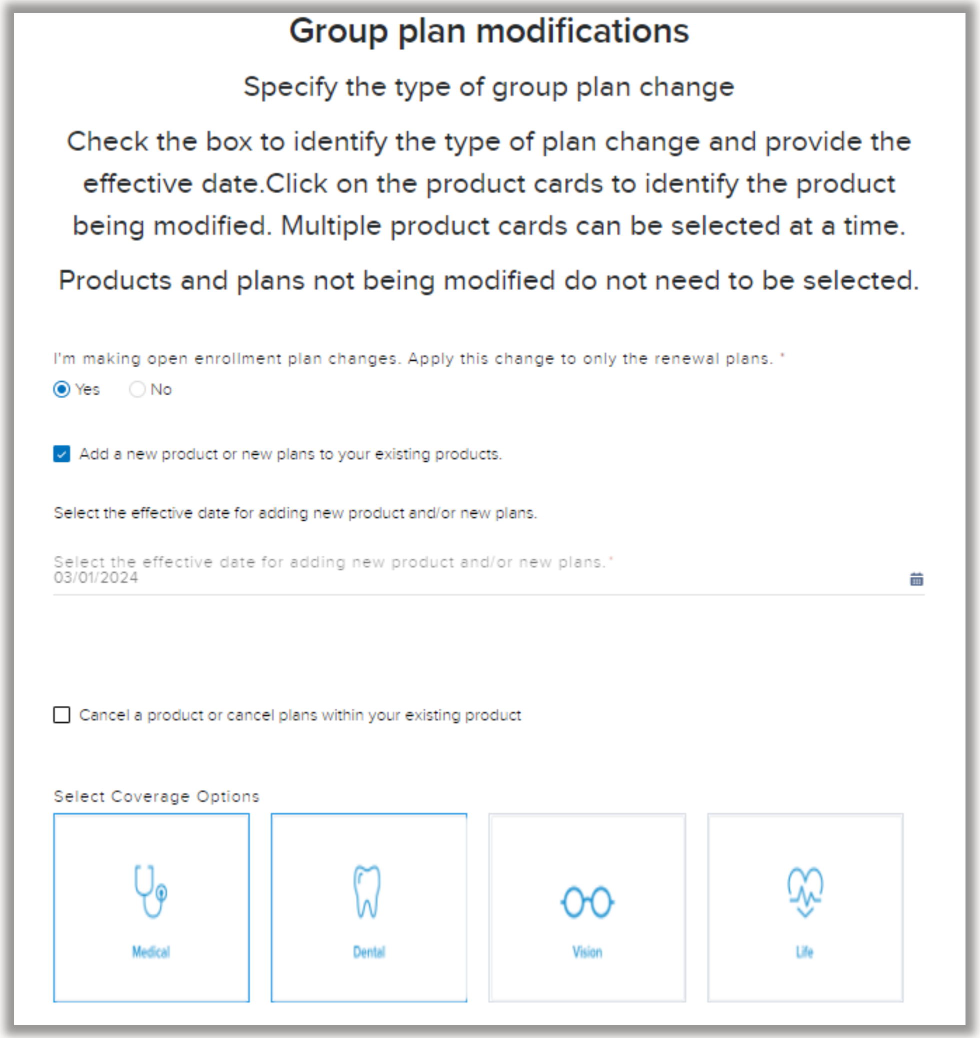
How - The tool will display the current active contacts. Select the add contact button to add new contact information into the fields. Enter a cancelation date to remove a contact effective that date. Validation will ensure that required contacts are always active.



Group plan changes

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

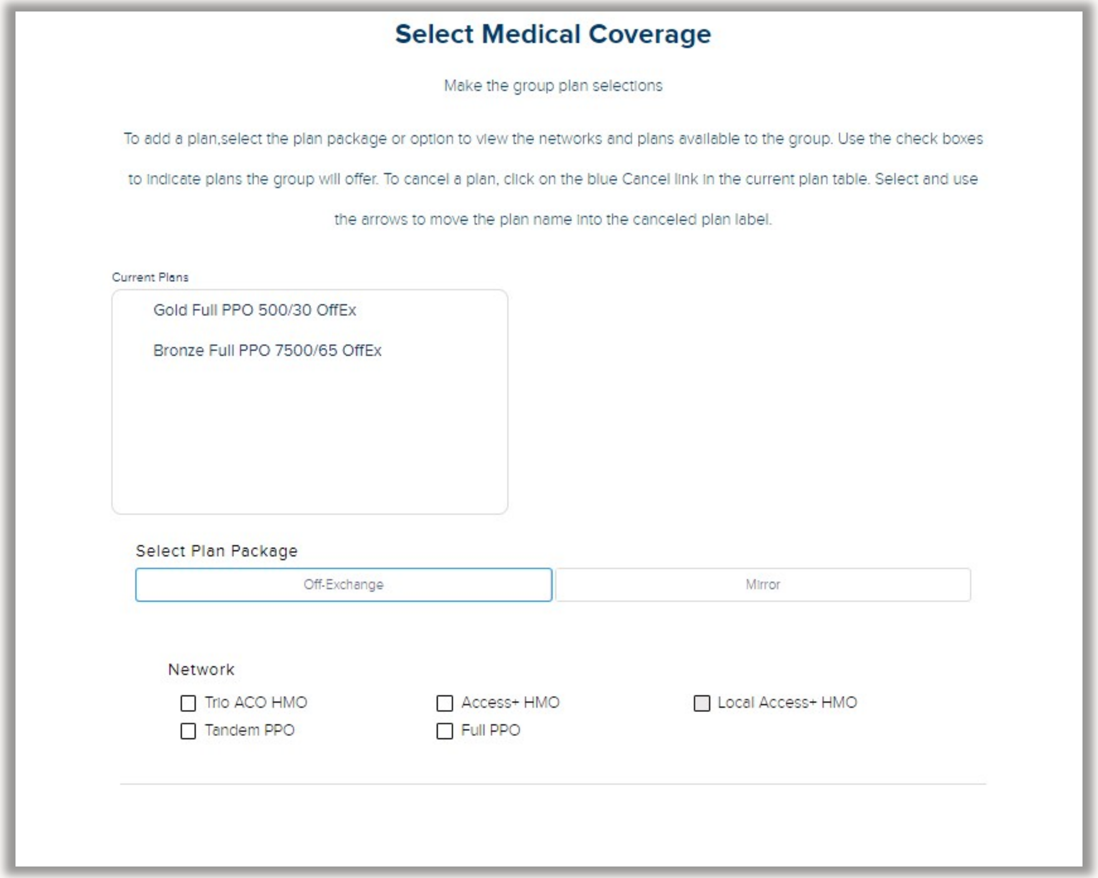
How - This transaction has a two-screen workflow. First, identify the type of plan change by checking the box next to that option, enter the effective date, and qualifying event information. Then, select the product related to this change (medical, dental, vision, or life) by clicking on the card. Multiple products/ cards can be selected in one transaction. On the second screen, the tool will show the current plans offered by the group in a scrollable list in the top left of the page.



Group plan changes continued

Add a plan or product

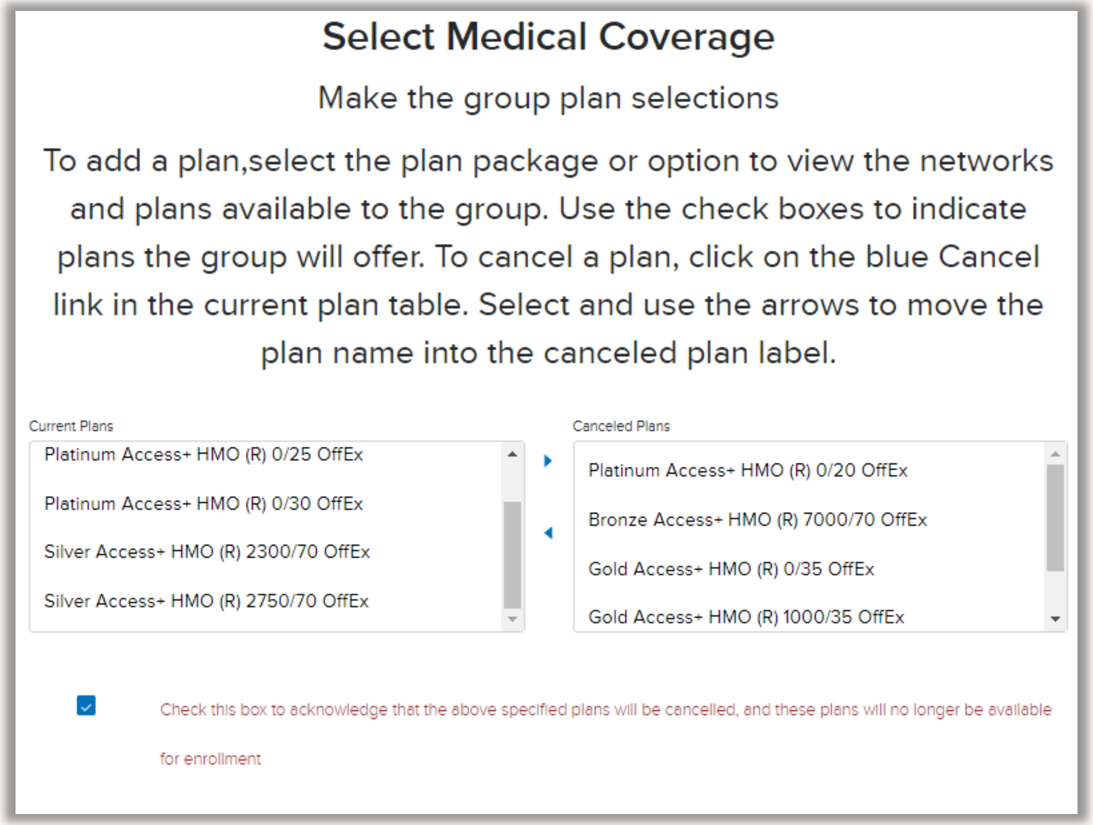
1) select the plan package (medical) or plan offerings (specialty) type.
2) select from the networks available to the group. Note we will not show out of network as selectable options.
3) a list of plans will be presented. Use the checkboxes to mark the plans for the group. Note use select all or deselect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



Group plan changes continued

Cancel a plan or product

1) In the list of current plans offered by the group, click on the Cancel link. This will expand into two boxes that use toggle arrows to move plan names between the current plans and plans to be canceled.
2) Move a plan into the Cancel box.
3) A confirmation message will display on the screen that the selected plans will be canceled and removed from the group offering.
4) Check the box next to the confirmation message.

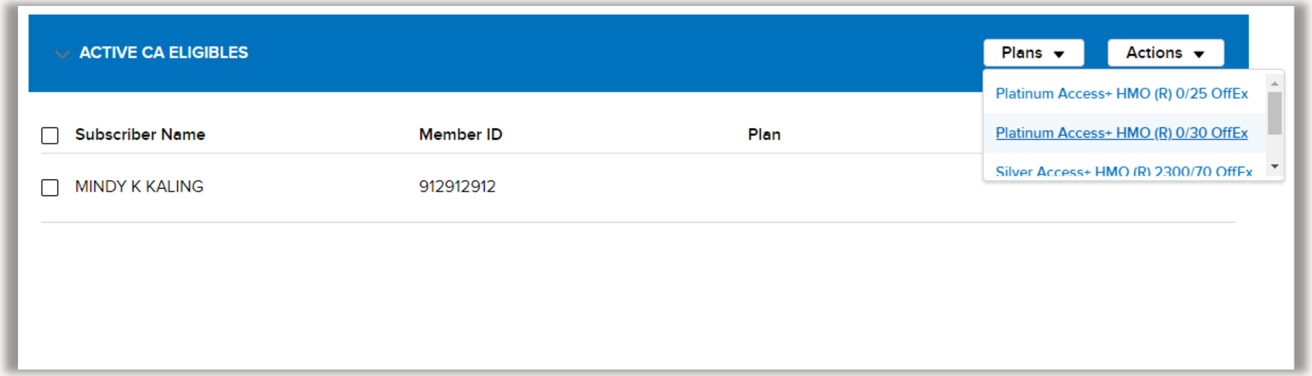


Note changes to medical benefits will prompt the tool to re-affirm the selections for the group's infertility rider.

Bulk member plan changes

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

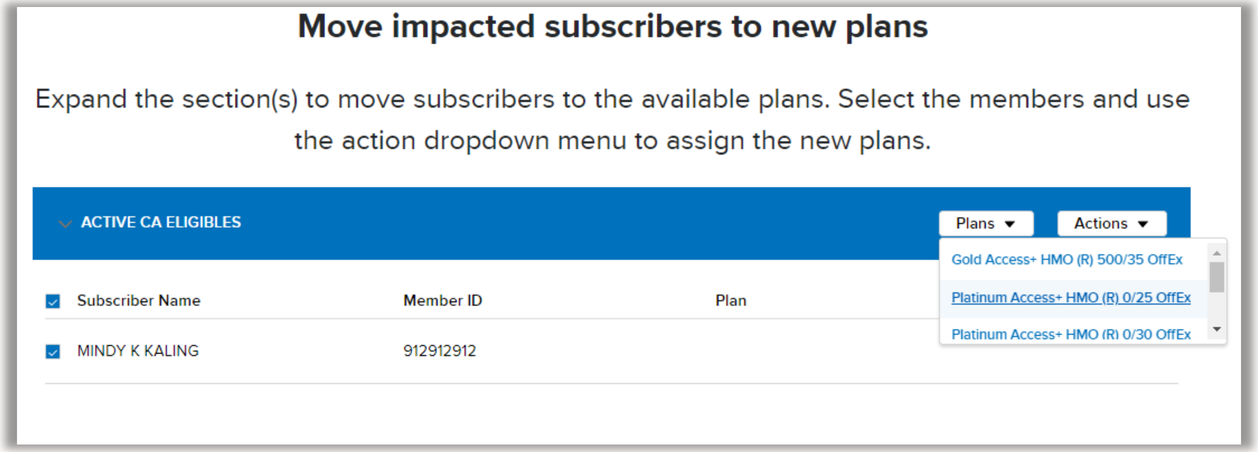
How – The bulk member plan changes are only available when you make a group level plan change. Off-cycle and open enrollment plan changes initiate different rules so refer back to the Blue Shield Admin guide to understand the different enrollment rules.



Bulk member plan changes

Off-cycle plan changes

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

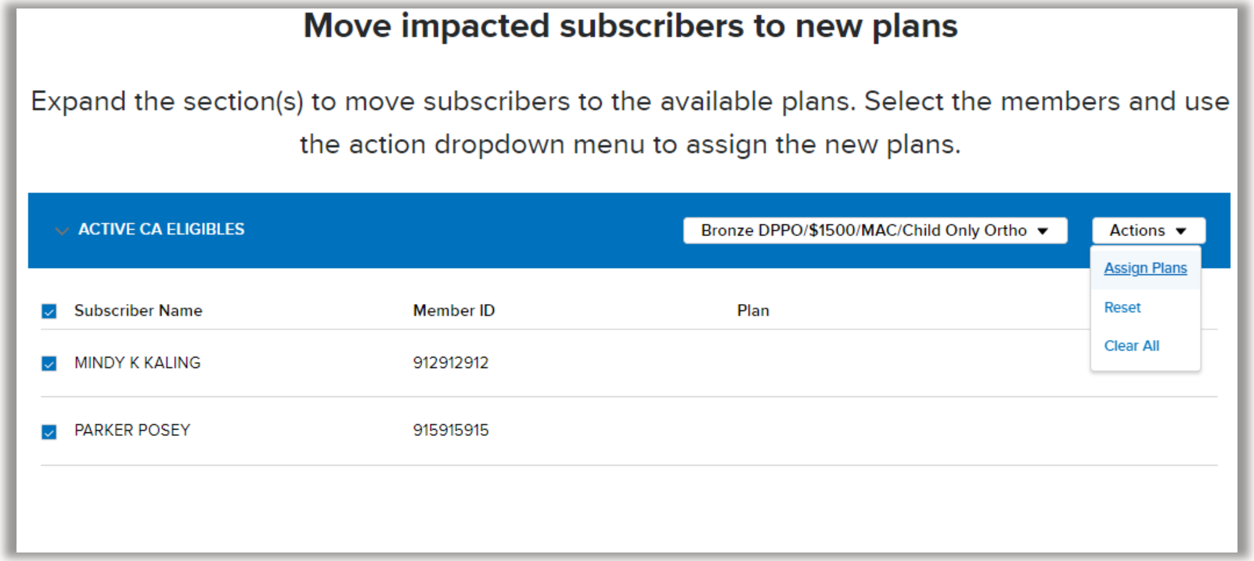


Note When you make off-cycle plan changes only those impacted by the change will be eligible for a Special Enrollment qualifying event. Refer to the Blue Shield Admin Guide for Special Enrollment details.

Bulk member plan changes

Open enrollment changes

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

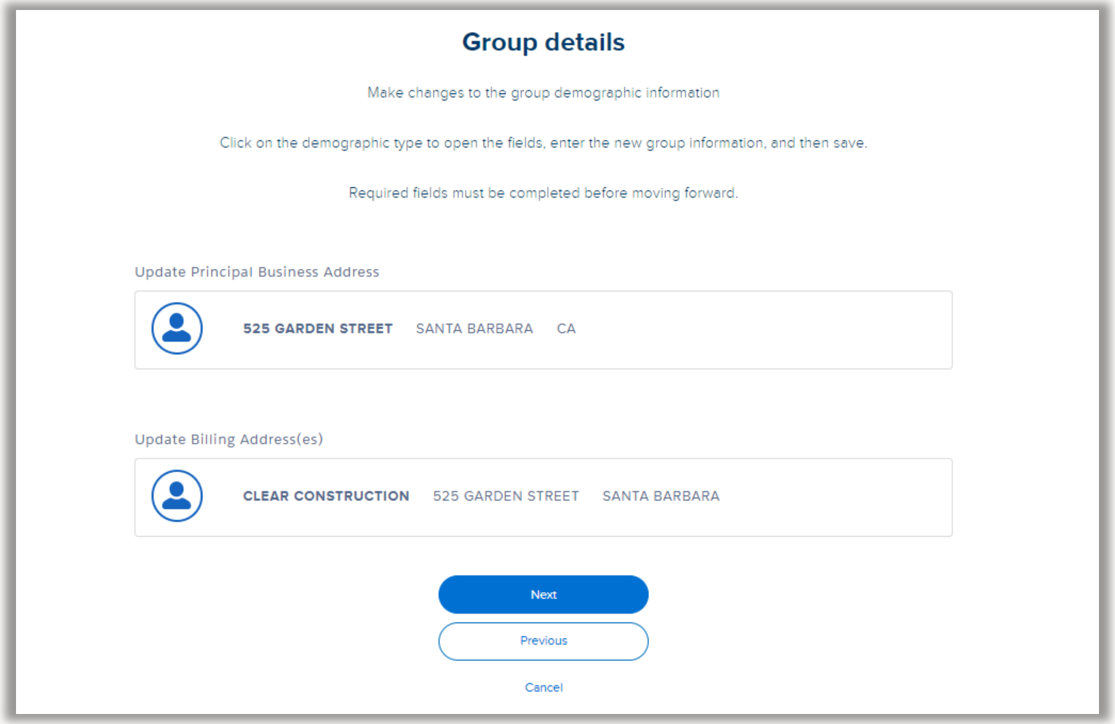


Note When you make open enrollment changes all subscribers are eligible for a Special Enrollment qualifying event. Refer to the Blue Shield Admin Guide for Special Enrollment details.

Group details

Use for - Update the principal business address, the business email, phone number, and mailing contact, the billing address, billing telephone, and billing contact.

How - Click on the address boxes to open additional fields and begin typing in new information. Click on the save button in the card before clicking Next.

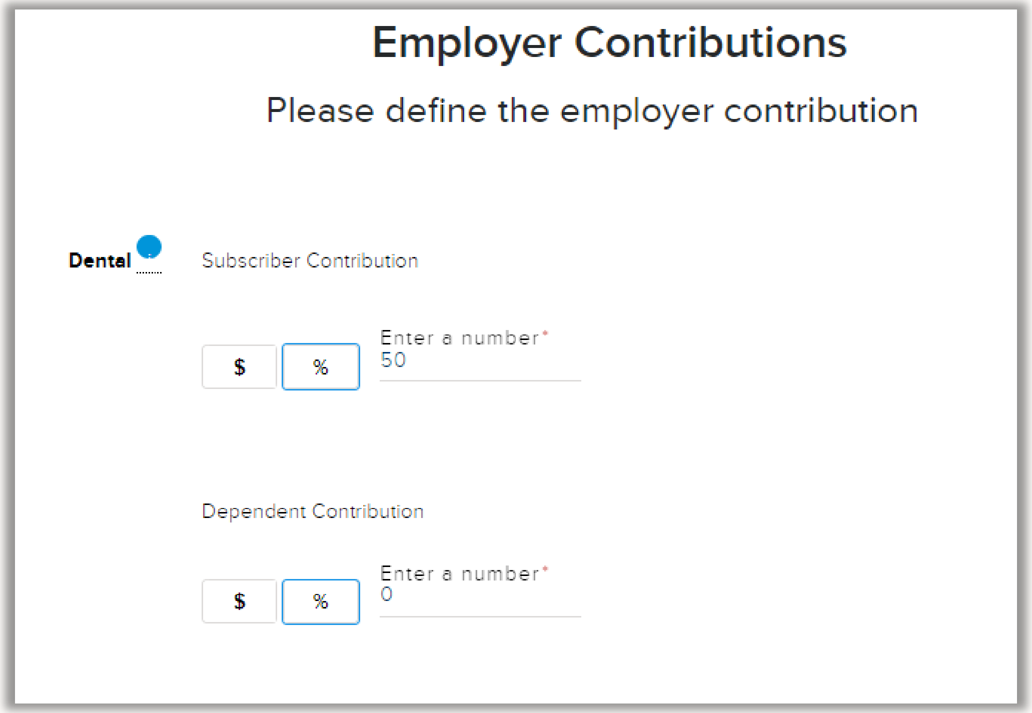


Note users cannot add new contacts this is just updating the ones that we are already associated to this group.

Employer contributions

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

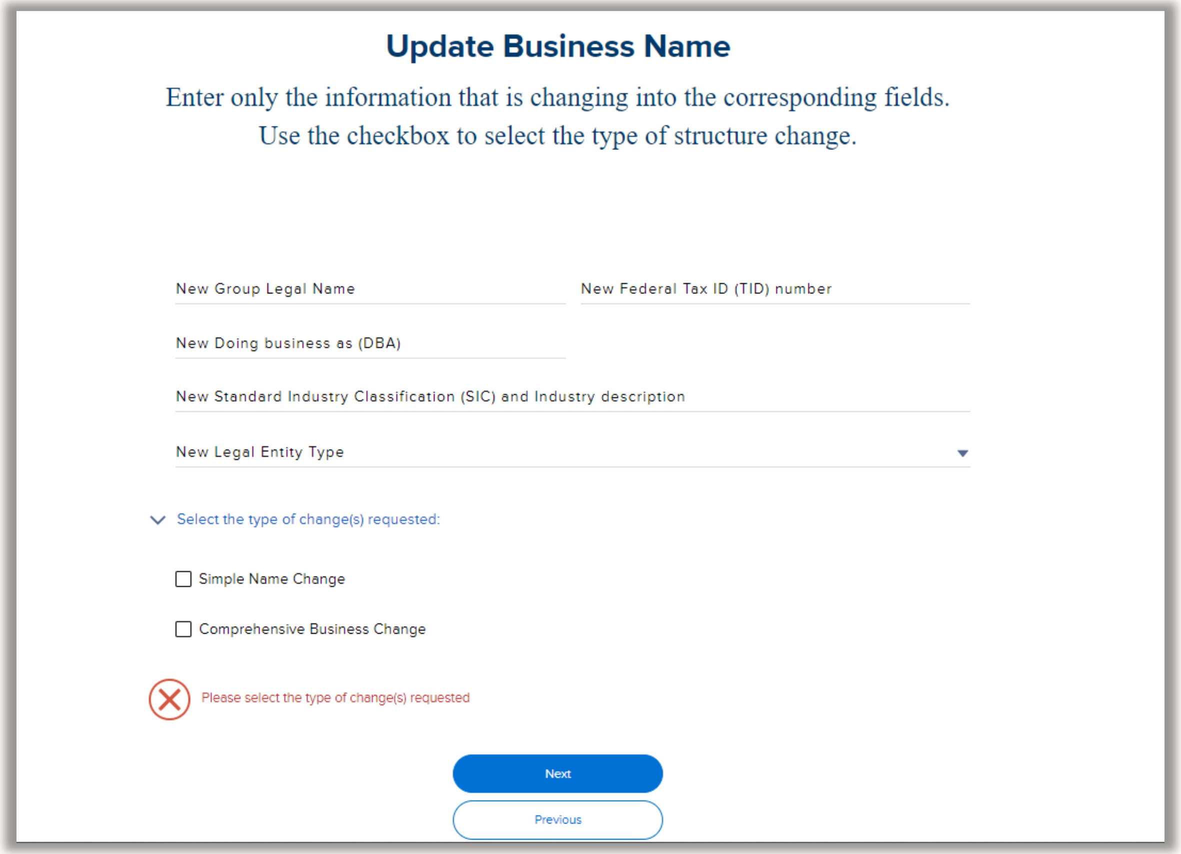
How – Use the checkboxes to select the offered products to make changes. Then select the checkbox to indicate if the contribution is a dollar amount or percentage amount and enter the desired amount.



Structure change

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

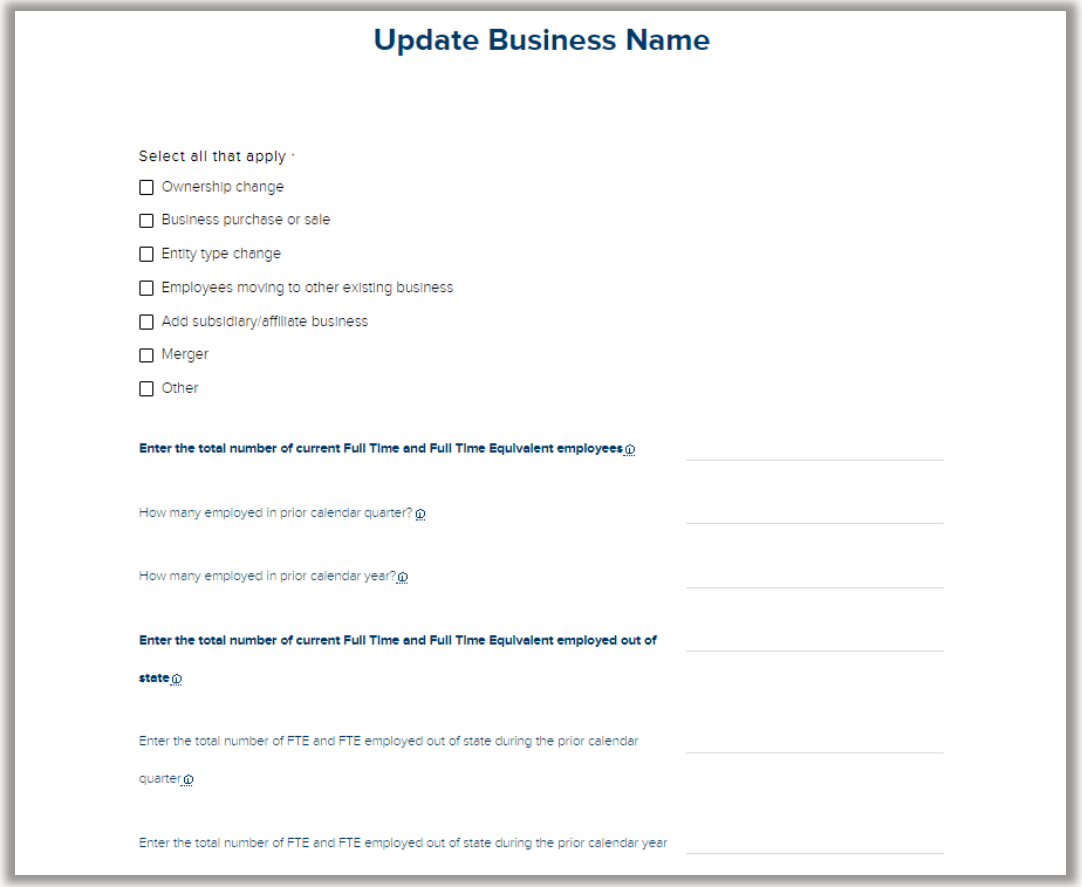
How – Enter in the new information into the respective fields. Use the check box to indicate the level of changes being submitted.



Structure change - complex

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

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



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

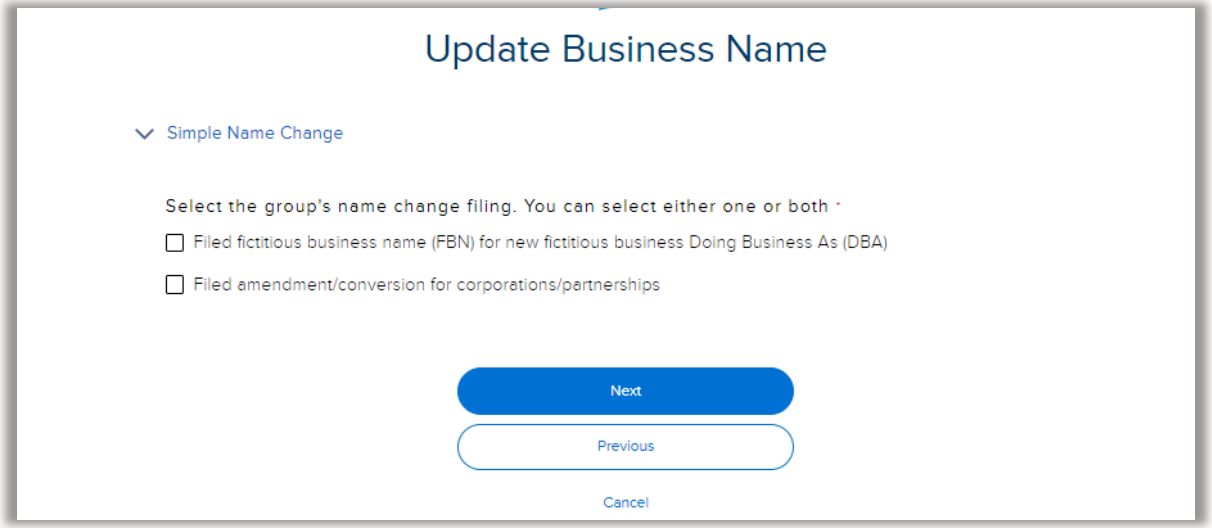
Enter the total number of FTE and FTE employed out of state during the prior calendar quarter

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.

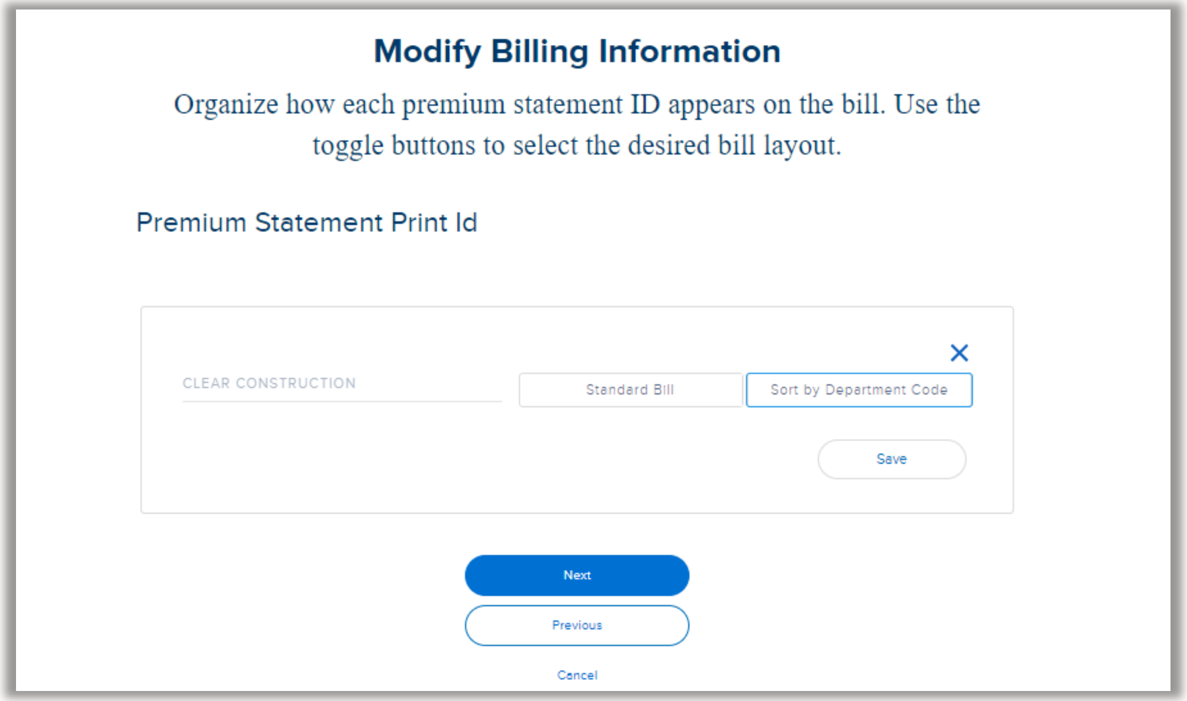
How – Check the box next to the type of change.



Billing attribute

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

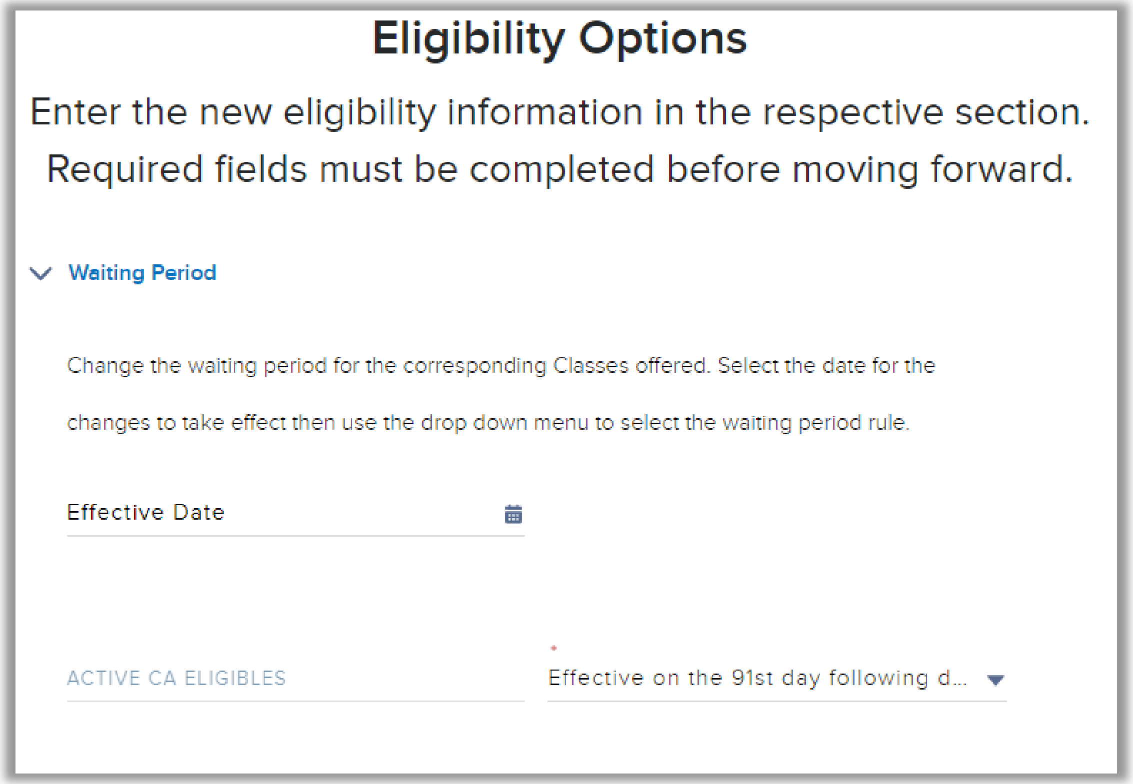
How – Use the toggle button to select the standard bill layout or the department code layout that organizes members by their department code.



Eligibility Options: waiting period

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

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

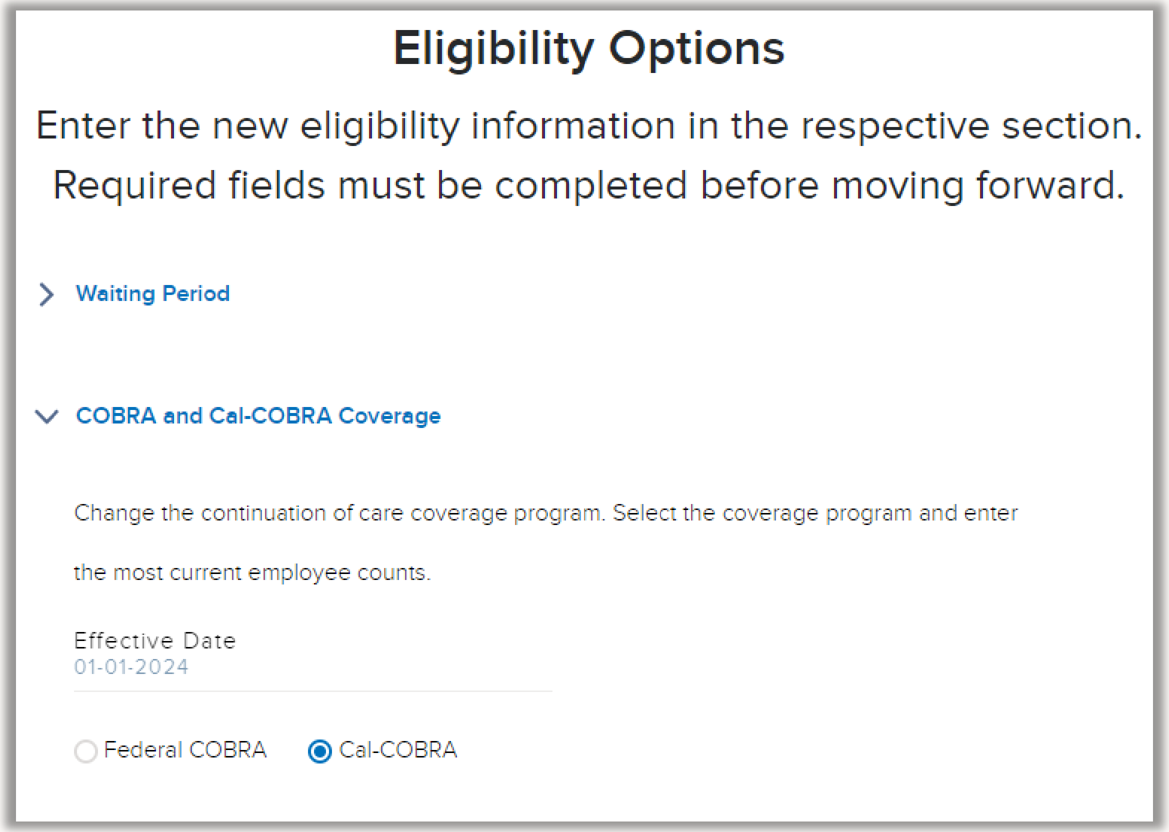


Note you do not need to reselect existing waiting period rules if they are not changing

Eligibility Options: continuation coverage

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

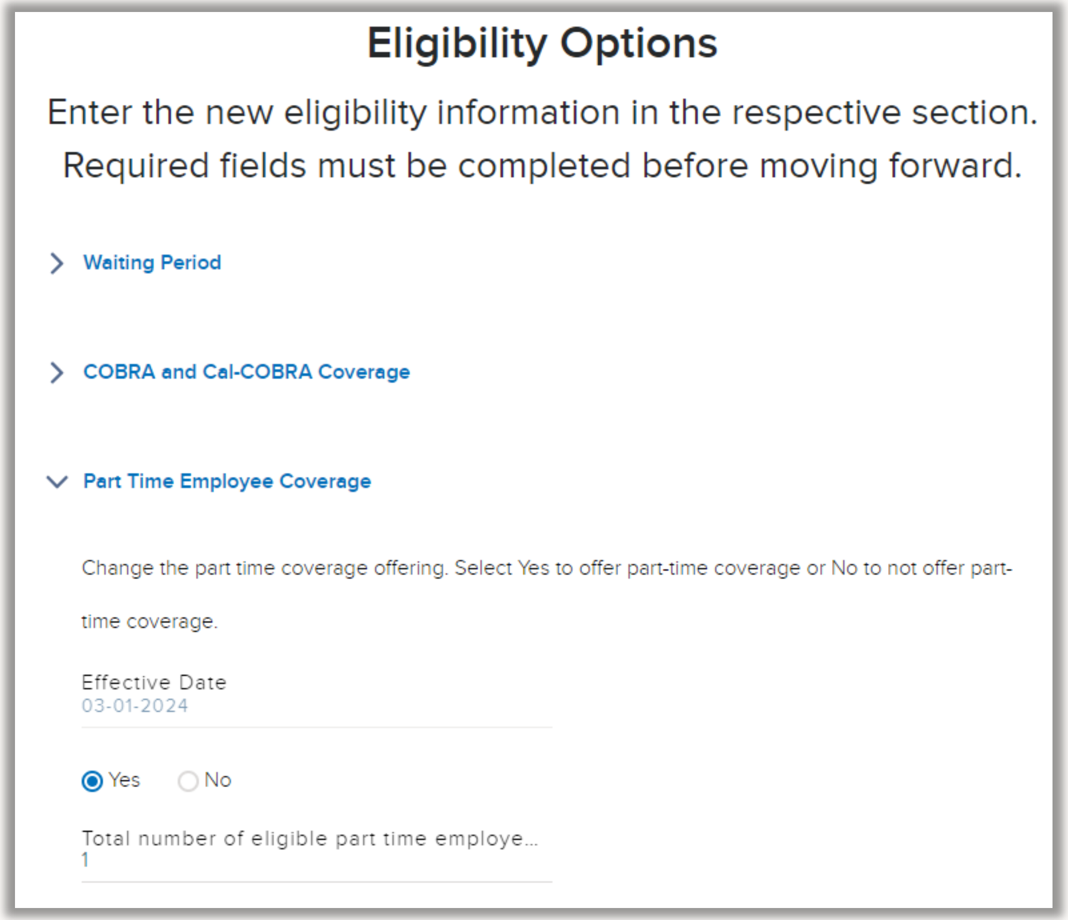
How – The effective date of change will always be the first of the year. Use the toggle button to select the continuation program and provide the eligible employee counts.



Eligibility Options: continuation coverage

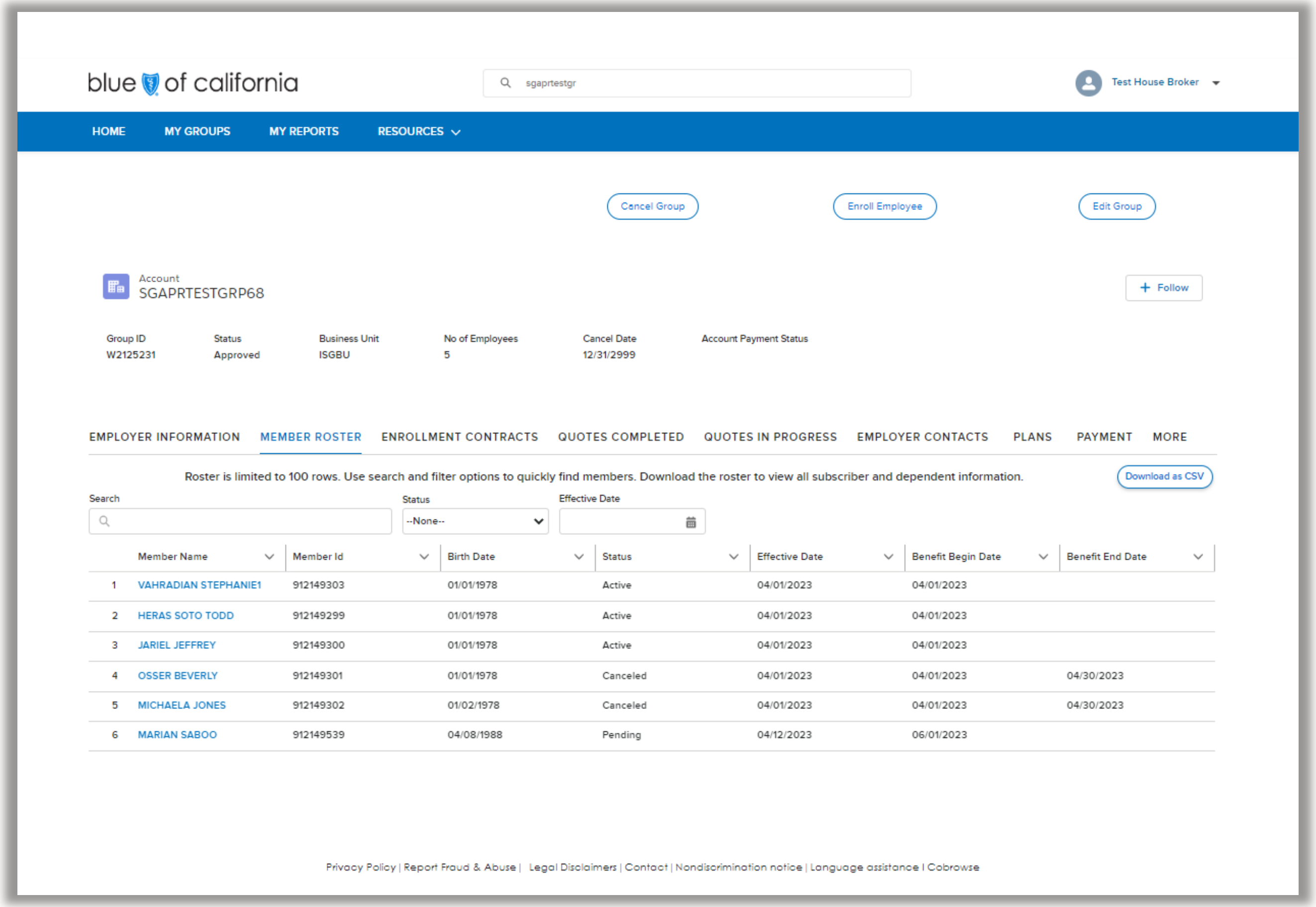
Use for – Small Group only. Update the group contract to add or remove coverage for part time employees.

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



Member maintenance

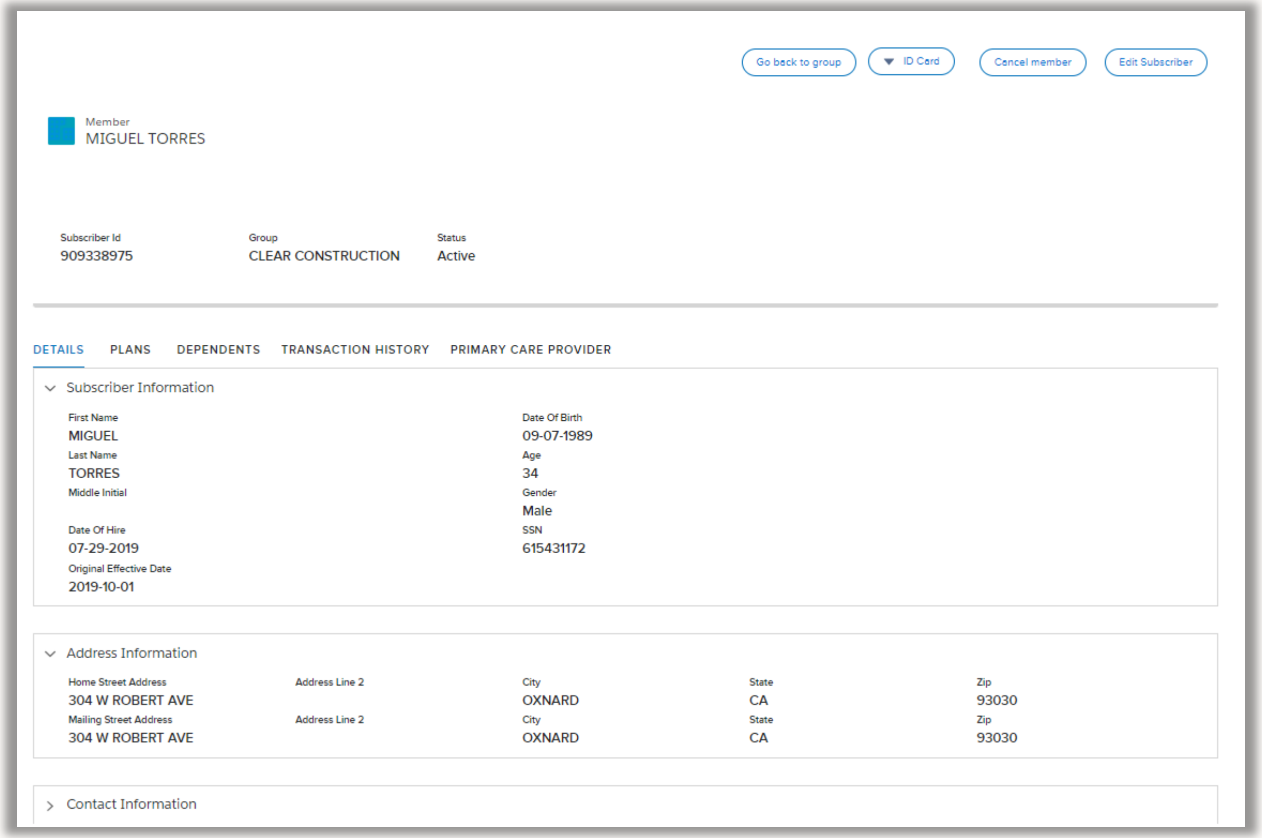
To initiate a member maintenance record change, find the group and then the member. Navigate to the Group Account page and click on the Member Roster tab. The tab displays the current contract period employees. Select an employee from the roster by clicking on the name.



Member account

Like the group account page, the member account page holds all of the valuable enrollment information for the selected person.

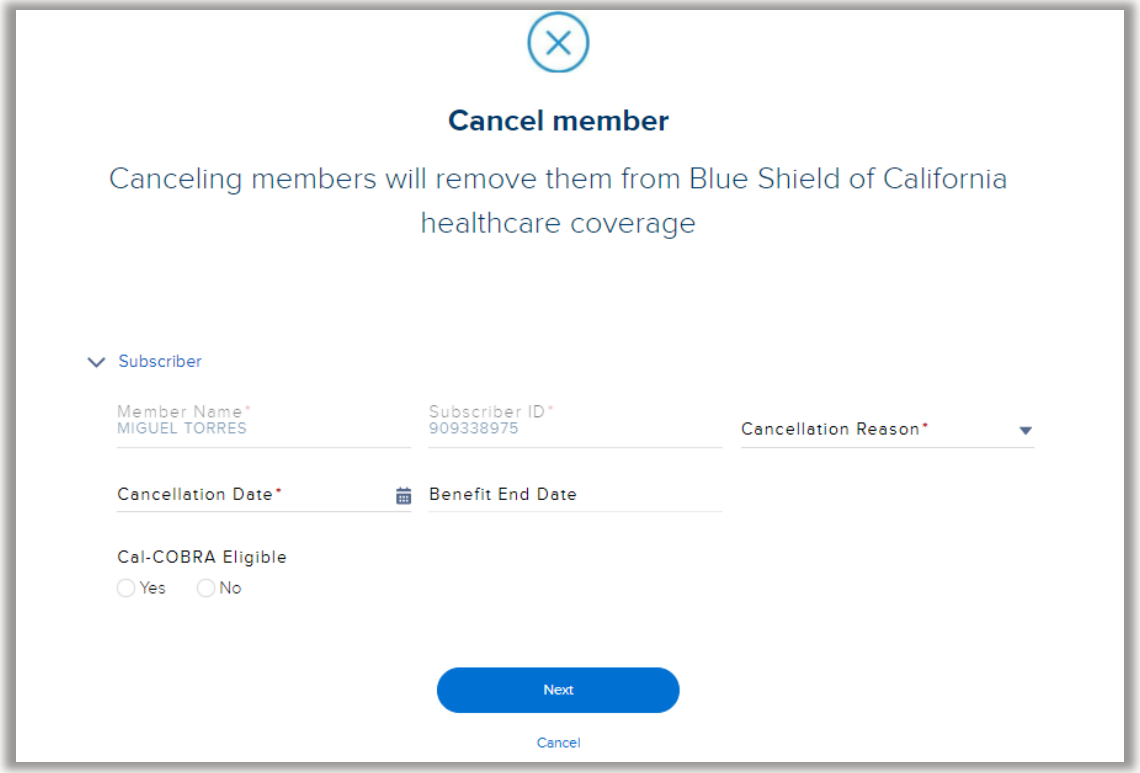
Click the buttons in the top right corner to initiate a transaction for this subscriber and any enrolled dependents.



Member cancelation

Use for – Canceling an employee's Blue Shield coverage. If the employee has dependents this will also cancel their coverage.

How - Click on the cancel member button on the member account page. Provide the cancelation reason and date.
If your company offers CalCOBRA coverage you will see an additional field. Indicate if this member will elect the CalCOBRA coverage and we will send out the CalCOBRA packets for enrollment. Companies offering Federal COBRA will not have this additional field.

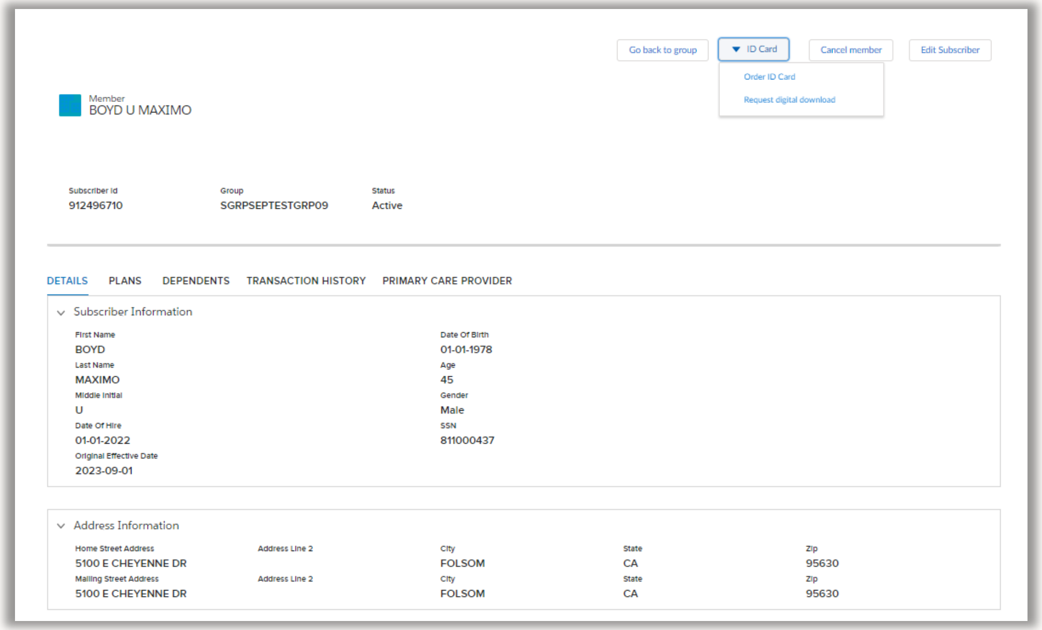


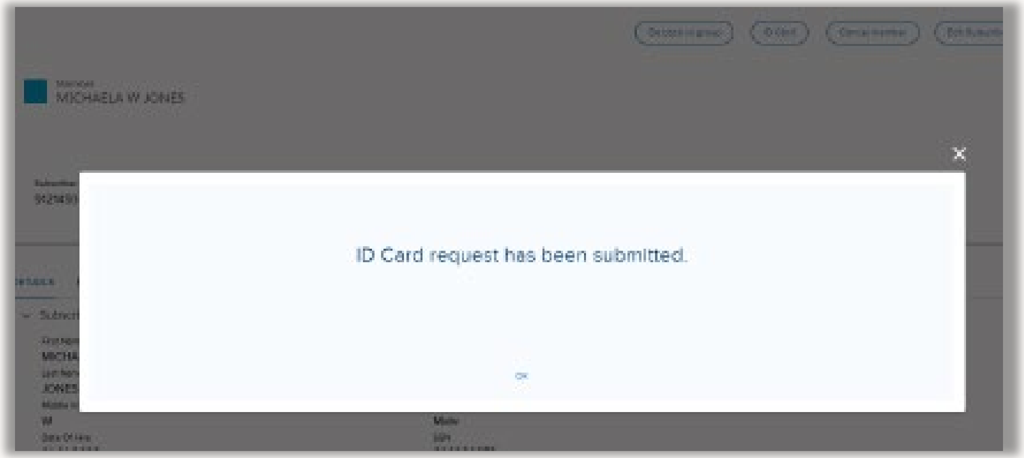
Order ID cards

Use for – Reissuing member ID cards. If the employee has dependents this will send new ID cards for the household.

How - Click on the ID card button on the member account page and select the Order ID option. A window will open confirming the ID card order.

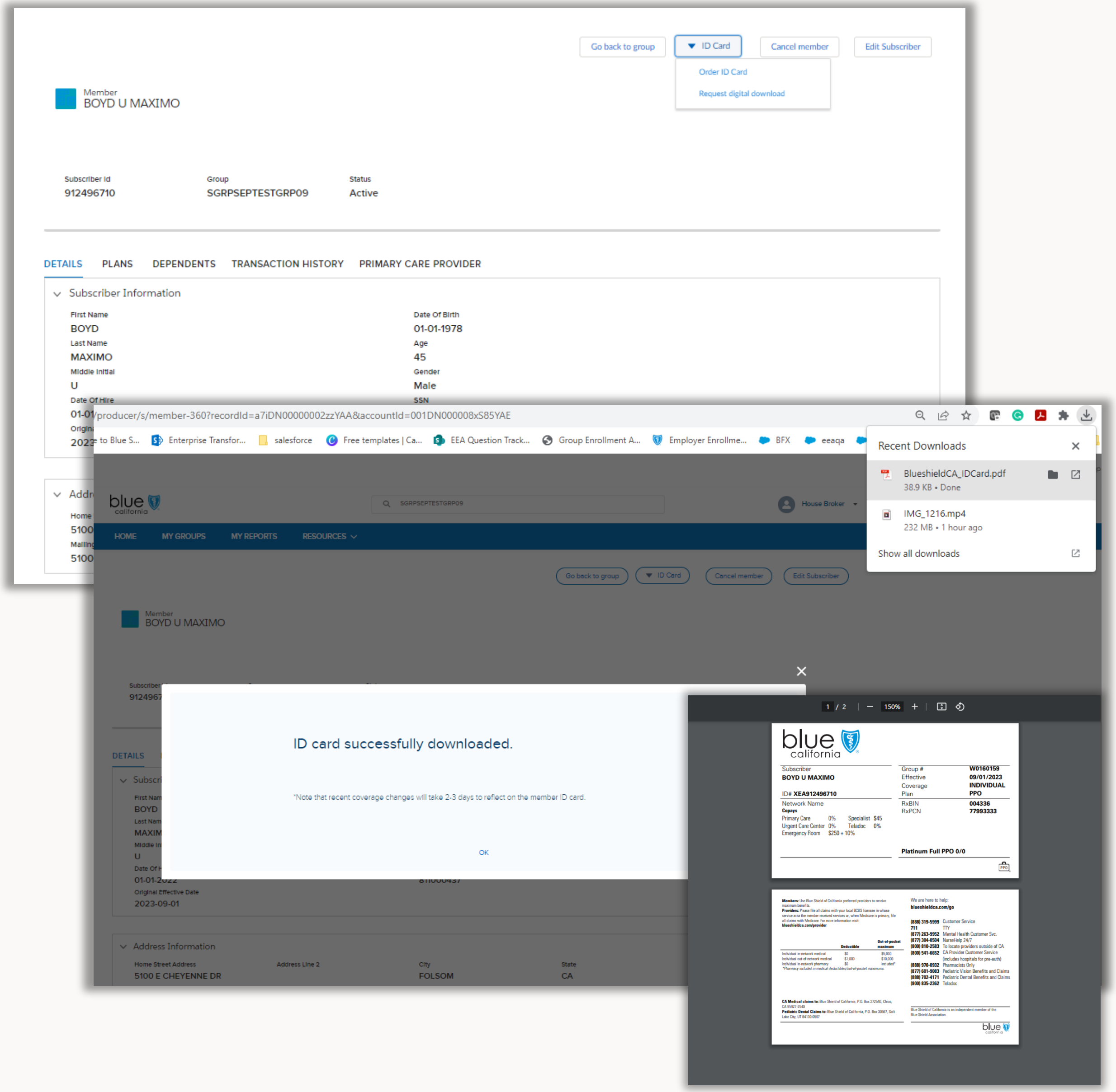
Tip! ID cards will be sent to the channel identified by the member. If the member selects digital communications and digital ID cards, we will send the reissued card to their Blue Shield app. If the member selects paper communications and paper ID cards, we will mail the ID card.





Download ID cards

Use for – Reissuing member ID cards. If the employee has dependents this will send new ID cards for the household.
How - Click on the ID card button on the member account page and select the digital download option. A window will open confirming the ID card order. Only medical ID cards are available at this time.
Tip! Changes to the member record can take up to 2 business days to generate a new ID card.

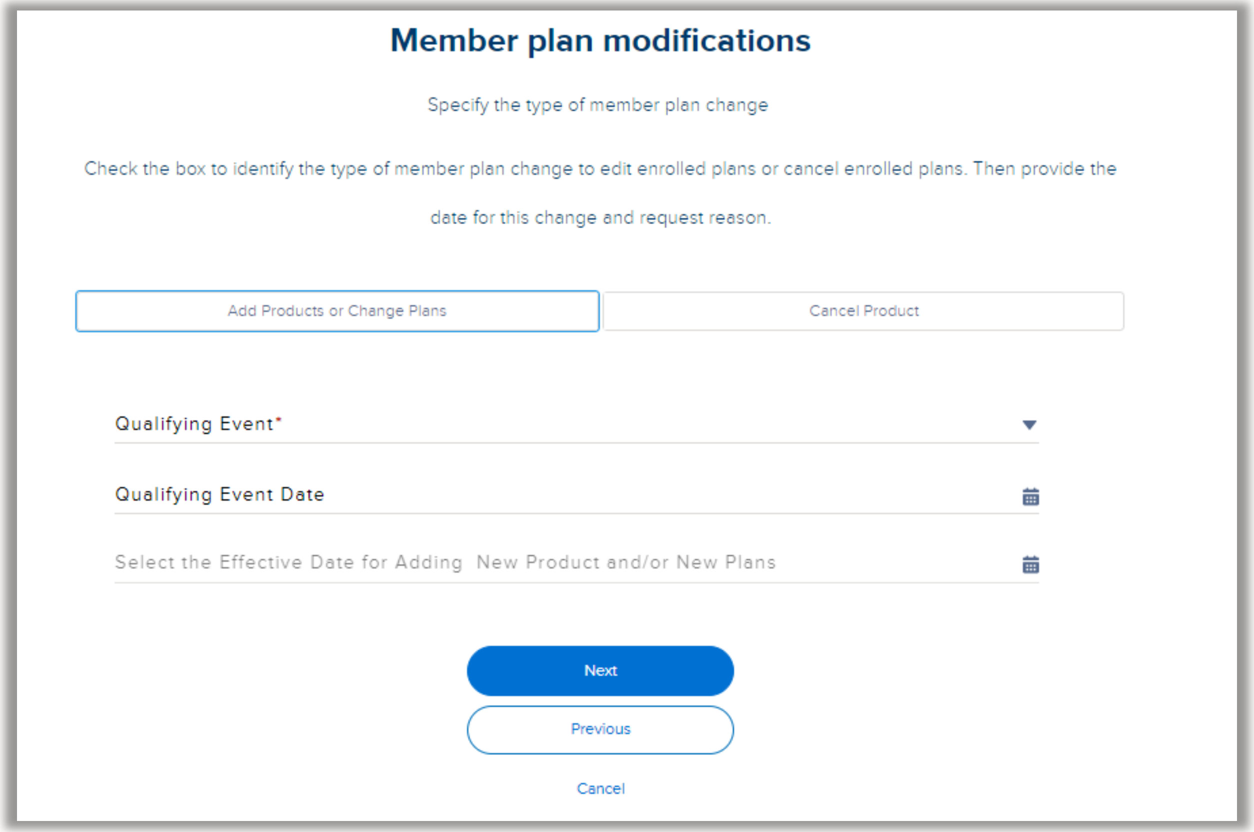


Member plan changes

Use for – Member plan changes to products and plans.

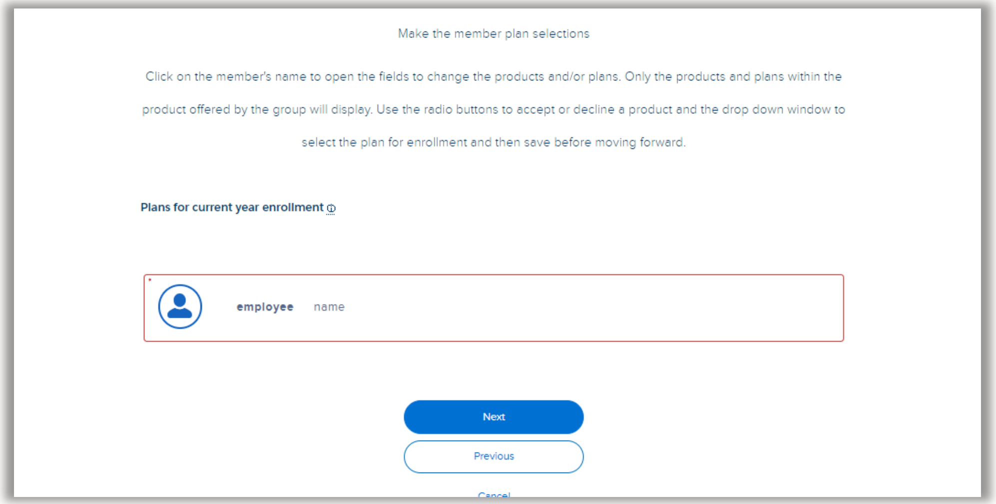
How - This transaction has a two-screen workflow.

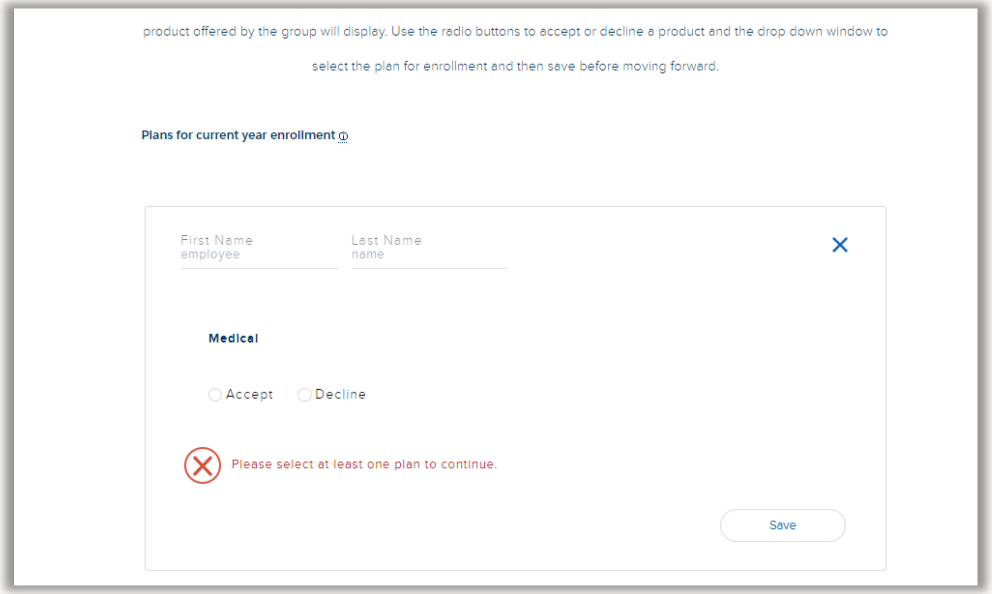
1) Identify the type of change with the toggle button, enter the effective date, and qualifying event information.



Member plan changes continued

2) Click on the member's name to open the box and view the current plan elections. Use the radio buttons to accept or decline product coverage. For accepted products, use the dropdown window to the right to select an available plan. Click on Save.



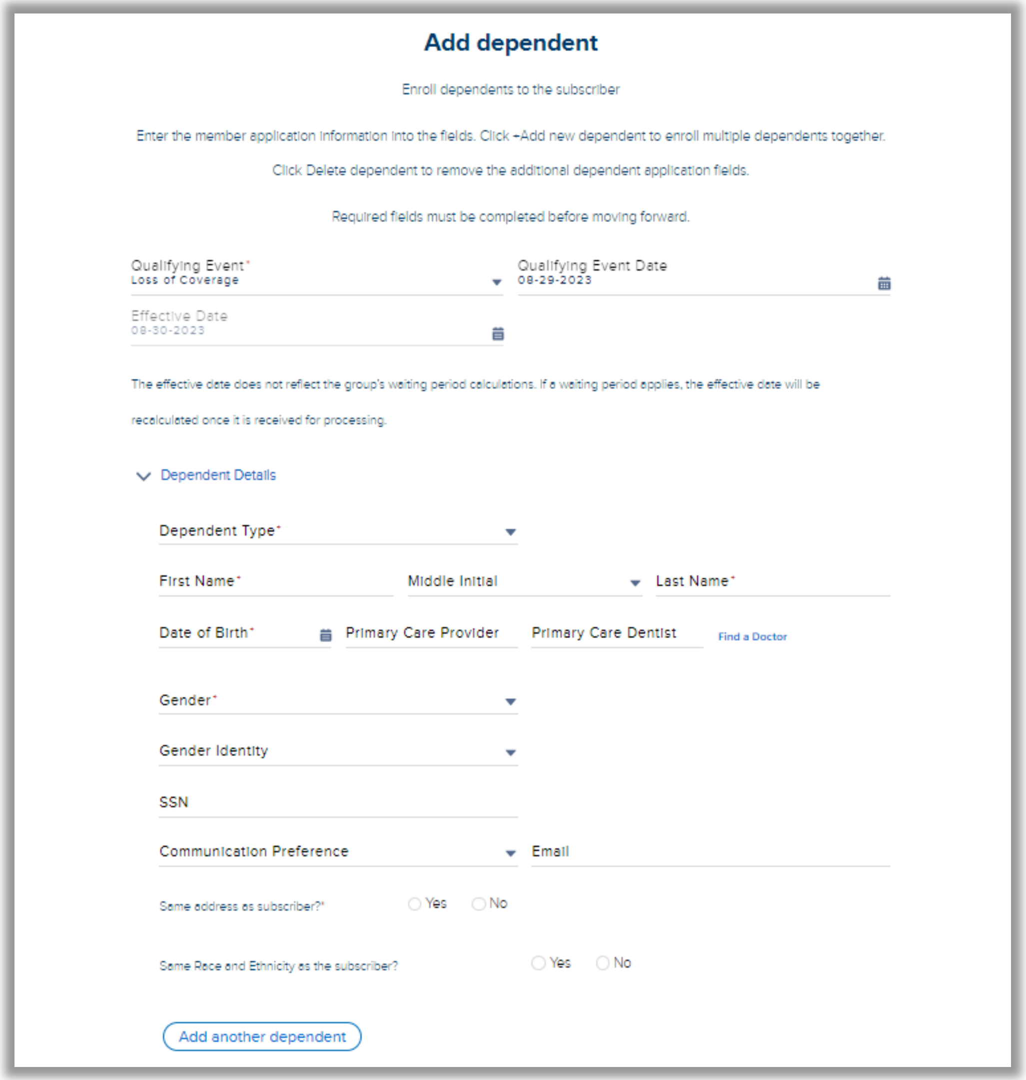


Add dependents

Use for – enroll dependents to an existing subscriber.

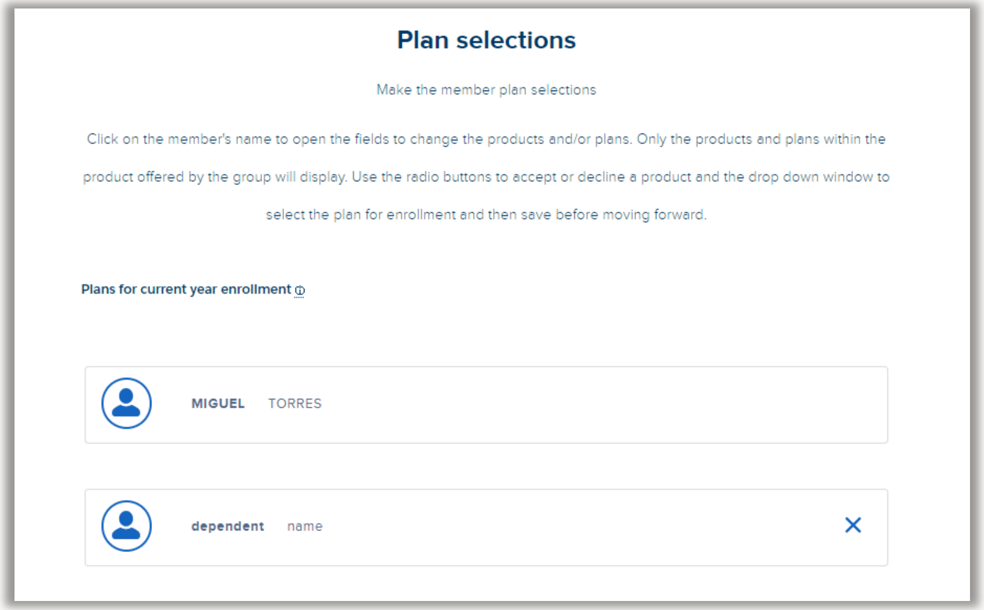
How – This transaction has a two-screen workflow. These are the same fields as the EEA form.

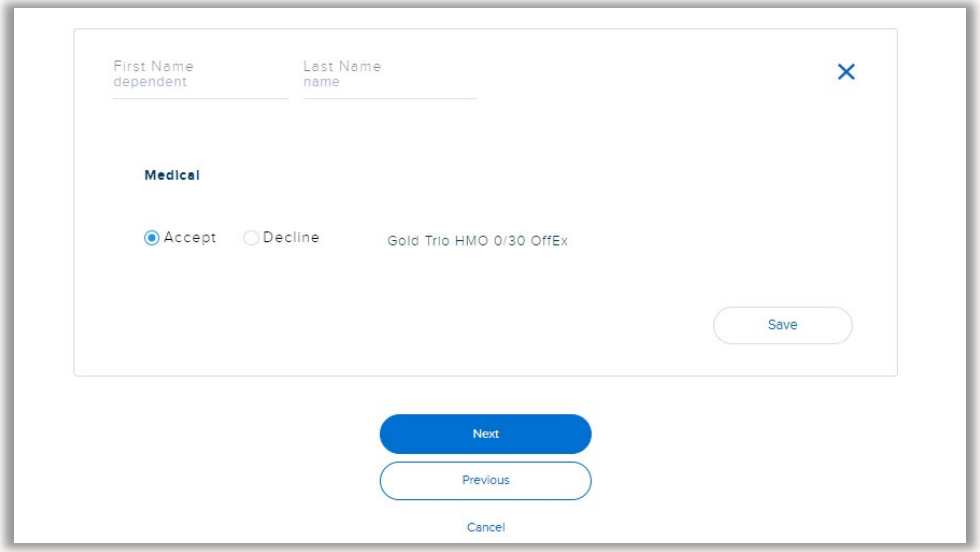
1) Enter the enrollment application information by directly typing into the fields.



Add dependents continued

2) Select the plan elections for the dependent based on the employee’s elections. Click on the Save button before moving to the next step.

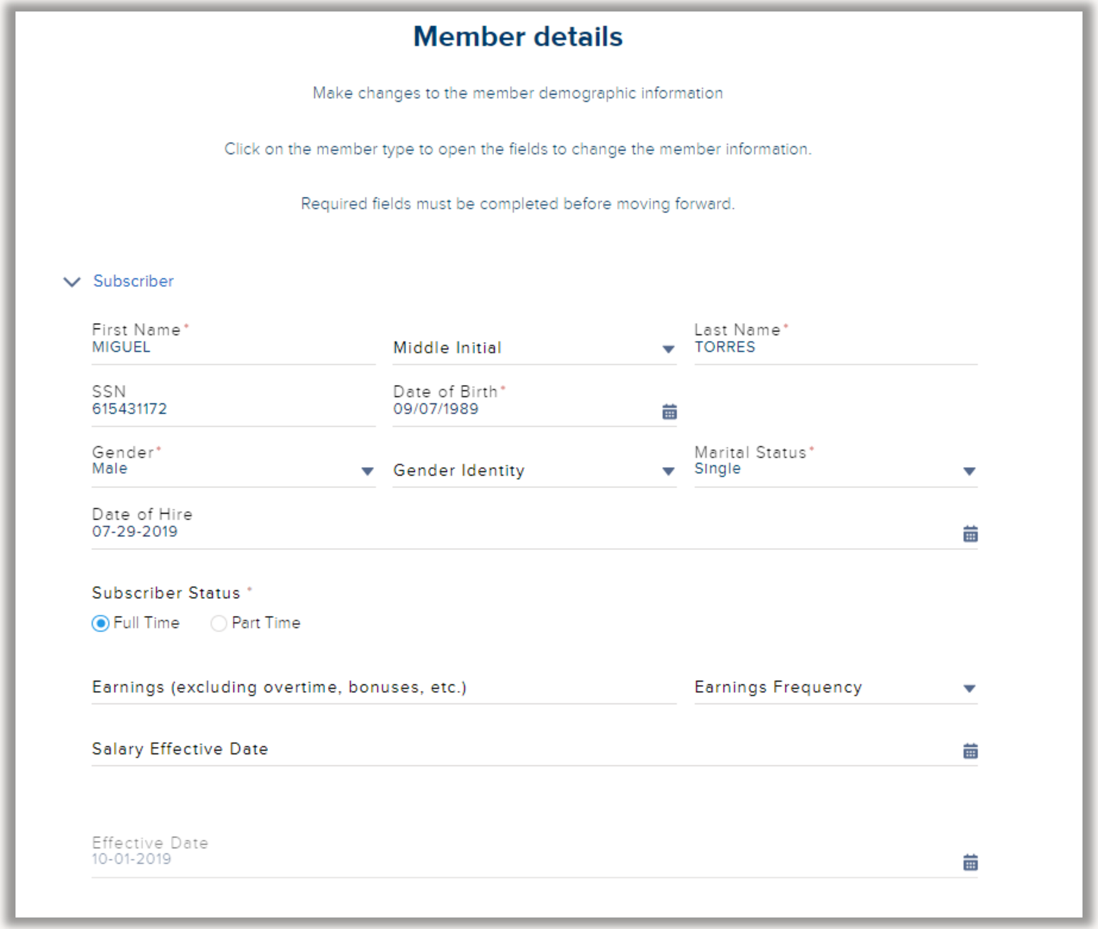




Member details

Use for – Update the subscriber and any dependent demographic information (name, DOB, DOH, gender, etc.).

How – Directly type in the new information to the fields. If the subscriber has dependents, use the accordions to expand the dependent fields for updates.

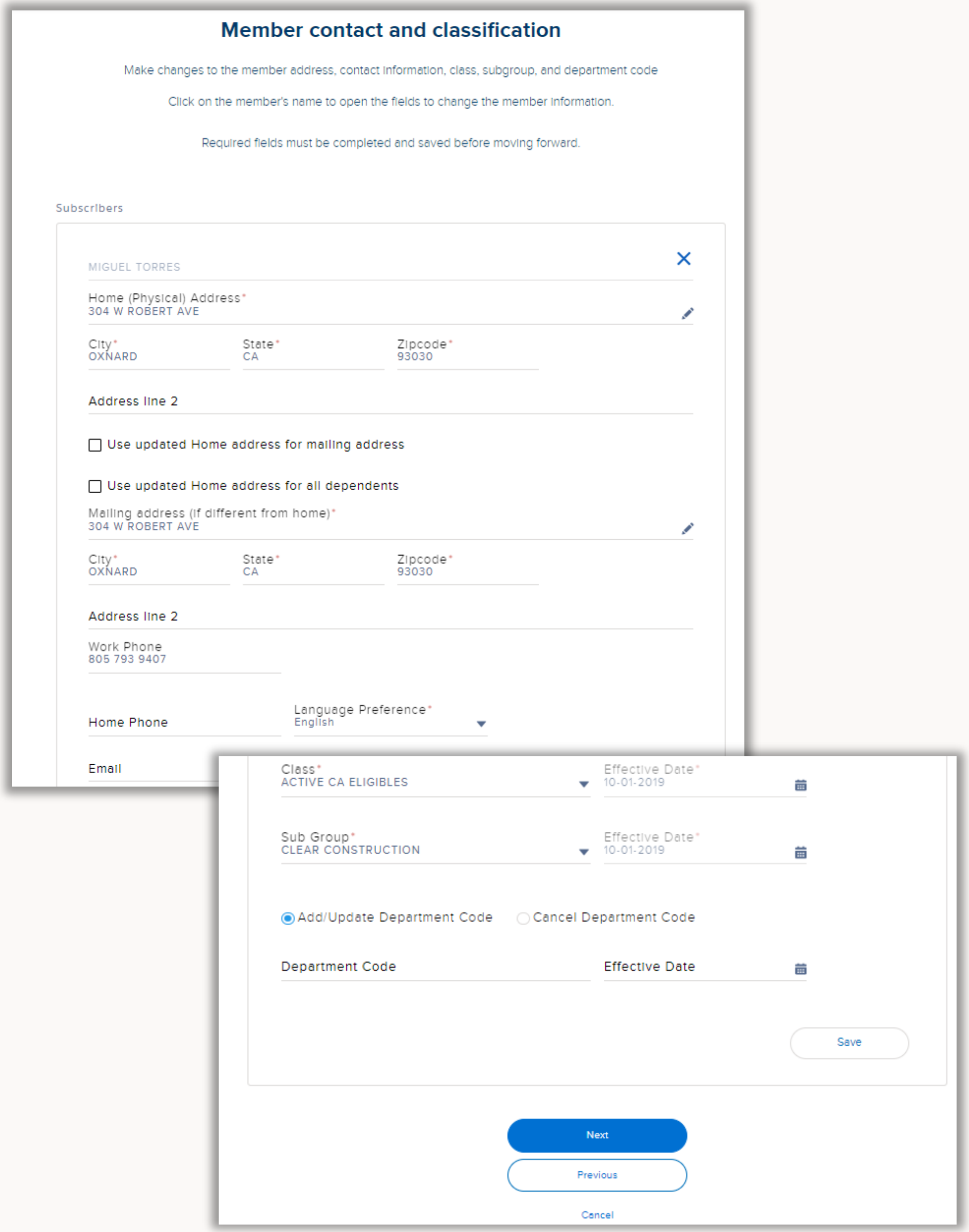


Member contact & classification

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

How – Click on the box with member's name to edit the contact information for that member. Directly type in the new information to the fields. Click on the save button in the box before clicking Next.

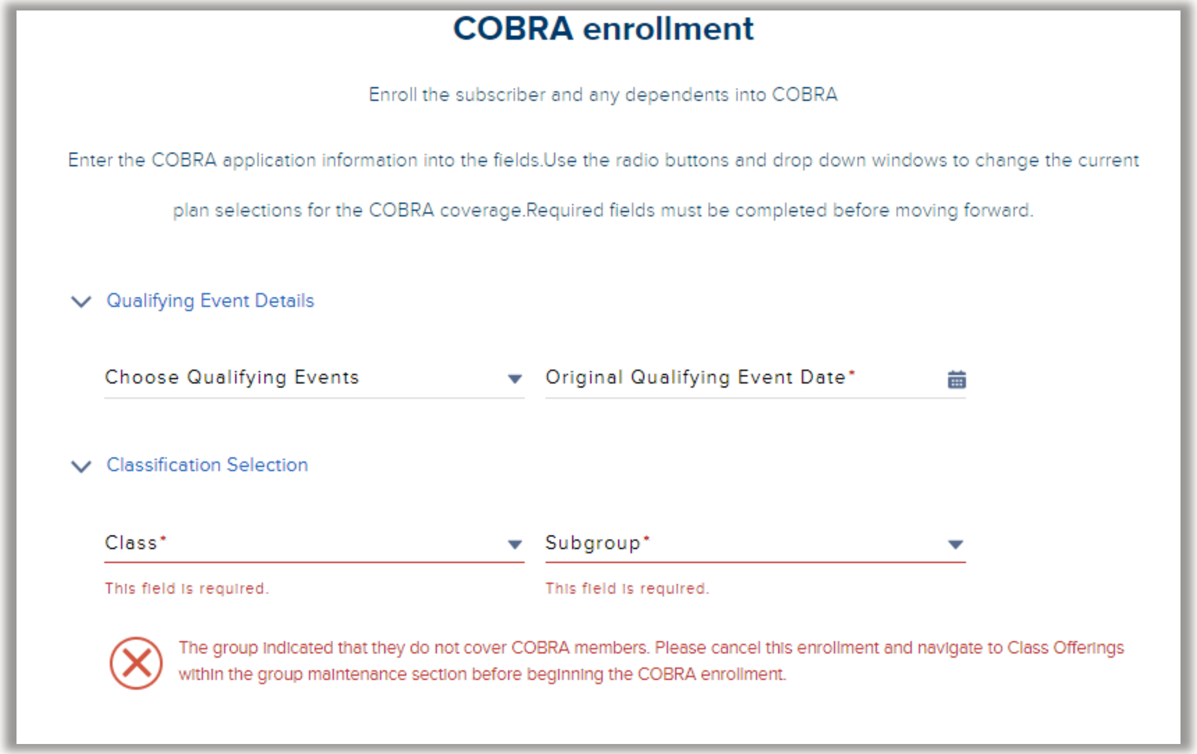
Note the Google address lookup will not include second address line and needs to be added manually.



Federal COBRA enrollment

Use for – Enroll an existing subscriber in COBRA.

How – Select the qualifying event, class, and subgroup information. The tool will give the option for plan changes, but this is not a required step.

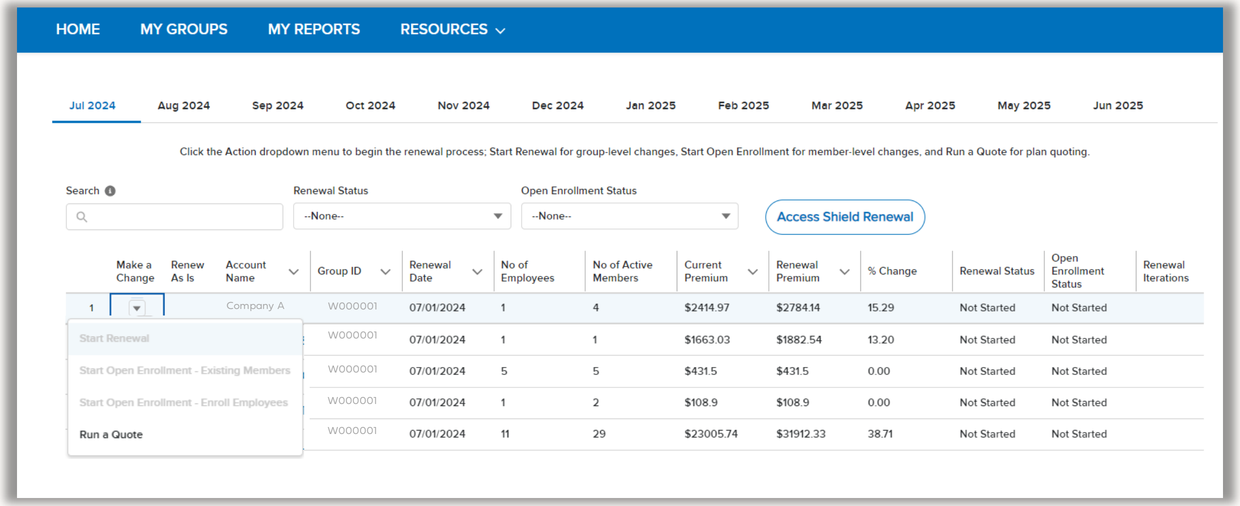


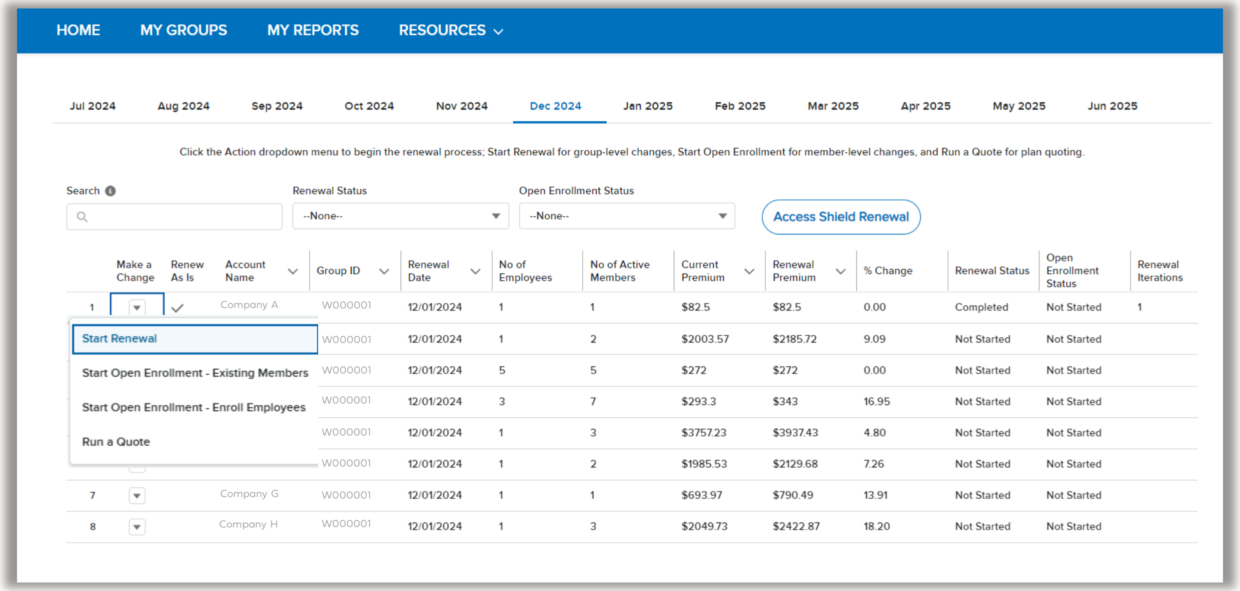
Renewal

Navigate the dashboard

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

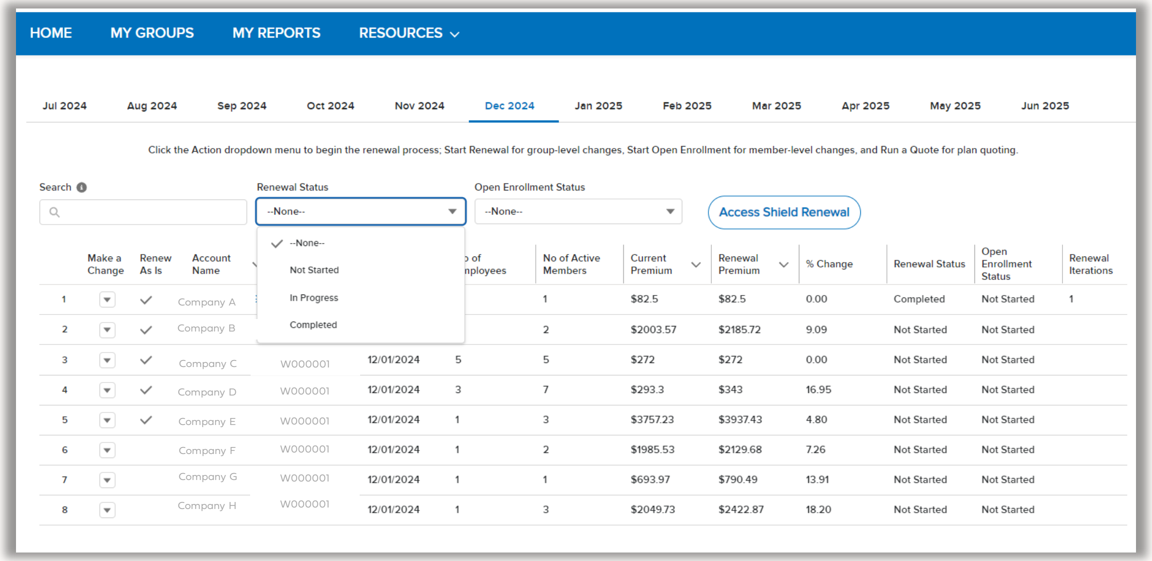
- You will see all groups across the dashboard tabs, but only active renewal months will have the ability to make changes
- Groups are listed in alphabetical order under each renewal month tab
- 10 groups are listed in the table. Months with more than 10 groups have pages available to click through the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

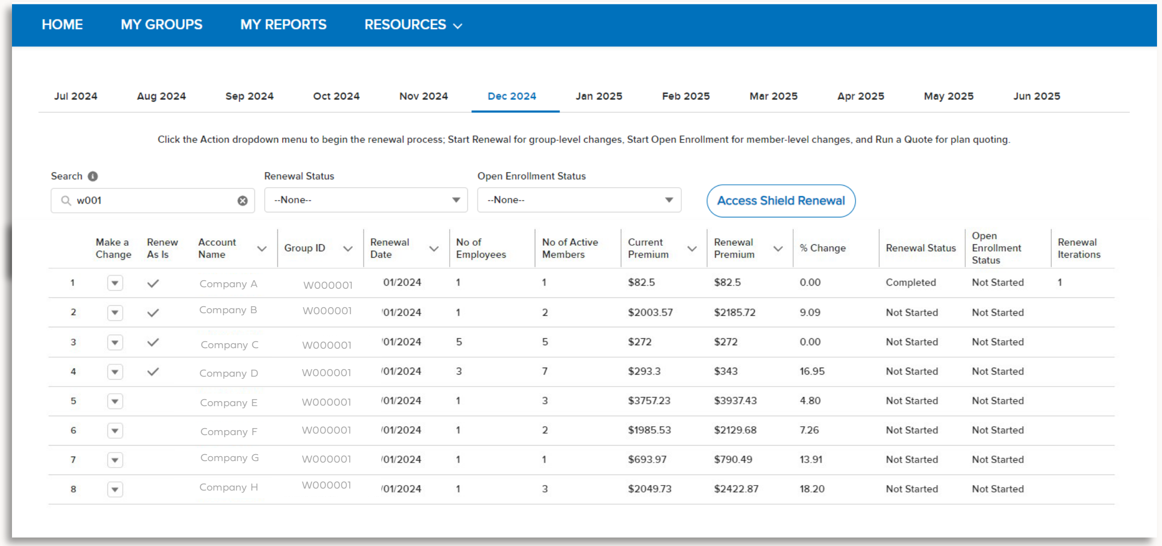




Navigate the dashboard

- 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





Leverage the dashboard

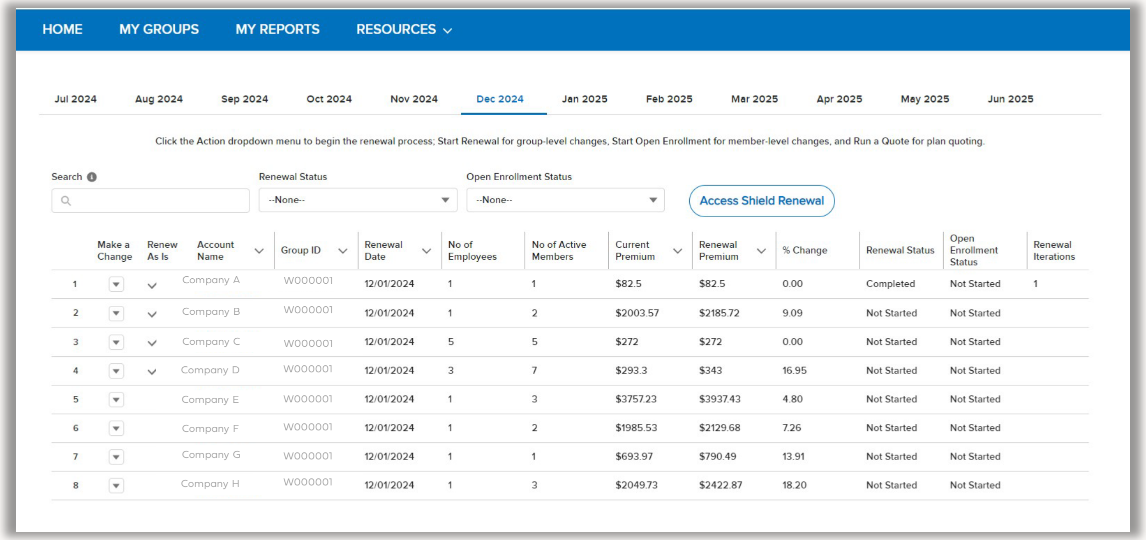
Leverage the renewal dashboard as your own book of business tracker with the renew as is, renewal status, and open enrollment status columns.

Managing passive renewal clients

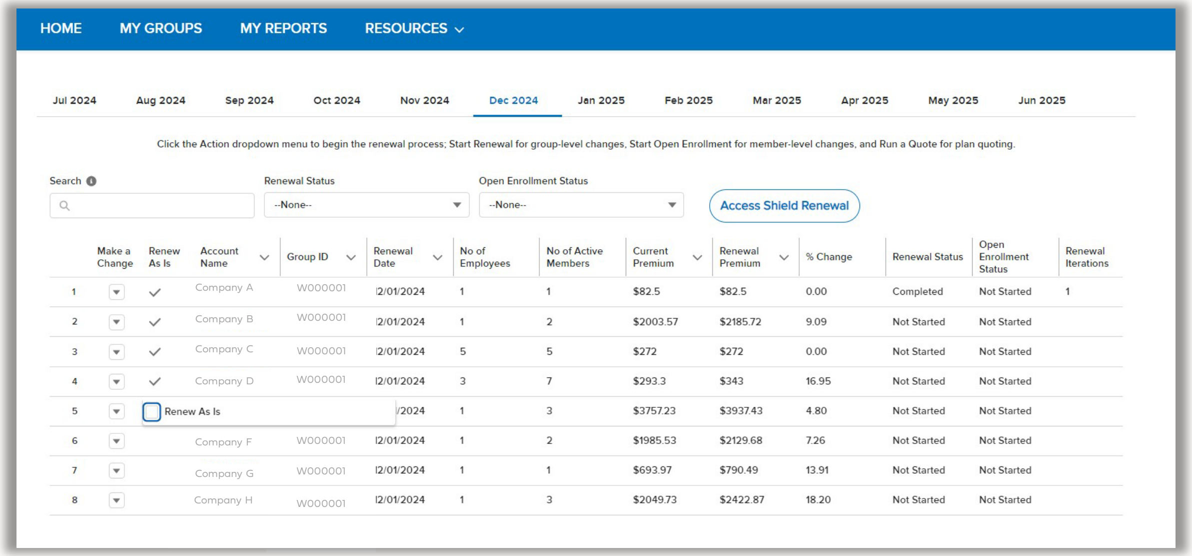
- A simple check mark next to the group name lets you know which groups are renewing as is – without changes – this renewal period.

How

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



	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	



	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		Renew As Is			/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	

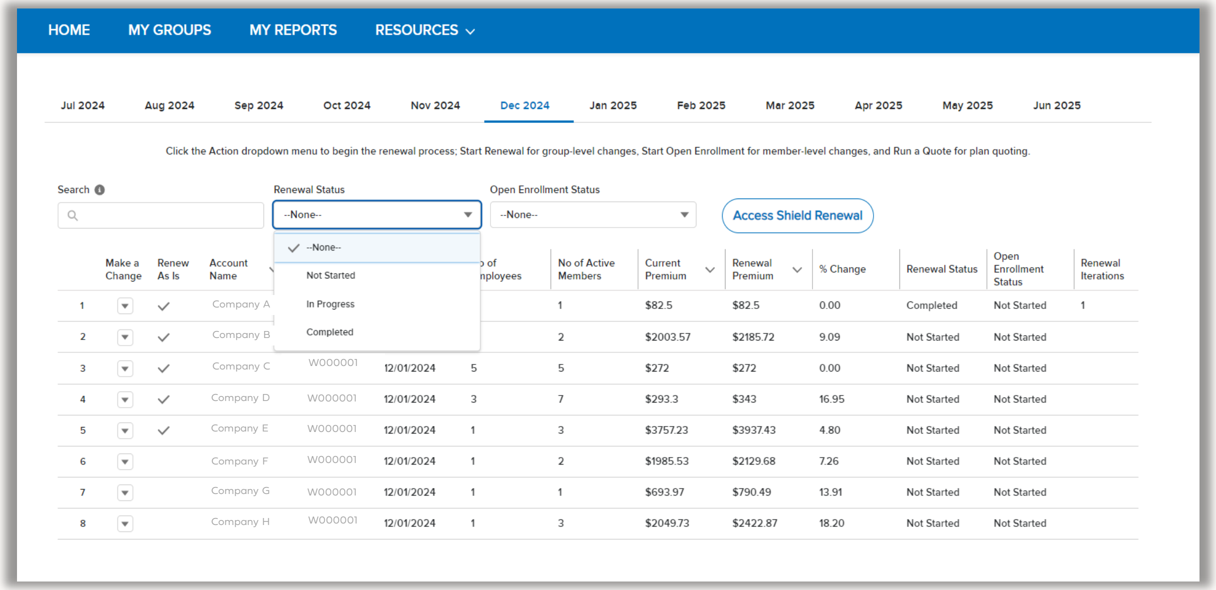
Leverage the dashboard

Managing active renewal clients

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

How:

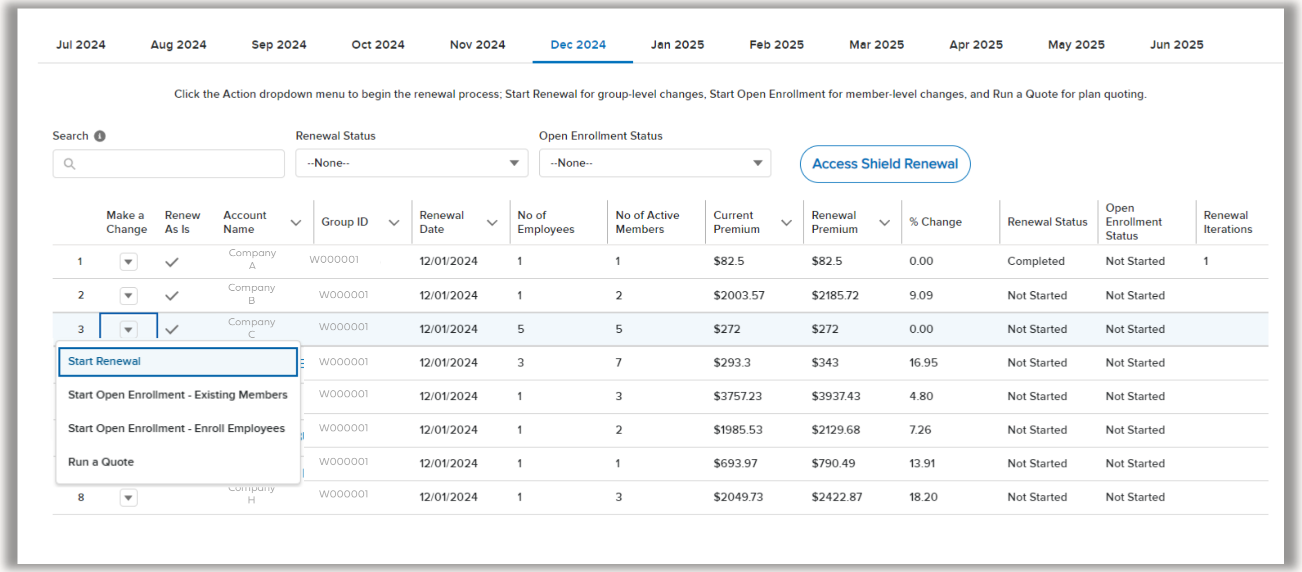
- The status will automatically update in real time as your submissions are installed.



Submit group-level renewal changes

Navigate to group-level changes

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



Submission tips

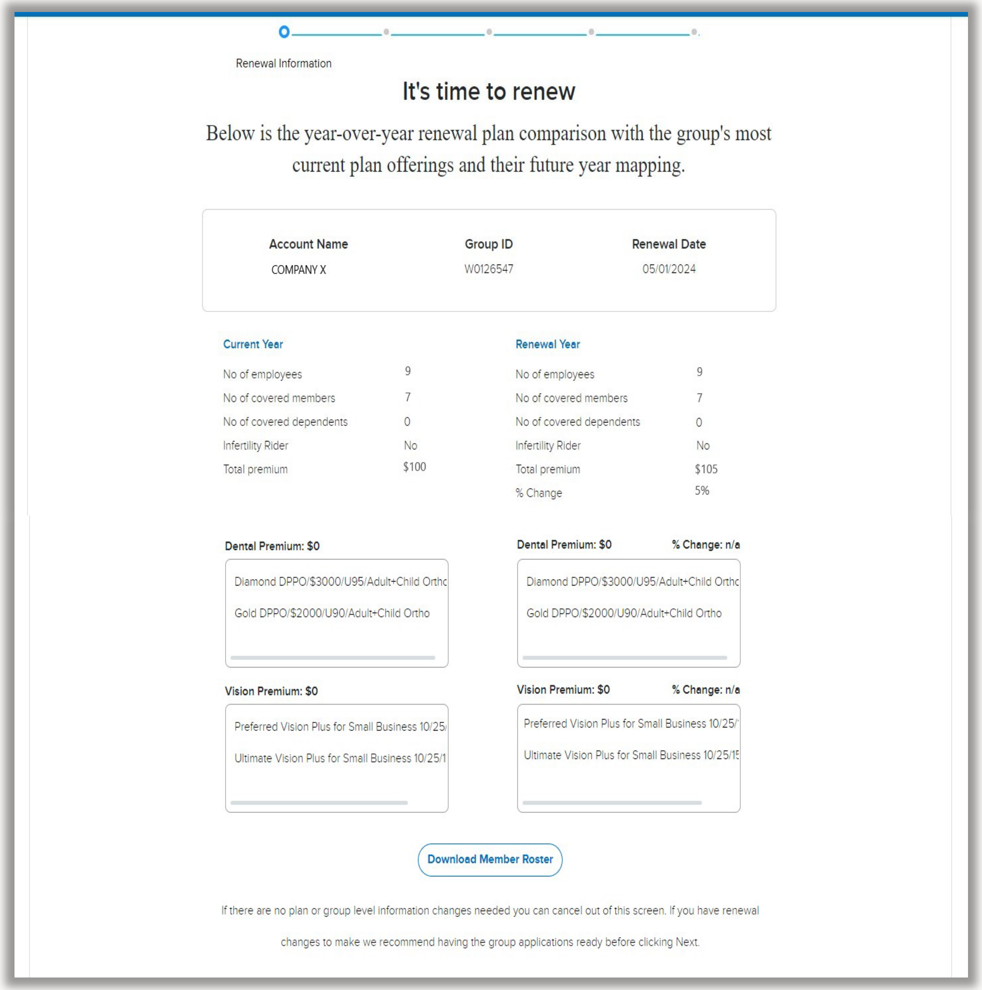
- Some specialty plan changes require you to cancel and add in the same transaction. Move the plan into the cancel plan box before adding the new plan
- You can submit just group-level changes or group and member changes from this workflow

View real-time renewals

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

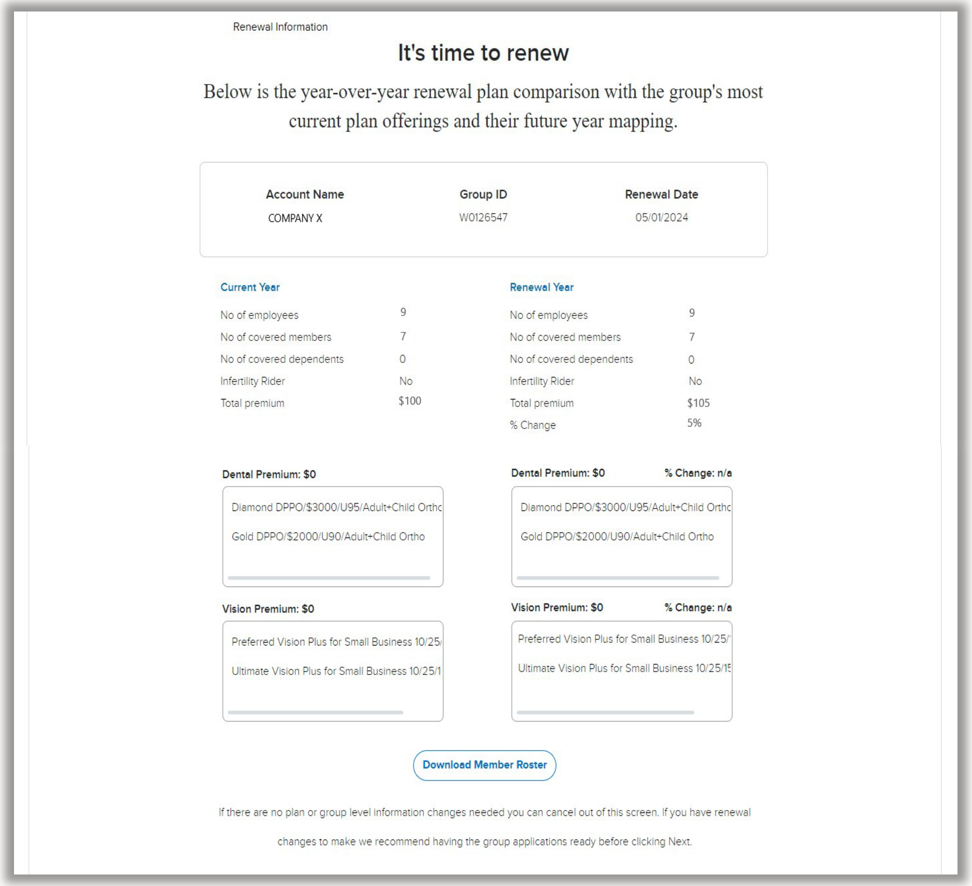
This information is updated real time as changes occurring in EET or other channels are submitted and processed by Blue Shield.

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



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

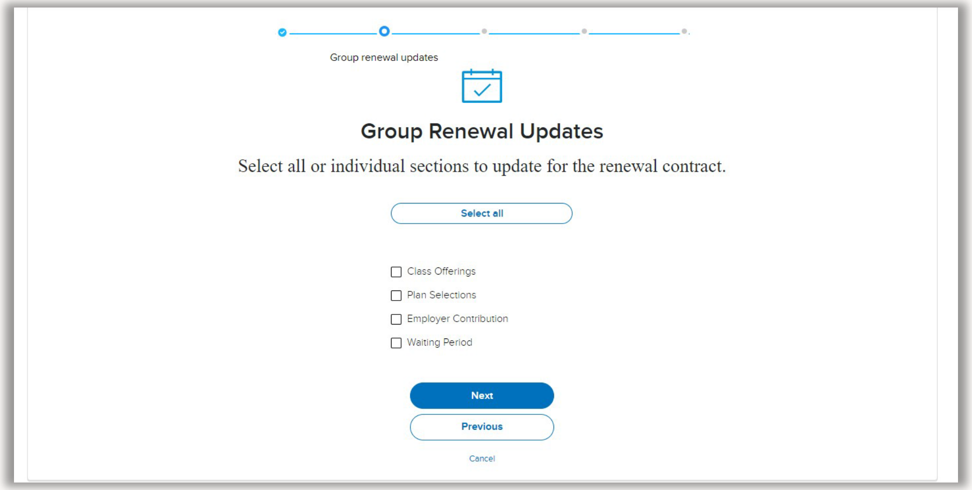


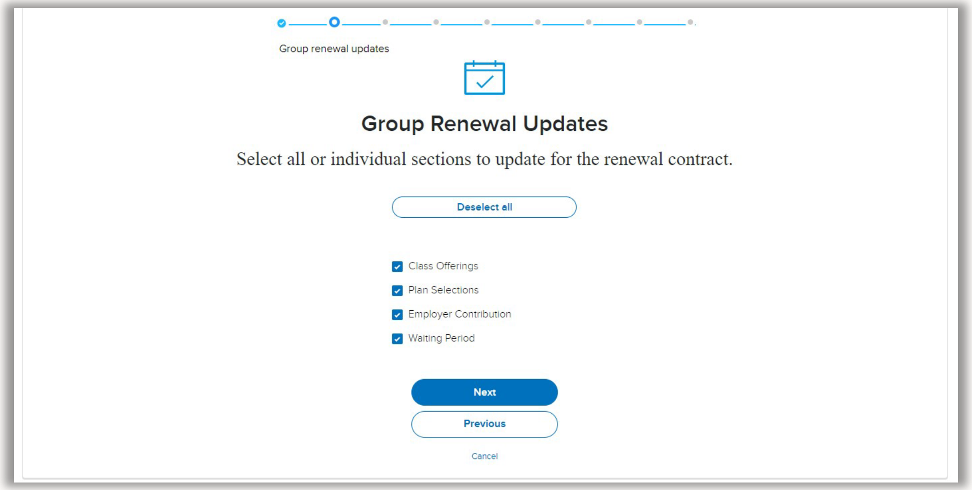
Renewal - select the changes

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.

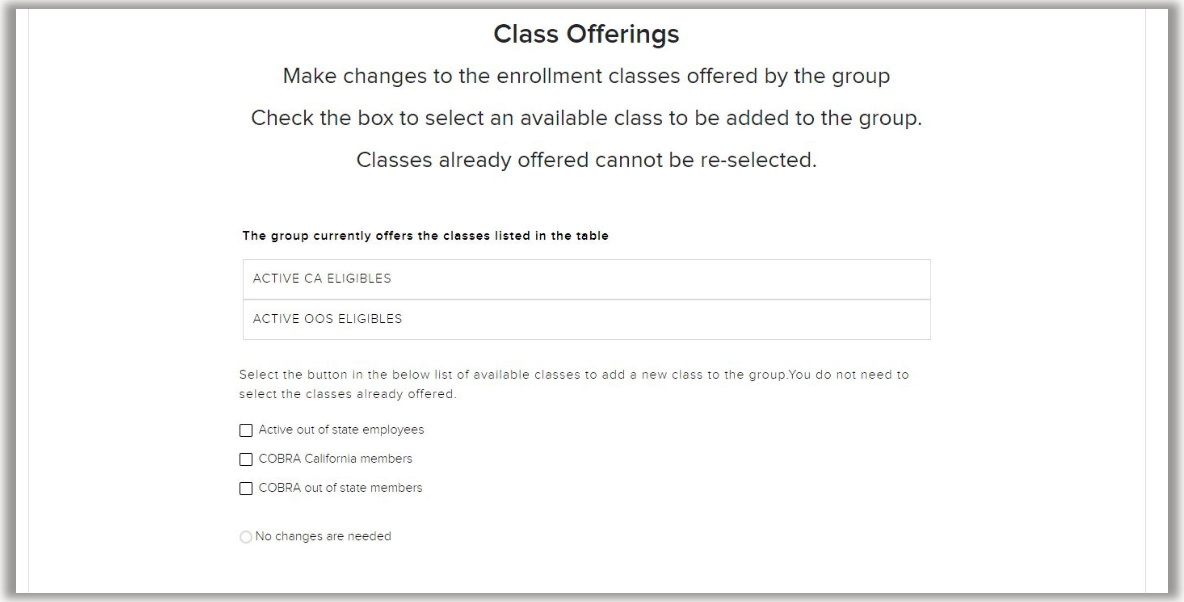
If you select a change and realize you don't need to make a change, use the No Changes are Needed button to proceed to the next step.





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



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

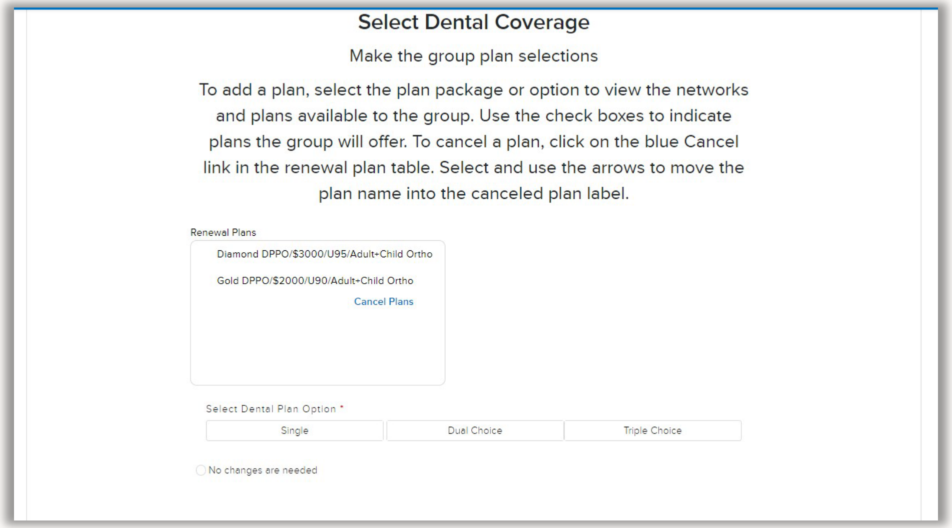
Plans Adds

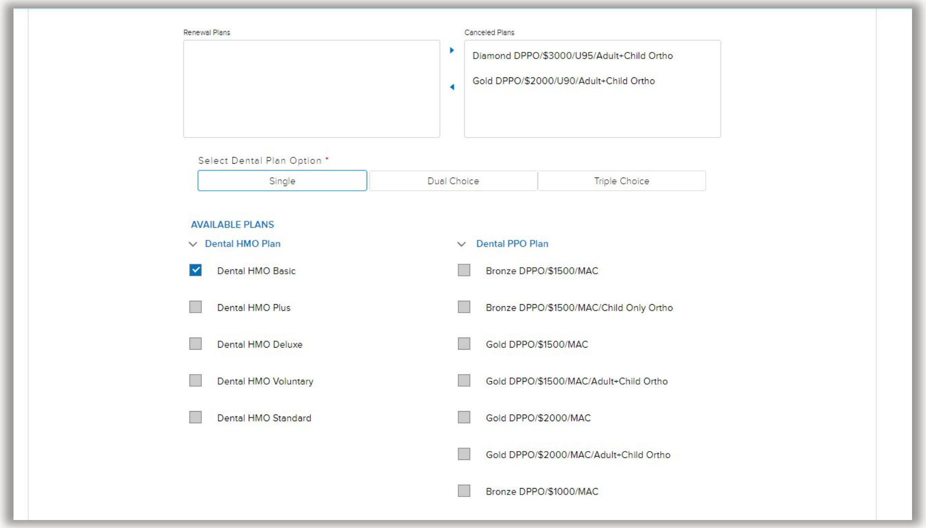
  - Select the plan package and available network to view plans
  - Check the boxes next to the plan name to add them to the group offerings

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

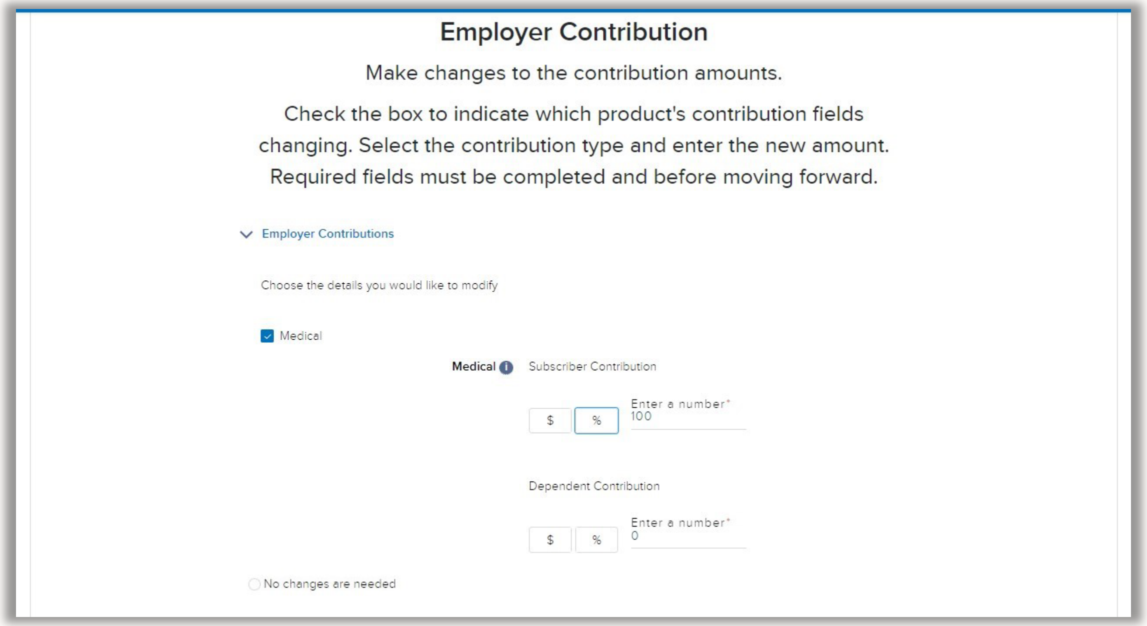
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.





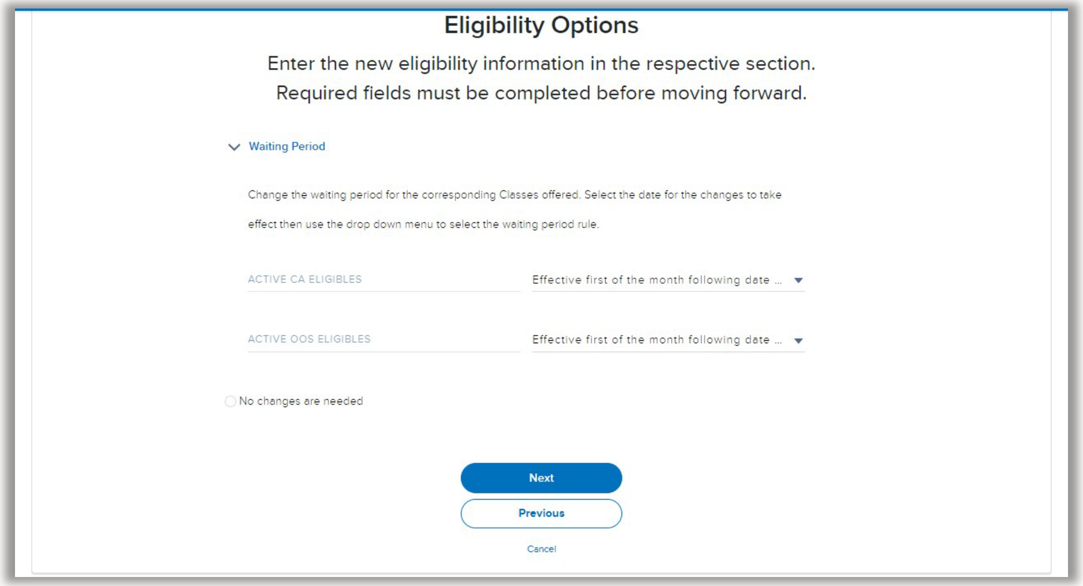
Renewal - contribution

- 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.



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.



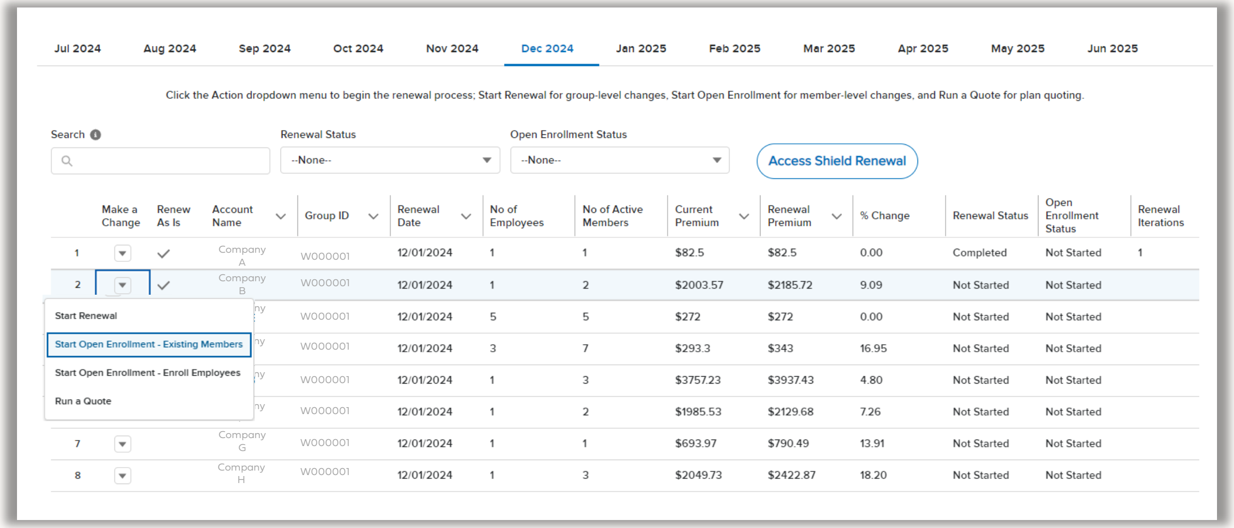
Start Open Enrollment from dashboard

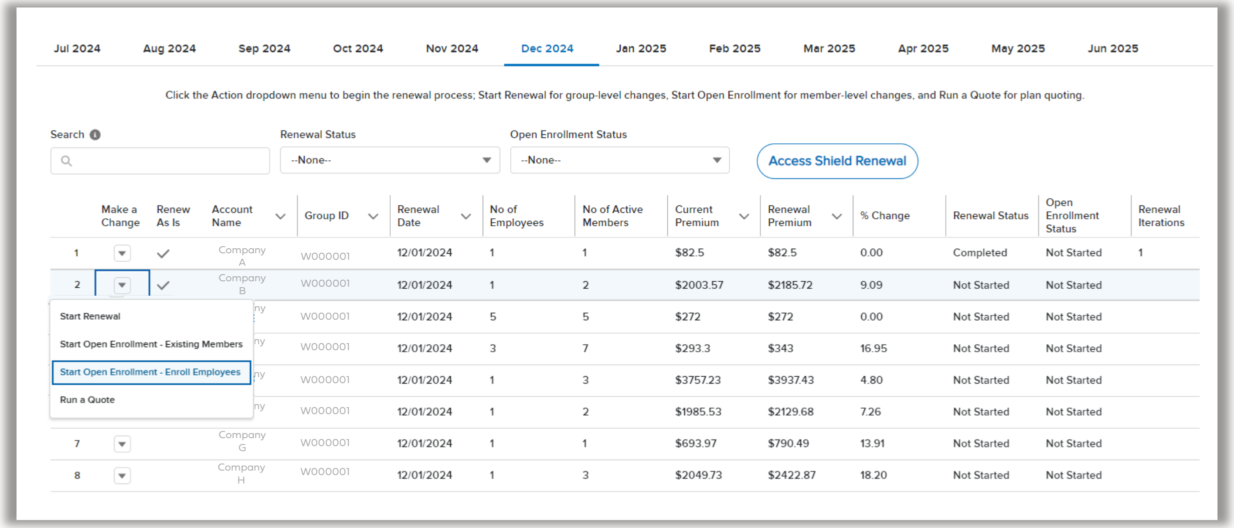
Navigate to member-level changes when not combining with group-level submission

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

Submission tips

- Open enrollment offers two different flows for your member level needs
    - Open enrollment – existing employees let's you change plan elections and terminate employees from the policy
    - Open enrollment – enroll employees let's you bulk enroll employees to the policy
- Use the maintenance workflows to update existing member information





View real-time renewals

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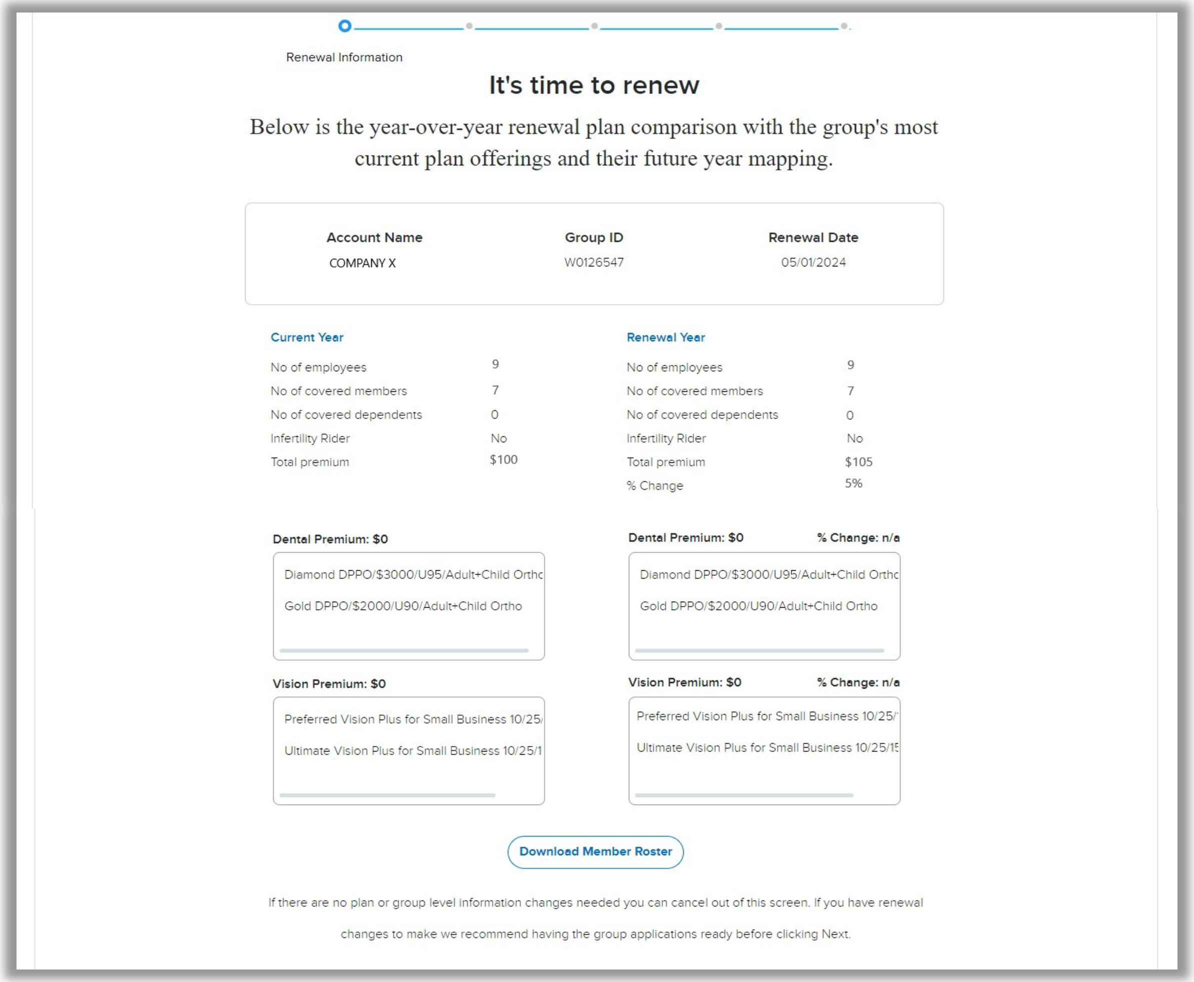

Open Enrollment existing employees - select the changes

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.

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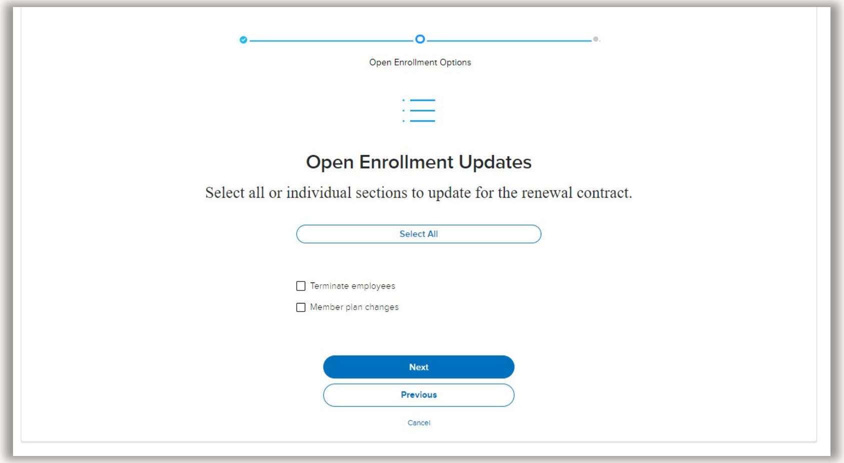
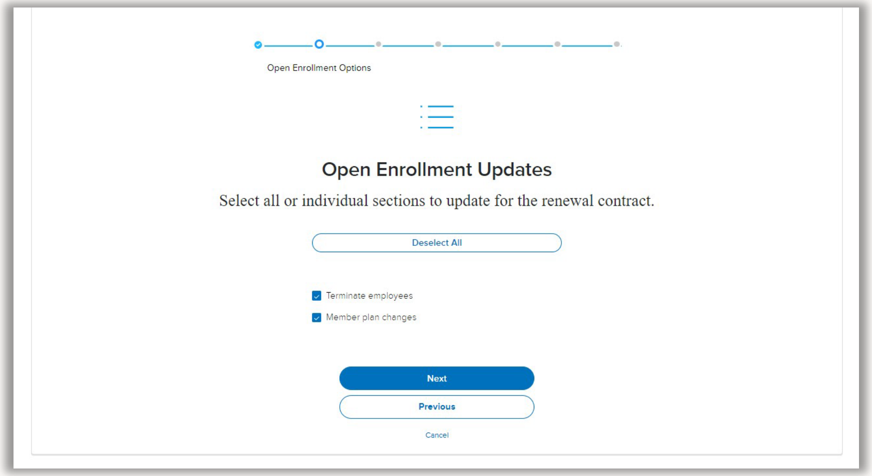
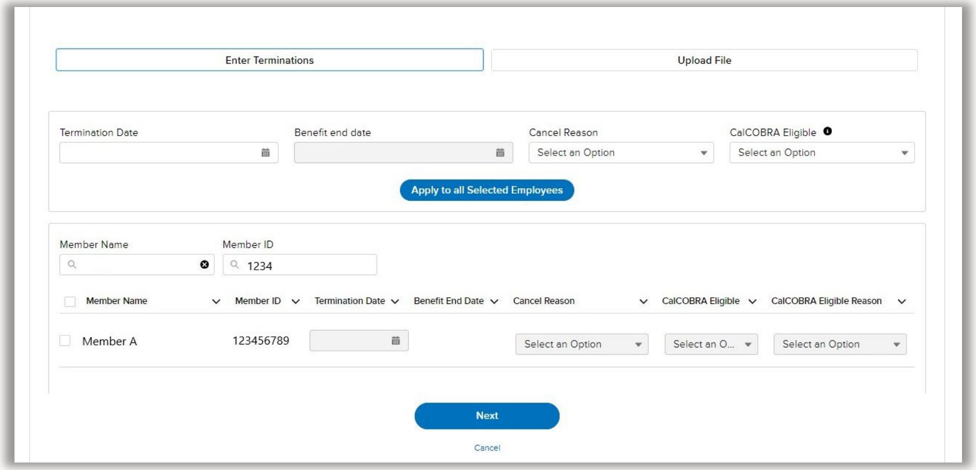
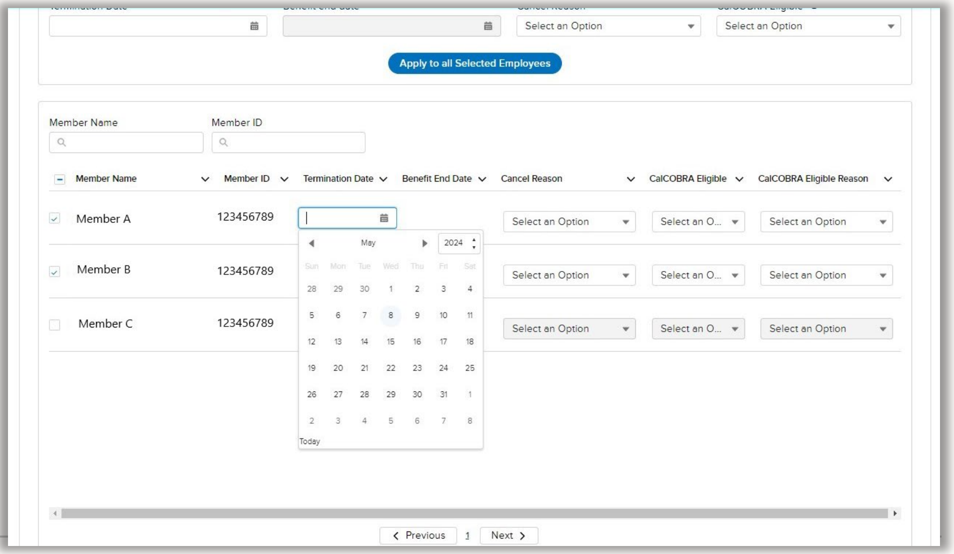




Open Enrollment existing employees – bulk cancelations

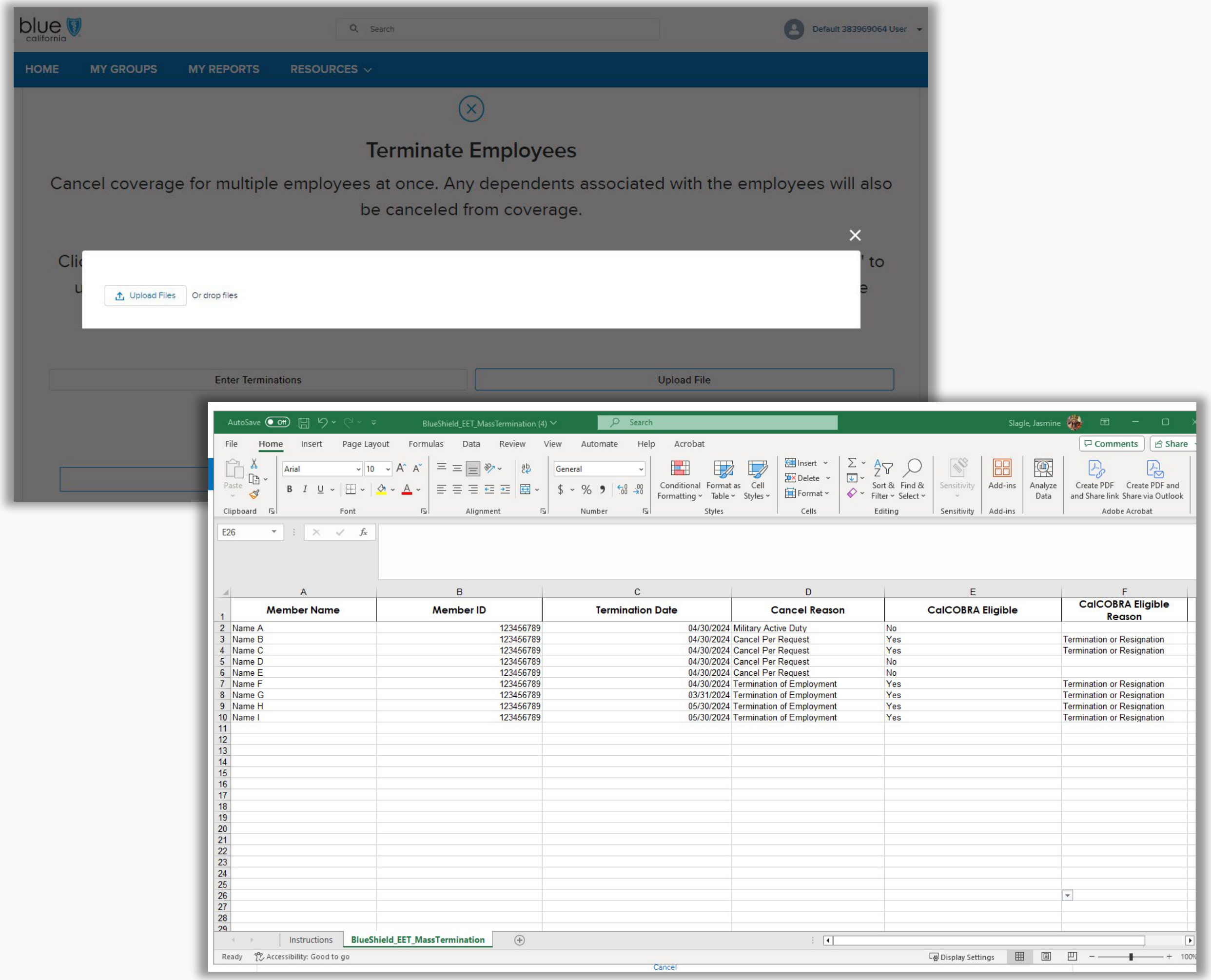
- Use the toggle button to select Enter Terminations
- Select the members and enter their cancelation details in the table
- Use the check box next to the member's name to select them for cancelation.
  - For larger rosters, use the name or ID search to quickly find and select members
- Next, provide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





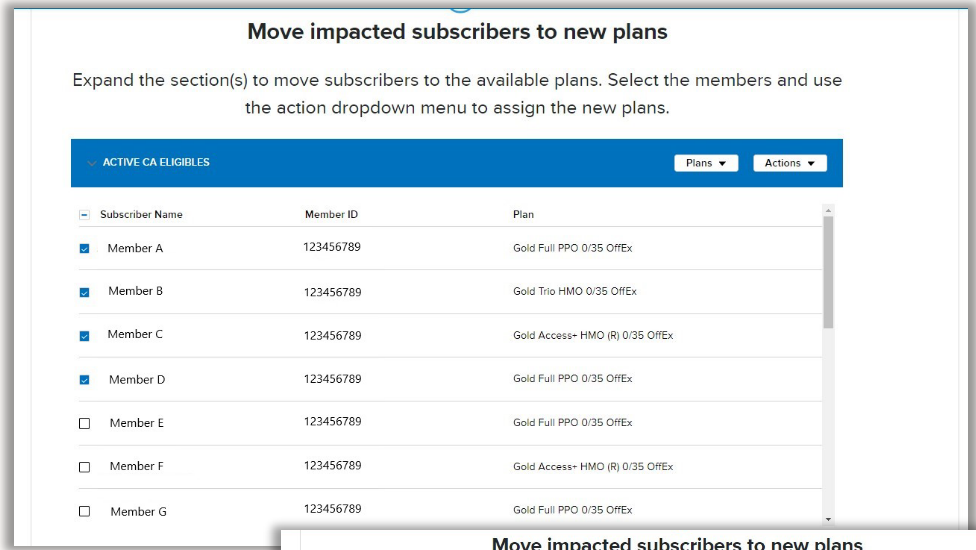
Open Enrollment existing employees – bulk cancelations

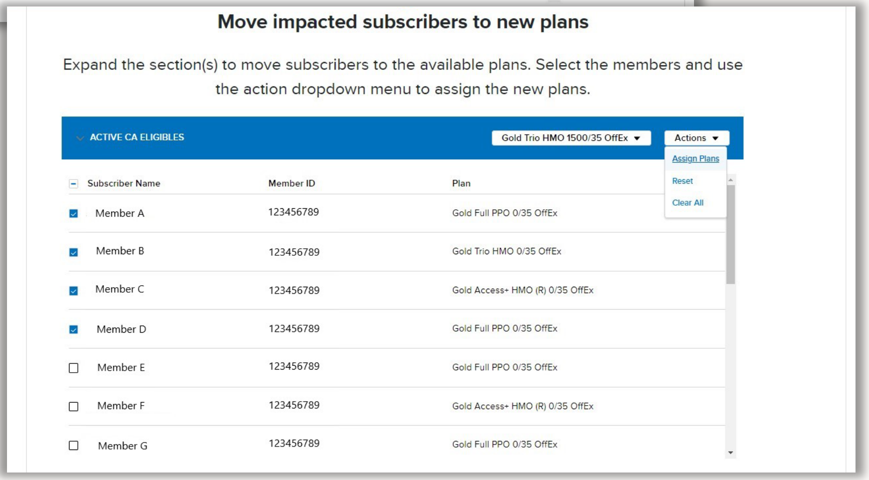
- Use the toggle button to select Upload File
- Click on the Download template link
- Read the template instructions tab before filling in information
- Provide the member name, cancel date, and reason into the corresponding columns
- If eligible, enter in the CalCOBRA notification columns
    - Yes 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



Open Enrollment existing employees – bulk plan changes

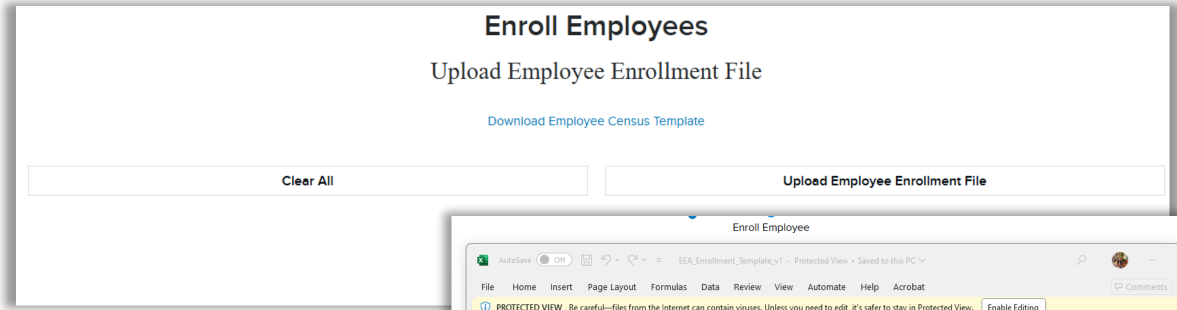
- Expand the class sections to view the full subscriber roster for the respective class plan
- Check the box by the member or members' name to make their plan assignment
    - If multiple subscribers are moving to the same plan, check the boxes next to all names
- Click on the Plan menu and select an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

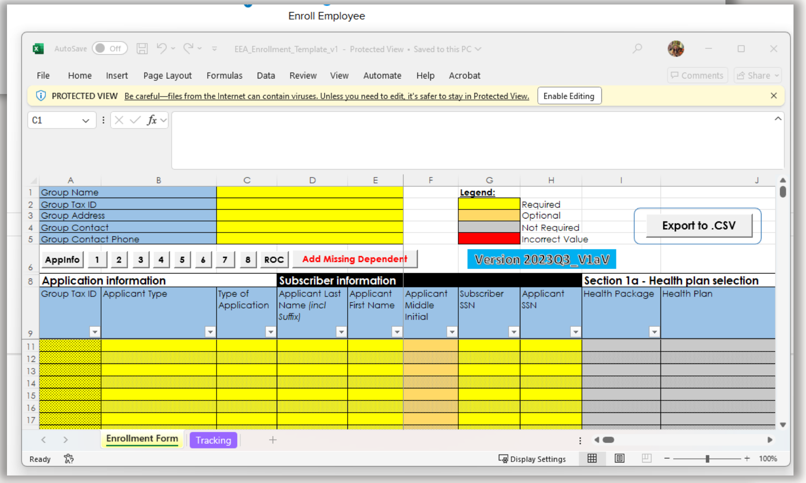


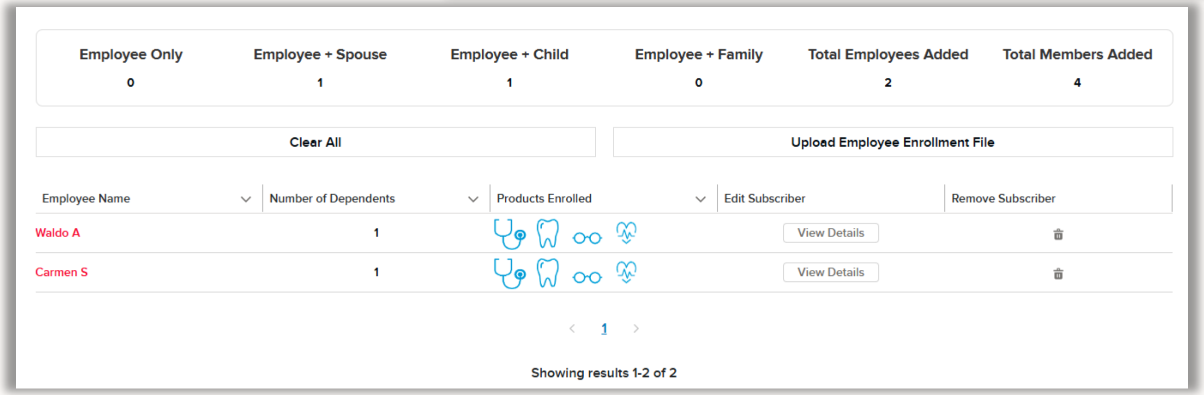


Open Enrollment enroll employees – bulk enrollment

- Click on the Download template link if you do not already have the Employee Enrollment Application spreadsheet
- Read the template instructions tab before filling in information
- Provide the new enrolling member information in the appropriate columns
    - Note PCP and PCD fields take the ID number
- 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
- See how to edit and adjust the enrollment file on the next step

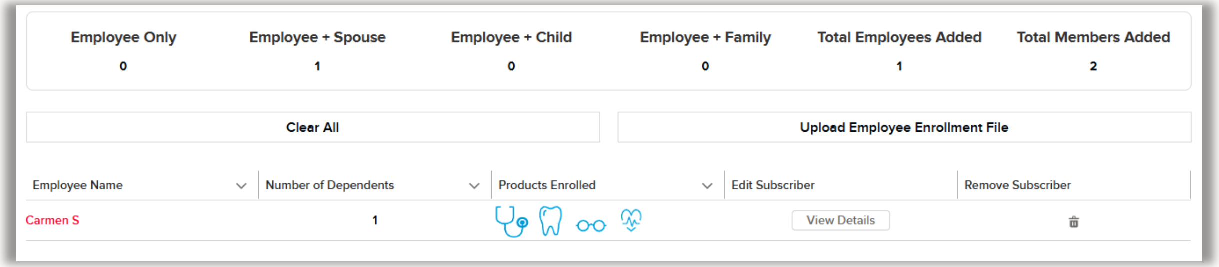


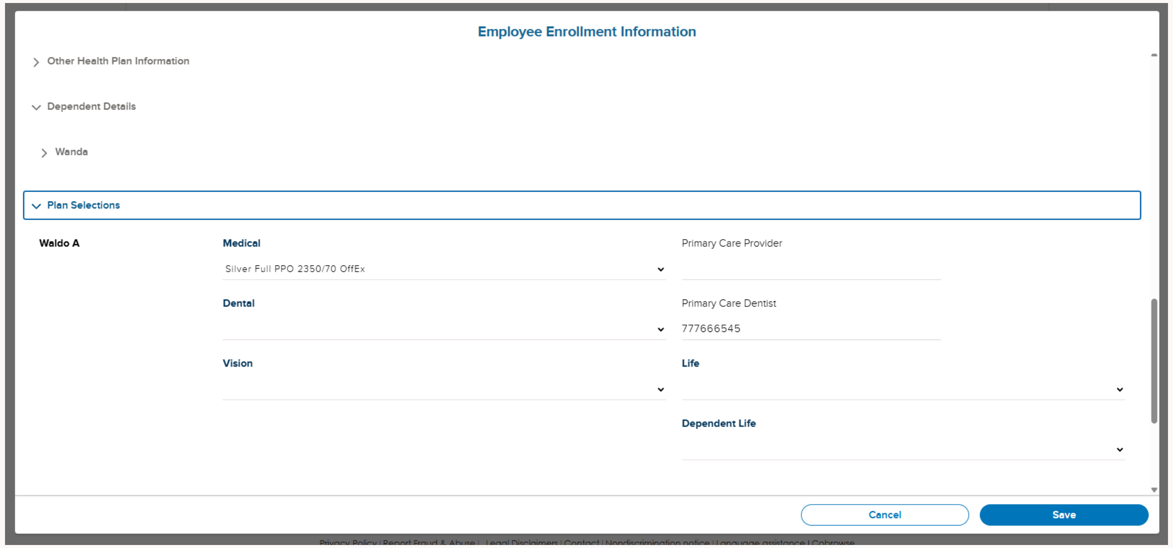




Open Enrollment enroll employees – bulk enrollment

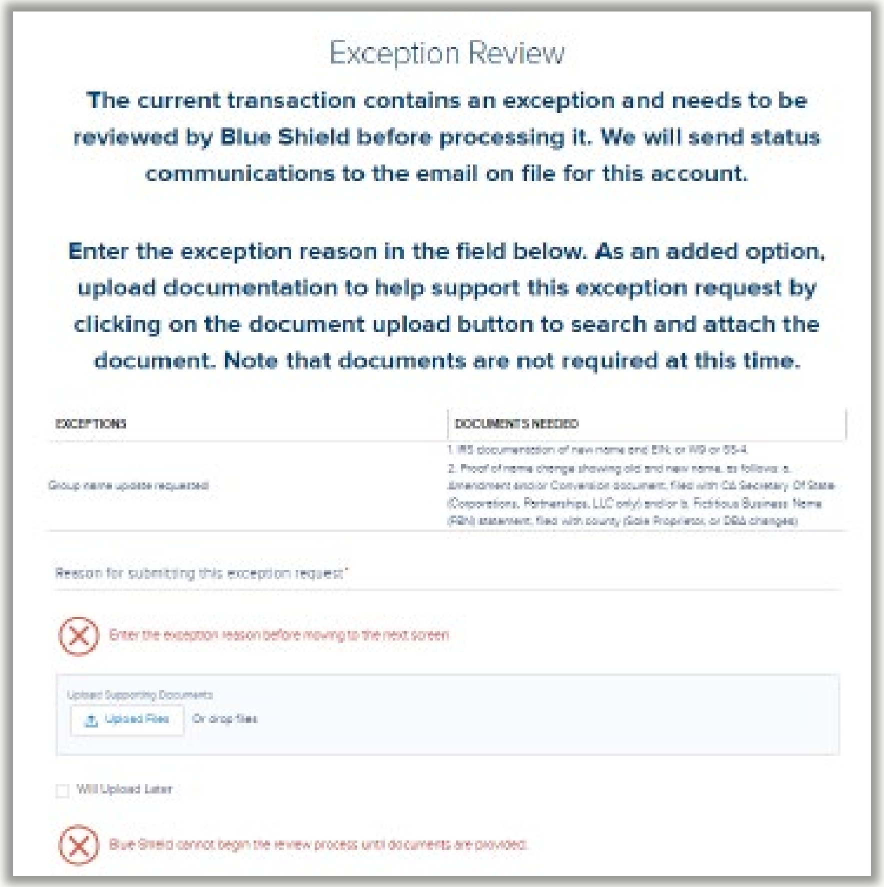
- To edit or adjust a member’s information, click on the “View Details” button
- A modal window will open displaying the enrollment application information provided in the file upload for the subscriber and any dependents
- Scroll through the modal window to adjust information
- To remove a member from the current transaction, click on the trash can icon under the Remove Subscriber column
- You cannot add additional members to the current transaction after uploading the file
    - Submit the current enrollment transaction and return to the Open Enrollment enroll employees flow to submit the missing members





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.



Upload documents for exceptions

Some submissions fall under an exception and needs to be reviewed by
a Blue Shield team.
The tool will prompt users during the submission if there is an exception.
The screen will display what was captured and if any supplemental
documents are needed and what those documents are.

Users can upload the requested documents on this screen:

1. Click upload document
2. Select the document from your files
3. Enter an exception comment
4. Click next to submit the transaction with documents

Users can check a box to upload documents later:

1. Check the box will upload later and submit the transaction without
documents
2. System generated emails will remind you to upload documents s o
processing can begin
3. To upload a document, navigate to the tool homepage
4. Click view more on the To Do list panel
5. Click on the maintenance documents required link next to the group's
name
6. Click on the blue upload document button in the top right-hand
corner
7. The tool will reload the exception document request screen Click
8. Upload document
9. Select the document
10. Click save

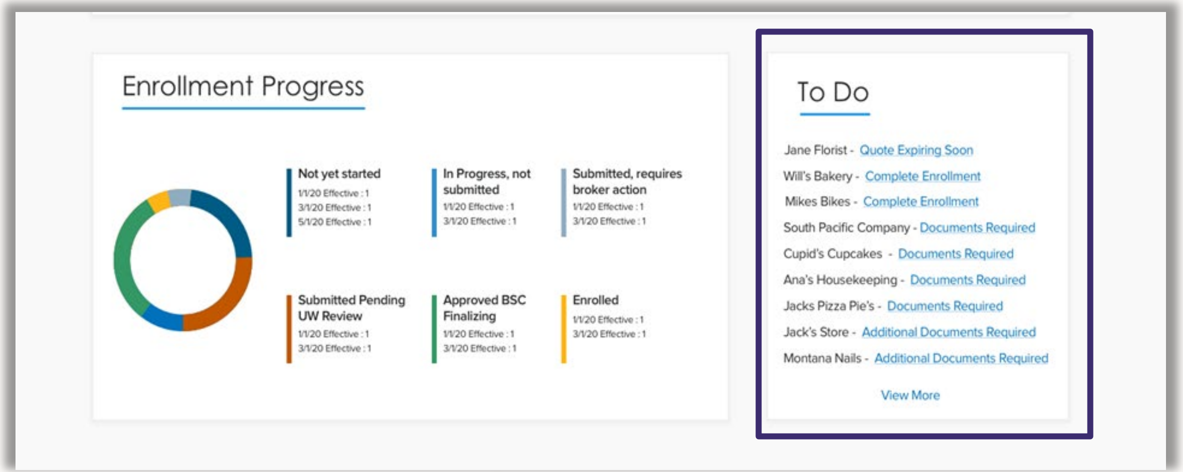
To Do List

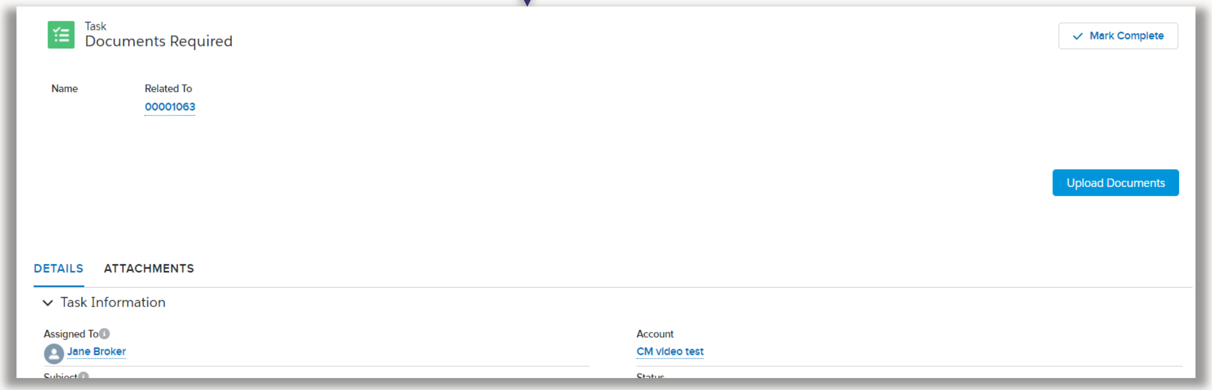
The To Do list, located to the right of the Enrollment Progress section, lists important tasks for the user to complete.

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.





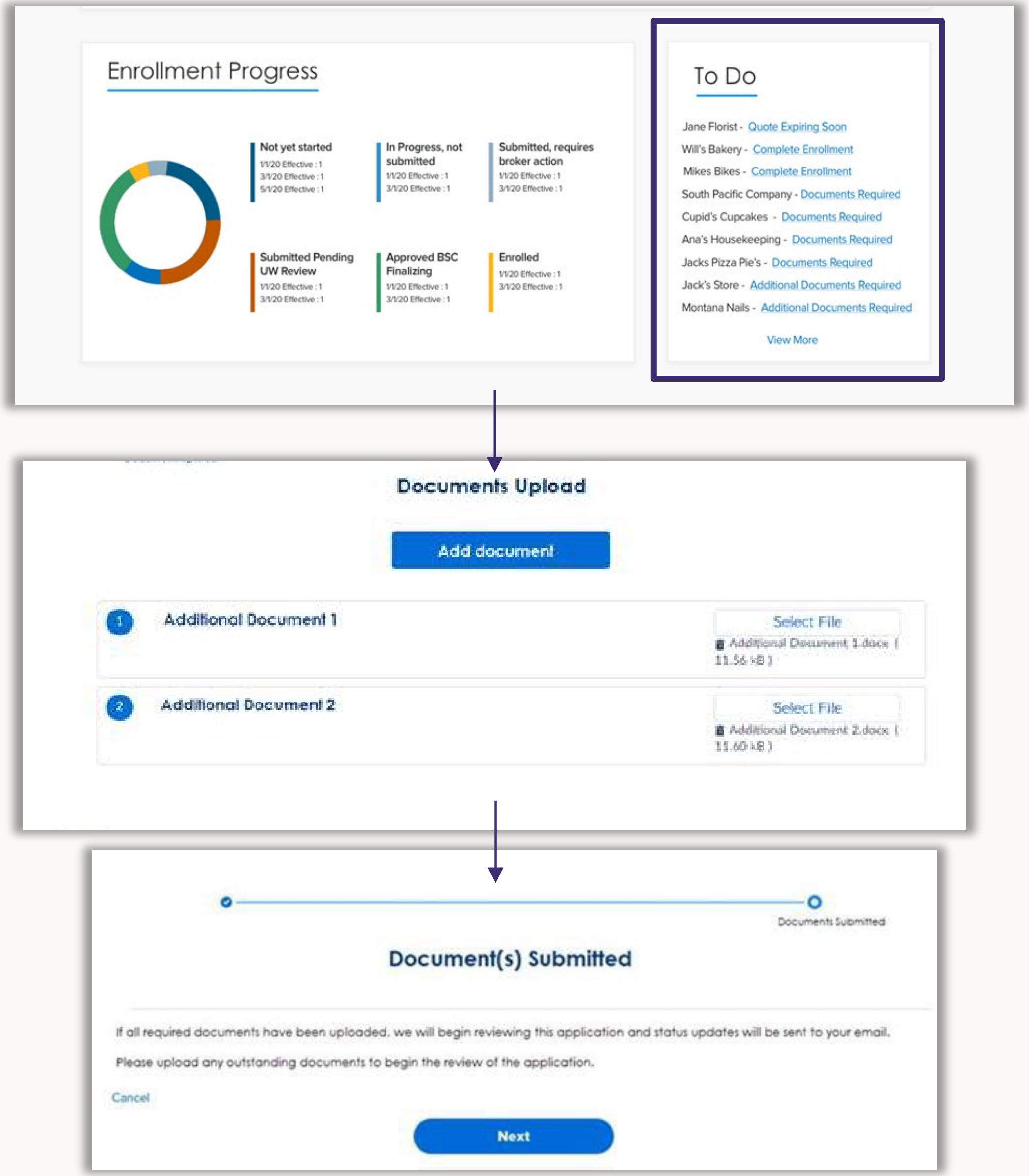
Document upload

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.

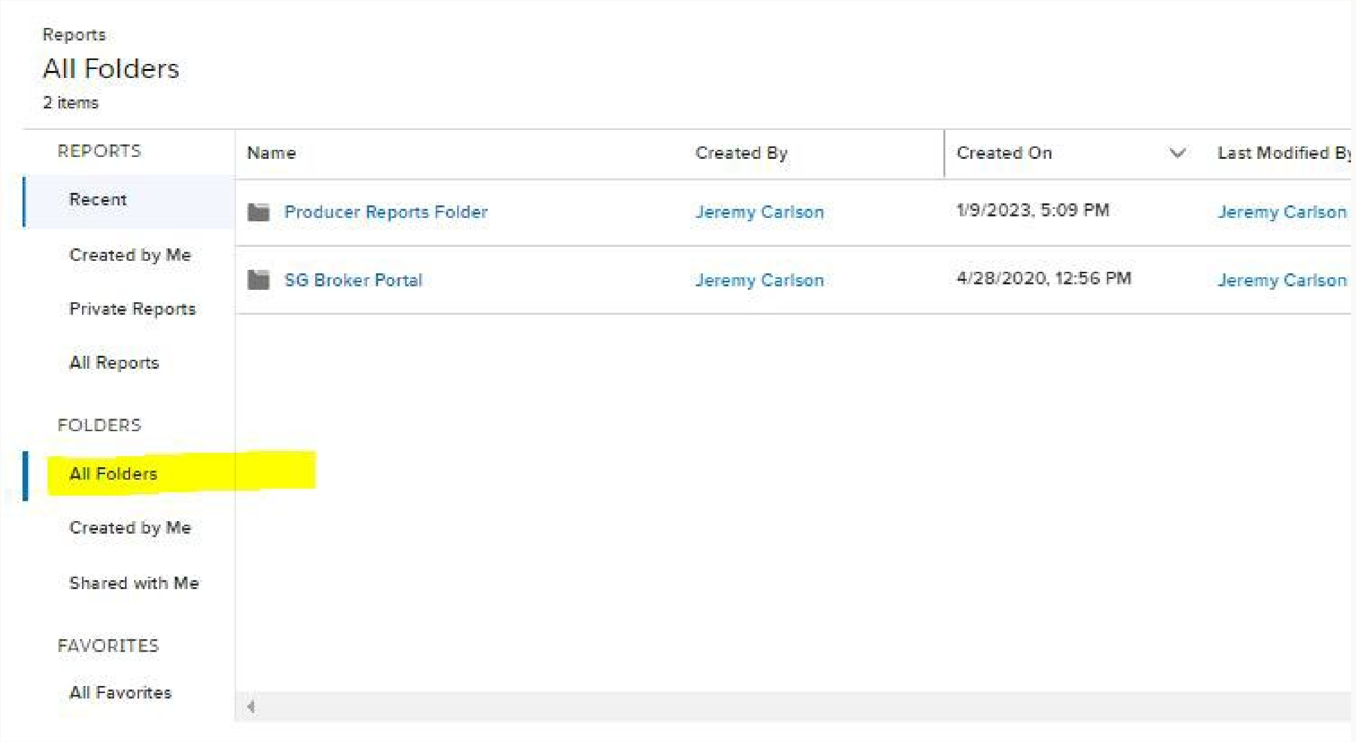
Follow these steps to upload documents to an application after it has been submitted:

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.



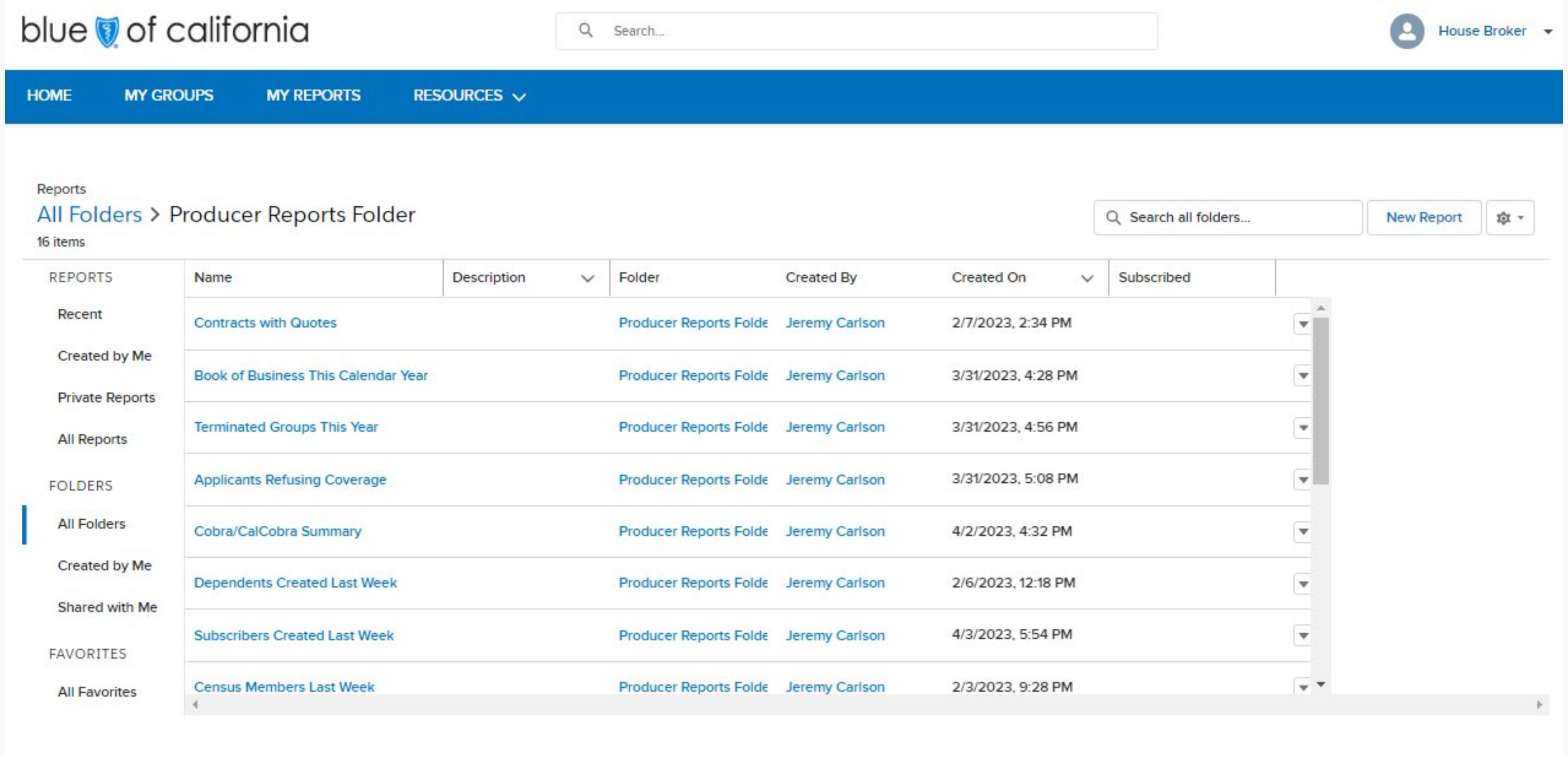
Reports

Report folder



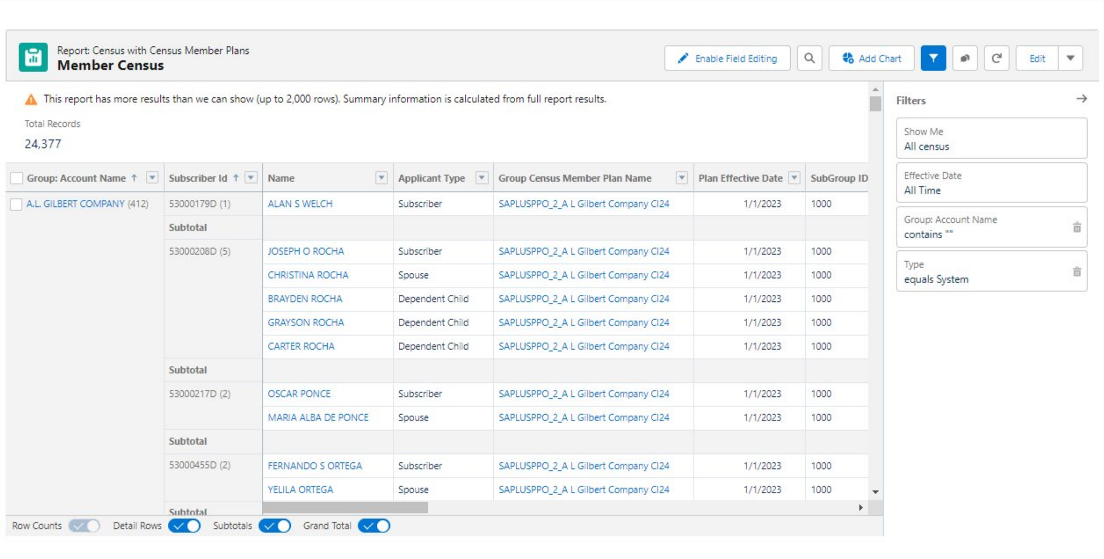
To access reports, click My Reports and then All Folders in the left-hand panel.

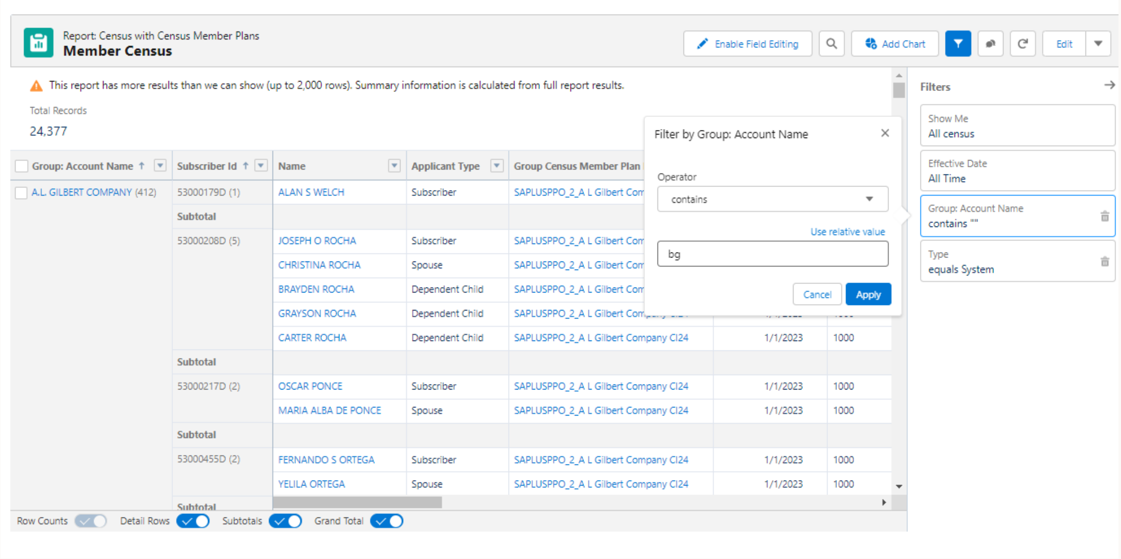
Report folder



Next, select the report from the available list.

Editing reports



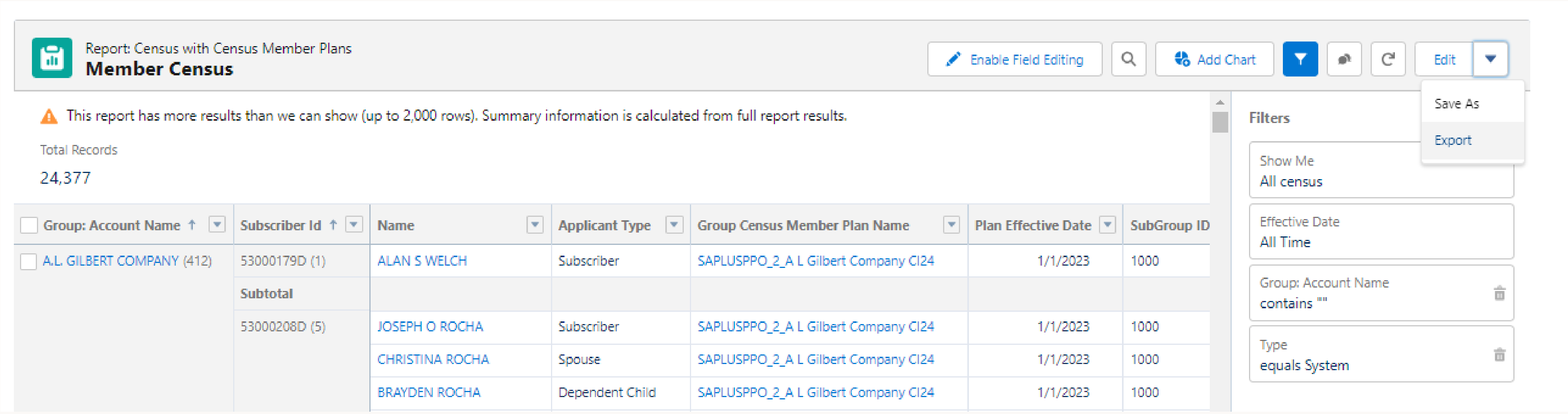


Use the funnel icon to edit the report filters.

To filter for a specific group, click on the Group: Account Name filter and type in the group's name.

To filter a time period, click on Date filter and select the time period.

Export reports



Use the down arrow to export the report into an Excel document.

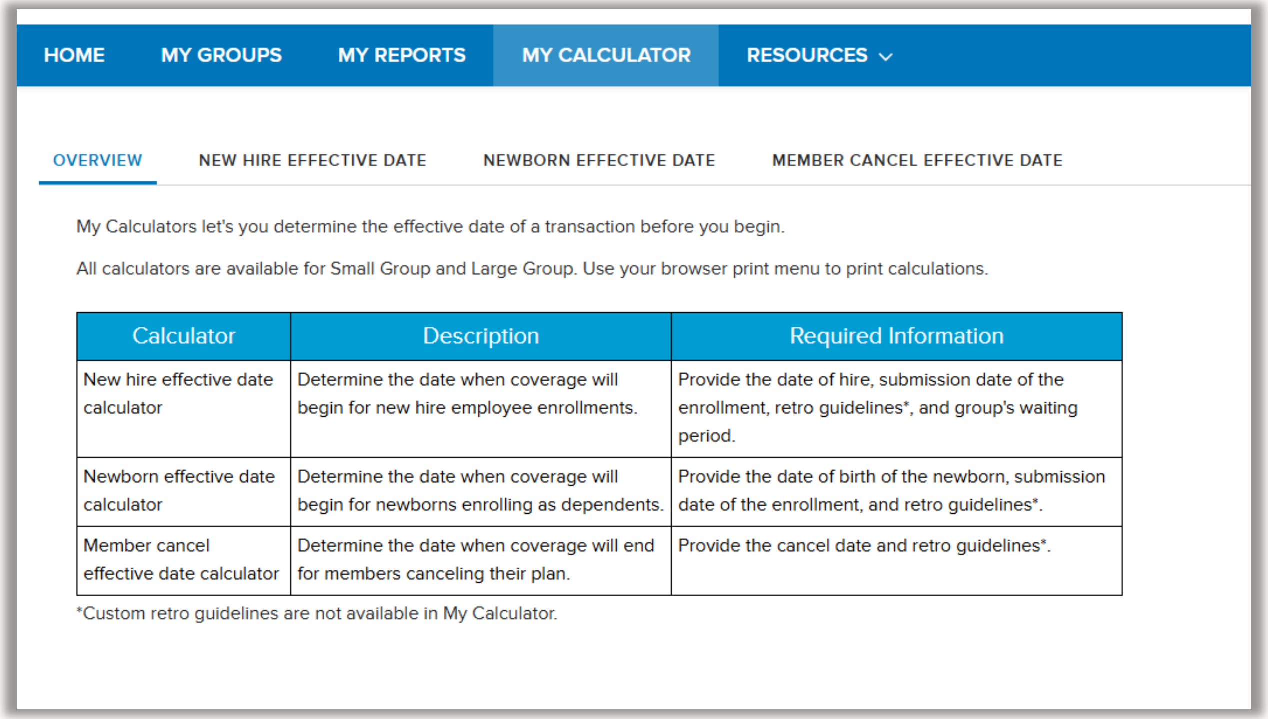
Prior report name	EET report name	Report description
n/a	Contracts with quotes	Enrolled groups with an EET quote
n/a	Book of business this calendar year	Groups enrolled this year
n/a	Terminated groups this calendar year	Groups canceled this year
Benefits refused/ cancellation	Applicants refusing coverage	Roster of refusals of coverage
Benefit summary	Benefit plans	All plans sold throughout your book of business
Group information	Class and waiting period audit report	Group waiting periods for each class offered
COBRA summary	COBRA/Cal COBRA summary	Roster of members enrolled in COBRA or Cal COBRA this year
n/a	Dependents created last week	Roster of new dependents added last week
Hired employees	Subscribers created last week	Roster of new subscribers added last week
n/a	Census members last week	Roster of new members added last week
n/a	My completed maintenances	All complete and installed tool submissions across your book of business
Terminated employees	My group and member cancelations	All cancelation submissions at the group and member levels
Employee census	Member census	Member roster with plan enrollment information
Employee detail report	Member detail report	Member demographic and plan enrollment information
Dependent census	Child dependent census	Child dependent only roster with plan enrollment information
n/a	Aging out dependents	Roster of dependents age 25 + who will age out in your book of business

My Calculator

Located in the top navigation bar, My Calculator offers new hire, newborn, and cancelation effective dates so you and your clients can know and plan effective dates before submitting enrollments.

Tips

- My Calculator can provide effective date insights you previously called Broker Services for support
- Print or save calculations by using the print or print to PDF option in your internet browser
- My Calculator is an optional tool, it is Not required before enrollment submissions
- Instructions and helpful information are included on each calculator tab
- Refer to the latest edition of the Administrative Guide for full details on eligibility and effective dates



My Calculators let's you determine the effective date of a transaction before you begin.

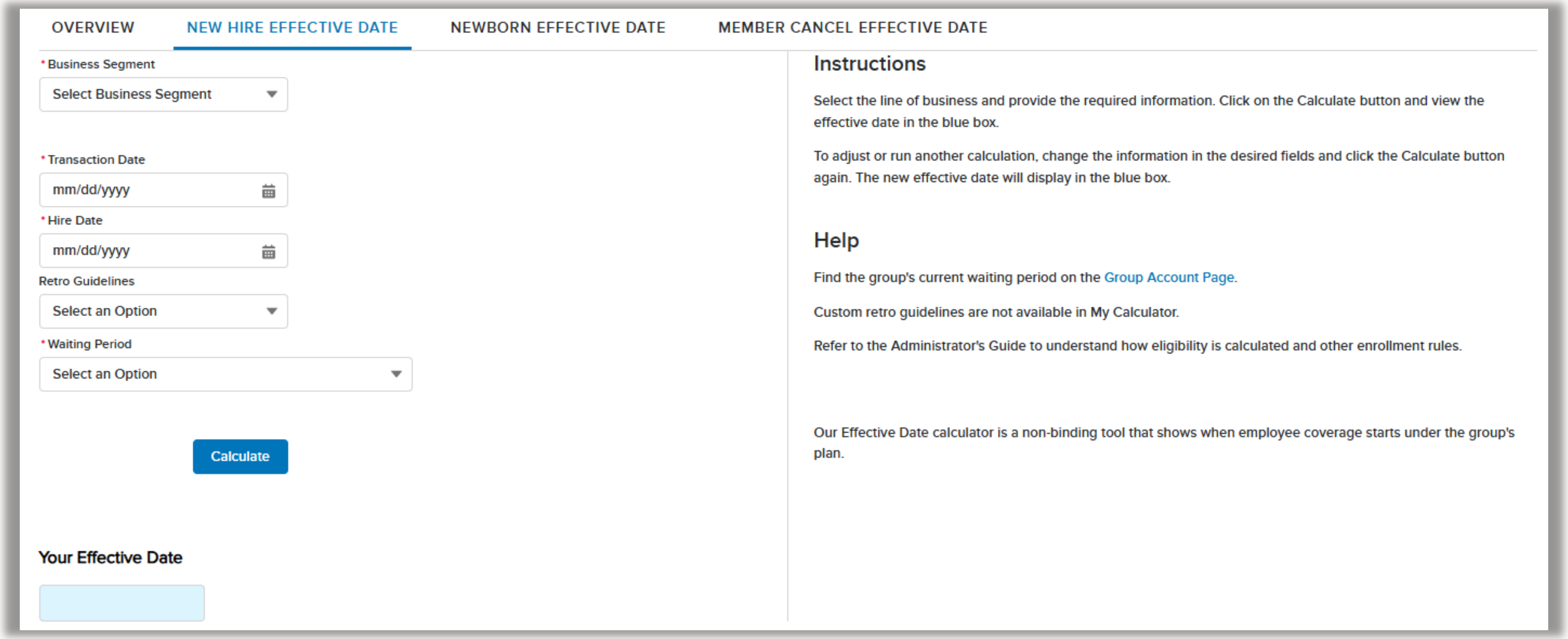
All calculators are available for Small Group and Large Group. Use your browser print menu to print calculations.

Calculator	Description	Required Information
New hire effective date calculator	Determine the date when coverage will begin for new hire employee enrollments.	Provide the date of hire, submission date of the enrollment, retro guidelines*, and group's waiting period.
Newborn effective date calculator	Determine the date when coverage will begin for newborns enrolling as dependents.	Provide the date of birth of the newborn, submission date of the enrollment, and retro guidelines*.
Member cancel effective date calculator	Determine the date when coverage will end for members canceling their plan.	Provide the cancel date and retro guidelines*.

*Custom retro guidelines are not available in My Calculator.

My Calculator

- For all effective date calculators, provide the required information and click Calculate.
- Results will display in the blue Your Effective Date box
- Rerun calculations or start a new inquiry simply by changing the information in the required fields and clicking Calculate.



Information needed for calculations

New Hire
- Business segment
- Transaction date
- Hire date
- Retroactive guidelines
- Waiting Period

Newborn
- Business segment
- Transaction date
- Date of birth
- Retroactive guidelines

Cancel
- Business segment
- Cancel date
- Retroactive guidelines

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