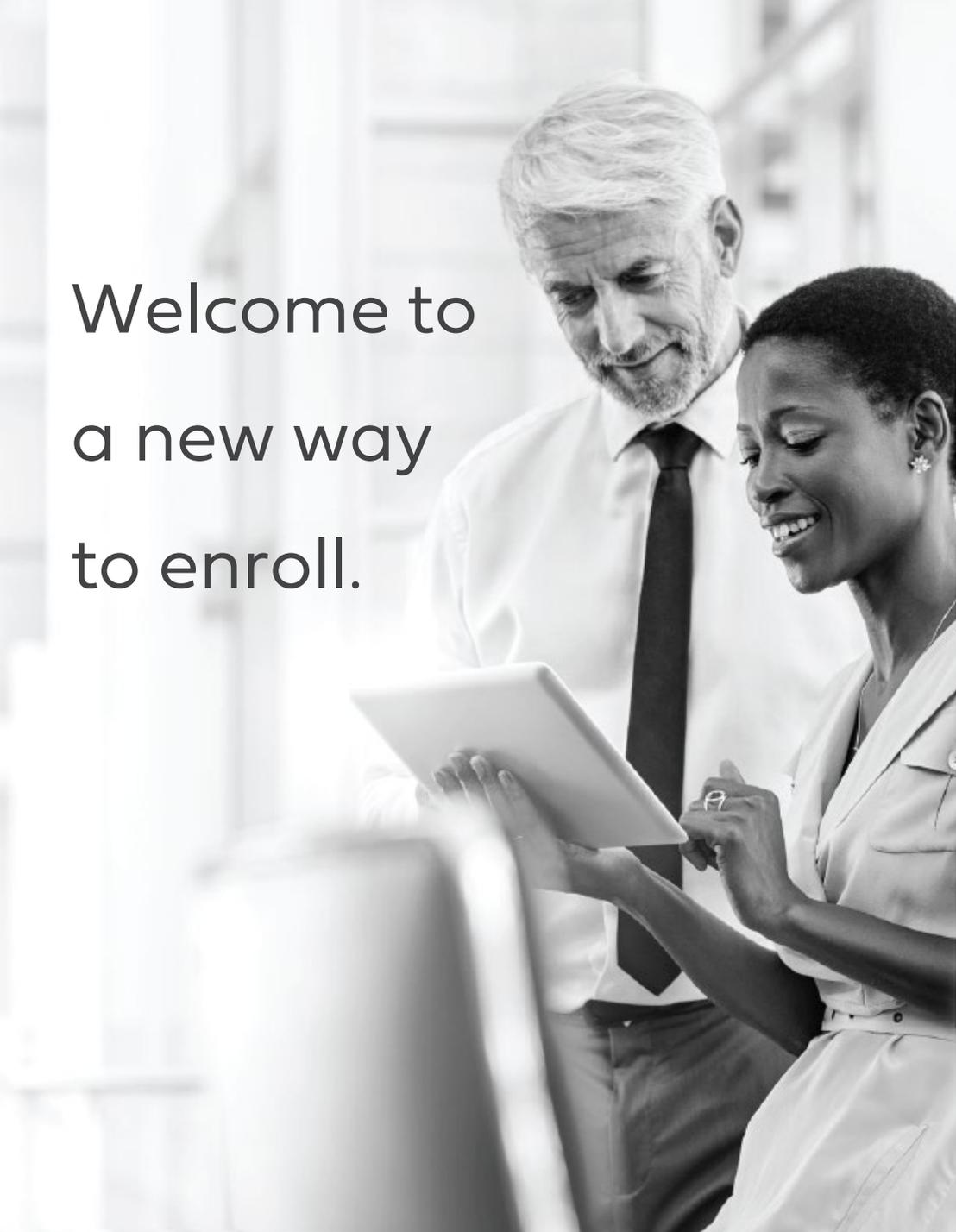


# Employer Enrollment Tool Consolidated tool guide for brokers

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

4	The difference of digital enrollments
6-7	Tool capabilities
8	Video tutorials
9-12	Enrollment and eligibility rules
13	Navigation to EET
16-23	Quoting
25-32	New group enrollment
34-70	Benefits Management
71-92	Renewal
91-95	Exceptions and document upload
96-101	Reports
102-103	My Calculator

# Make enrollment changes with confidence with the Employer Enrollment Tool



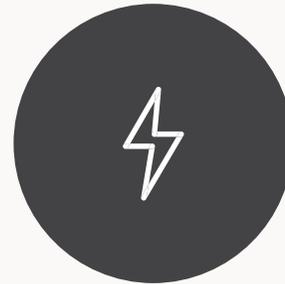
## Real-time installation

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



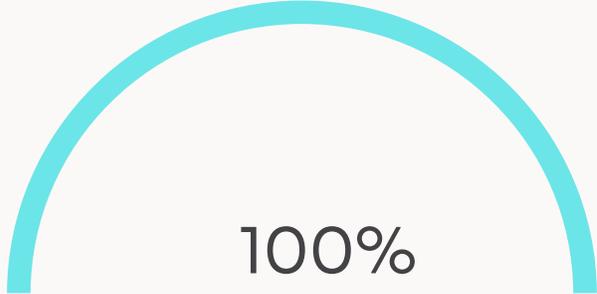
minutes

Features available in  
one tool



\* Large Group employers will have fewer features

Tool submissions with  
self-service status  
tracking



# 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 Cancellations 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	
	Update Address	SBM, LG, P	
	Update Phone	SBM, LG, P	
Member Contact and Classification	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 pending 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 nor its employees or dependents have committed fraud or misrepresentation;
- It maintains the required 51% of its employees (full-time and full-time equivalent) in California;
- It continues to meet participation and contribution requirements; and
- It has otherwise maintained small group eligibility

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

## Key renewal eligibility dates to know



Renewals are available 120 days before the anniversary date



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



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



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

# 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

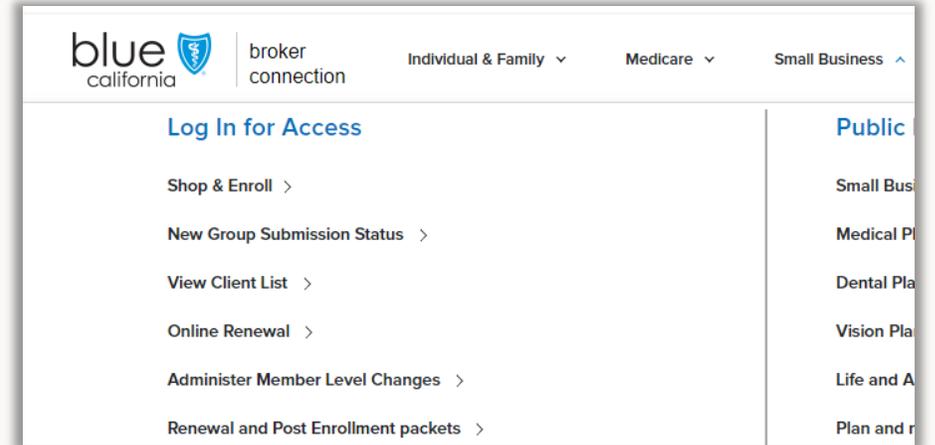
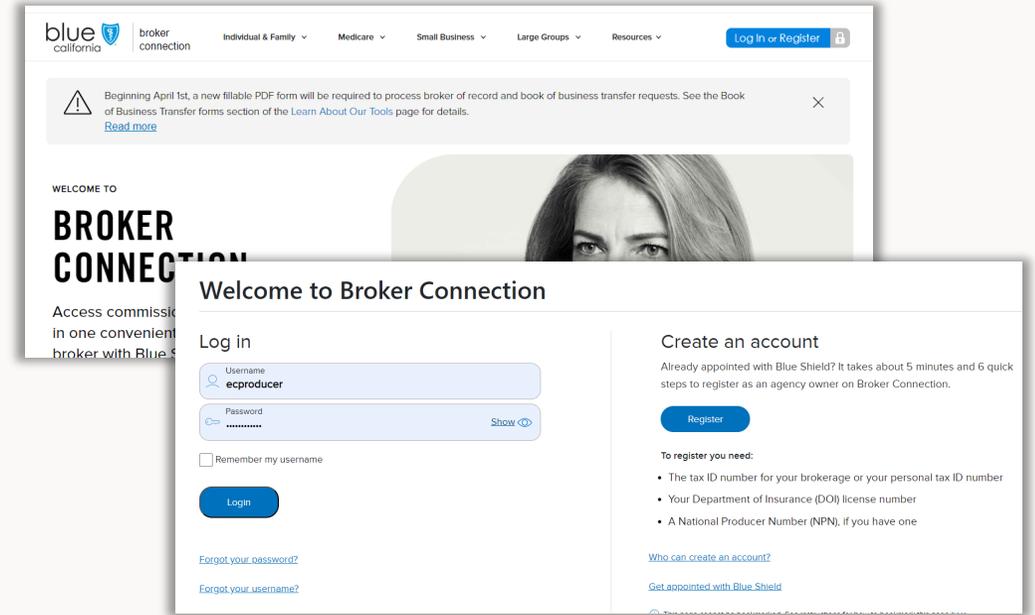


Additional acknowledgements and reminders will be provided in EET when a group has an EDI file

# 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

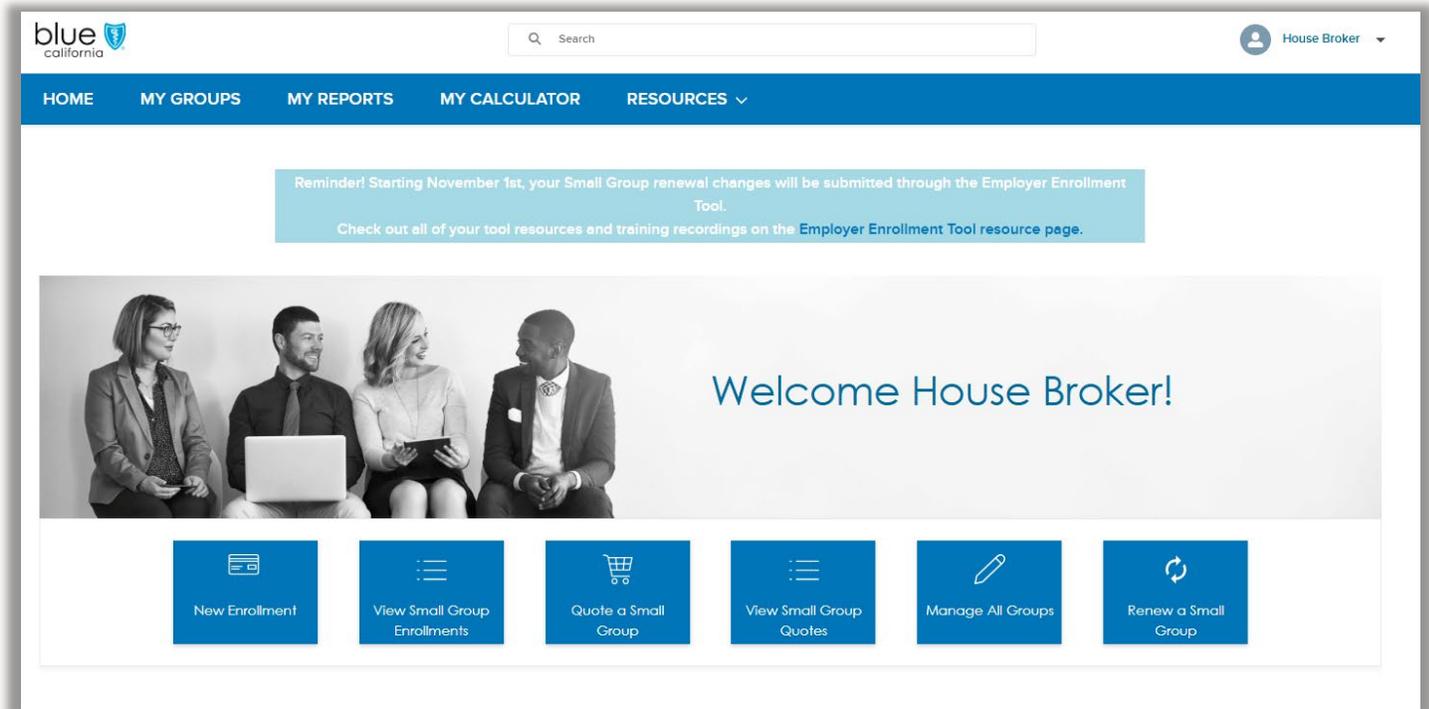
Use the top navigation to find helpful information

- 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

- New quotes **16-17**
- Renewal quotes **18-21**
- View quotes **22**
- Access quote documents **23**

# 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

Employer Information

Employer Information

Enter the employer and product selection information on each screen to create a quote.

You are able to edit information throughout the process, or save and come back to complete the quote at a later time. Once you have completed the quote, you have the options to save or email the document or continue on to enrollment.

Effective Date \*

Name of Business \*

Employer Census

Employer Census

Upload an employee census file or add employees individually

[Download census template](#)

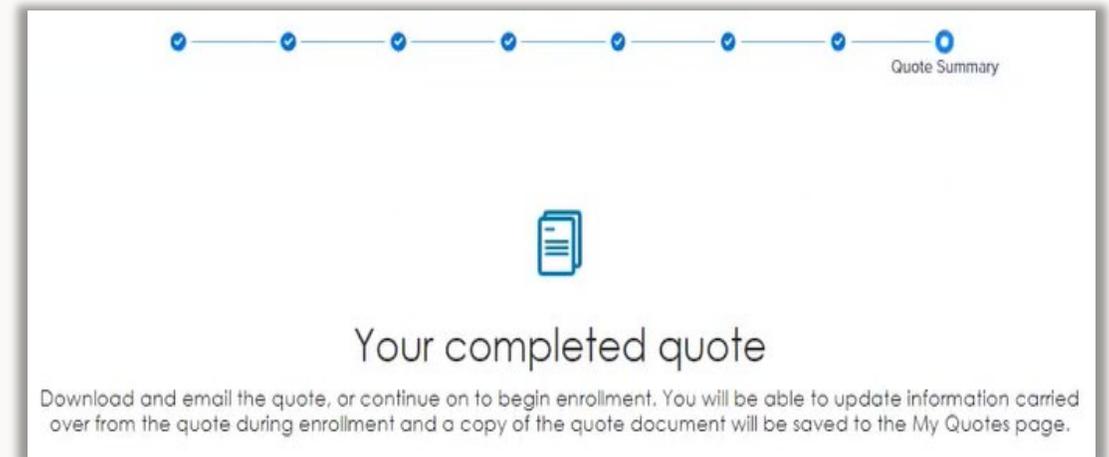
Total Insured	Employee Only	Employee+Child	Employee+Spouse	Employee+Family
0	0	0	0	0

- 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

The screenshot displays the renewal dashboard interface. At the top, there are navigation tabs for months from Feb 2024 to Jan 2025, with May 2024 selected. Below the tabs, a message instructs users to click the Action dropdown menu to begin the renewal process. A search bar and dropdown menus for Renewal Status and Open Enrollment Status are present, along with an 'Access Shield Renewal' button.

Action	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
Start Renewal	COMPANY A	W0126547	05/01/2024	7	5	\$0	\$0	n/a	Not Started	Not Started	
Start Open Enrollment	B	W0122859	05/01/2024	12	12	\$0	\$0	n/a	Not Started	Not Started	
Run a Quote	C	W0126552	05/01/2024	46	40	\$0	\$0	n/a	Not Started	Not Started	
	D	W011878	05/01/2024	60	60	\$0	\$0	n/a	In Progress	Not Started	
	COMPANY E	W0126632	05/01/2024	3	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY F	W0117430	05/01/2024	2	2	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY G	W0126581	05/01/2024	100	88	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY H	W0098369	05/01/2024	75	75	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY I	W0117526	05/01/2024	2	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY J	W0122937	05/01/2024								

**Employee medical rates and plan benefits**

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

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

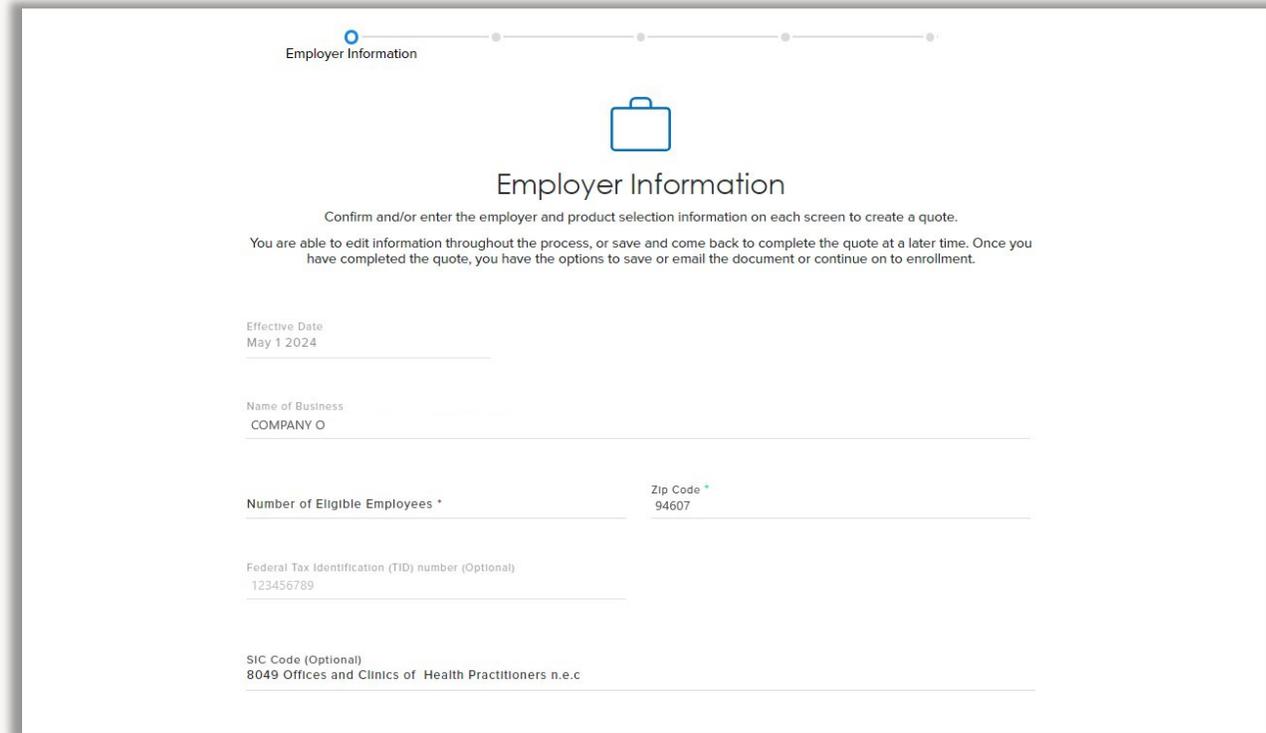
Single plan view

Plan benefits	In-network	Blue Shield Bronze 60 PPO 6300/60 + Child Dental
Medical deductible	In-network	\$6,300
Out-of-pocket maximum	In-network	\$9,100
Pharmacy deductible	In-network	\$500
Copayment	In-network	\$60
Emergency room	In-network	40%
Inpatient hospitalization	In-network	40%
Urgent care	In-network	\$60
Rx Tier 1	In-network	\$17
Rx Tier 2	In-network	40%
Rx Tier 3	In-network	40%
Rx Tier 4	In-network	40%

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

# Renewal quote – group information

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



The screenshot shows a web form titled "Employer Information" with a progress bar at the top. The form contains the following fields and values:

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

# Renewal quote - census

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

The screenshot displays the 'Employer Census' web interface. At the top, it says 'Employer Census' and 'Upload an employee census file or add employees individually'. Below this, there are statistics: 'Total Insured: 1', 'Employee Only: 1', 'Employee+Child: 0', 'Employee+Spouse: 0', and 'Employee+Family: 0'. There are buttons for 'Clear All', 'Upload Census', and 'Add an employee'. Below the statistics is a table with columns: First Name, Last Name, Birthdate, Age, Medical Status, Dental Status, Vision Status, Subscriber Zip, Gender, Salary, and Relationship. The first row contains: First, Last, 01/01/1964, 60, EE, , , , , Employee, and a dropdown menu.

Overlaid on the bottom right is a Microsoft Excel spreadsheet titled 'QCU\_Upload\_Template'. The spreadsheet has the following columns: A (First Name), B (Last Name), C (Birthdate), D (Age), E (Medical Status), F (Dental Status), G (Vision Status), H (Subscriber Zip), I (Gender), J (Salary), K, L, and M. The first row contains: First Name, Last Name, Birthdate, Age, Medical Status, Dental Status, Vision Status, Subscriber Zip, Gender, Salary, and empty cells for K, L, and M. The second row contains: First Name, Last, 1/1/1964, 60, EE, EE, EE, , , and empty cells for K, L, and M.

# Renewal quote - finalize your quote

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

The screenshot shows the 'Employer Contributions' form. At the top, there is a progress bar with five steps, and the fifth step, 'Employer Contributions', is highlighted. Below the progress bar is a large blue dollar sign icon and the title 'Employer Contributions'. The subtitle reads 'Enter the employer contributions for the products and coverage being quoted'. The form is divided into two columns: 'Medical' and 'Dental'. Each column has an 'Employee Contribution' section with a '\$' and '%' input field and an 'Enter a number' field. Below each 'Employee Contribution' section is a 'Dependent Contribution' section with a '\$' and '%' input field and an 'Enter a number' field. At the bottom of the form, there is a warning icon and the text 'Please note that once you click "Next" changes cannot be done.' There are 'Cancel', 'Next', and 'Previous' buttons.

The screenshot shows the 'Your Complete Quote' page. At the top, there is a progress bar with five steps, and the fifth step, 'Your Completed Quote', is highlighted. Below the progress bar is a blue document icon and the title 'Your Complete Quote'. The subtitle reads 'Here is your quote.' Below this, there is a paragraph: 'You can download and email the quote or continue on to the group enrollment. You can update the information in the quote at any time and a record of your quote will be available for 60 days.' There are three options: 'Send quote CSV via secure email', 'Download CSV file', and 'Request PDF'. At the bottom, there is a blue button labeled 'Return to Group Renewals'.

# 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

Account Name	Quote Name	Account Owner	Effective Date	Action - Start Renewal	Action - Request PDF
COMPANY A	COMPANY A - 5/1/2024	Default 383 User	2024-05-01		<a href="#">Request PDF</a>
COMPANY B	COMPANY B - 05/01/2024	Default 383 User	2024-05-01		<a href="#">Request PDF</a>

Quote Wicked Witch Co - 4/1/2020

Quote Number: 00001609 | Expiration Date: | Syncing:  | Opportunity Name: Wicked Witch Co - 4/1/2020 | Account Name: Wicked Witch Co | Grand Total: \$4,320.44

DETAILS | RELATED LIST

- Quote Line Items
- Quote PDFs
- Open Activities
- Activity History
- Notes & Attachments

# 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.

The screenshot shows the 'MY REPORTS' section of the Employer Enrollment Tool. At the top, there are navigation tabs for 'HOME', 'MY GROUPS', and 'MY REPORTS'. Below this, a quote is displayed: 'Quote Test Quote 1017 - 11/1/2020'. A table lists the quote details:

Quote Number	Account Name	Effective Date	Status
00002290	<a href="#">Test Quote 1017</a>	11/1/2020	Completed

Below the table, there is a search bar and a dropdown menu labeled 'Quote'. Underneath, the quote details are repeated:

Quote Number	00002290
Quote Name	Test Quote 1017 - 11/1/2020

At the bottom, the 'Files (4)' section is visible. It contains two files:

- Quote-00002290-10-18-2020.pdf (Oct 17, 2020 • 137KB • pdf)
- Blue Shield Medical Quote\_Test Quote 1017\_11/1/2020 (Oct 17, 2020 • 2KB • csv)

A blue box highlights the CSV file, and a white arrow points from it to the right, indicating the next step in the process.

The screenshot shows a PDF document titled 'Small Group health insurance proposal'. The document is for the business of 'Test Quote 1017'. It includes the following information:

- Effective Date: 11/01/2020
- Prepared by: House Broker (10/18/2020)
- Blue Shield of California logo
- Footer: blueshieldca.com/producer

# New group enrollment

- Group information (Master Group application) **25-26**
- Member census (Employee Enrollment application) **27**
- Completing the submission **28-29**
- Enrollment report **30**
- View enrollments **31**
- Withdraw an application **32**

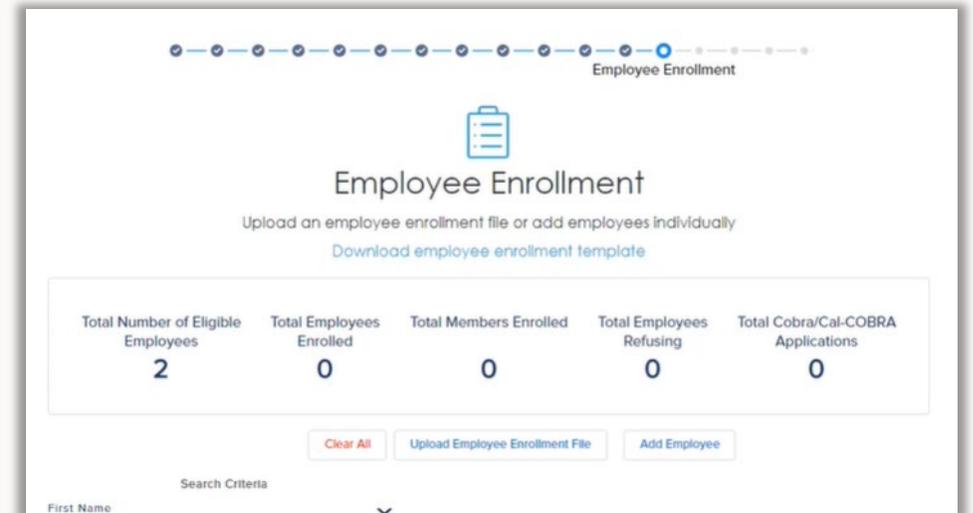
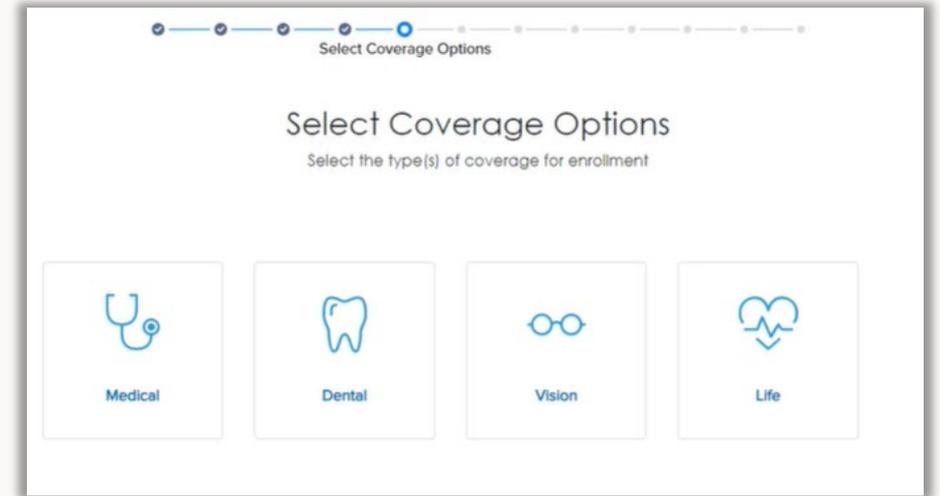
# New Group Enrollment

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

The screenshot shows a web form titled "Employer Information" with a blue briefcase icon. At the top, a progress bar indicates the current step. The form contains several input fields with red asterisks indicating required fields:

- Effective Date \*
- Federal Tax Identification (TID) number
- Group legal name \* (with a sub-label "Doing business as (DBA), if applicable")
- Principal business address - number and street (no P.O. box) \* (with an information icon)
- Principal Business Address City \*
- Principal Business Address State \*
- Principal Business Address Zip \*

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
<b>Legend:</b>			
	Required		
	Optional		
	Not Required		
	Incorrect Value		
<div style="border: 1px solid black; border-radius: 10px; padding: 5px; display: inline-block;">Export to .CSV</div>			
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.

The screenshot shows the 'Summary Review' page with a clipboard icon at the top. Below the title, it says 'Review and verify the group's enrollment selections'. A message states 'Group does not have any data errors to address at this time.' The page is divided into sections: 'Group Information' (Group Name: Its Quarantine, Effective Date: 07/01/2020, Group Number: W011974), 'Plan Information', and 'Medical Plan (16)' with a 'Change Medical Plan' link. The medical plan list includes: Platinum Tandem PPO 0/10 OffEx, Platinum Tandem PPO 250/15 OffEx, Gold Tandem PPO 0/20 OffEx, Gold Tandem PPO 500/30 OffEx, Gold Tandem PPO 750/30 OffEx, Gold Tandem PPO 1200/35 OffEx, Silver Tandem PPO 2300/45 OffEx, Silver Tandem PPO 1800/55 OffEx, Bronze Tandem PPO 5000/70 OffEx, Bronze Tandem PPO 6850/65 OffEx, Bronze Tandem PPO 6500/50 OffEx, Silver Tandem PPO Savings 2000/25% OffEx, and Silver Tandem PPO Savings 2500/35% OffEx.

The screenshot shows the signature confirmation section. It has two checkboxes: the first is checked and labeled 'I already have a signed paper copy of the Master Group Application', and the second is unchecked and labeled 'Send Master Group Application for electronic signature'. Below these are two paragraphs of text, each with an unchecked checkbox. The first paragraph is a certification of accuracy and a disclaimer about penalties. The second paragraph is a certification of record-keeping. At the bottom, there is a disclaimer: 'For your protection California law requires the following to appear on this form: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.'

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.

Payment Confirmation

## Group Payment Authorization

Enter the group's payment information

Choose Payment Option \*

One Time AutoPay

Account Type \*

Checking Savings

Application Complete

The application has been submitted for review. The group number is W0112903. Requests for additional information and application status updates will be sent to your email.

Finish

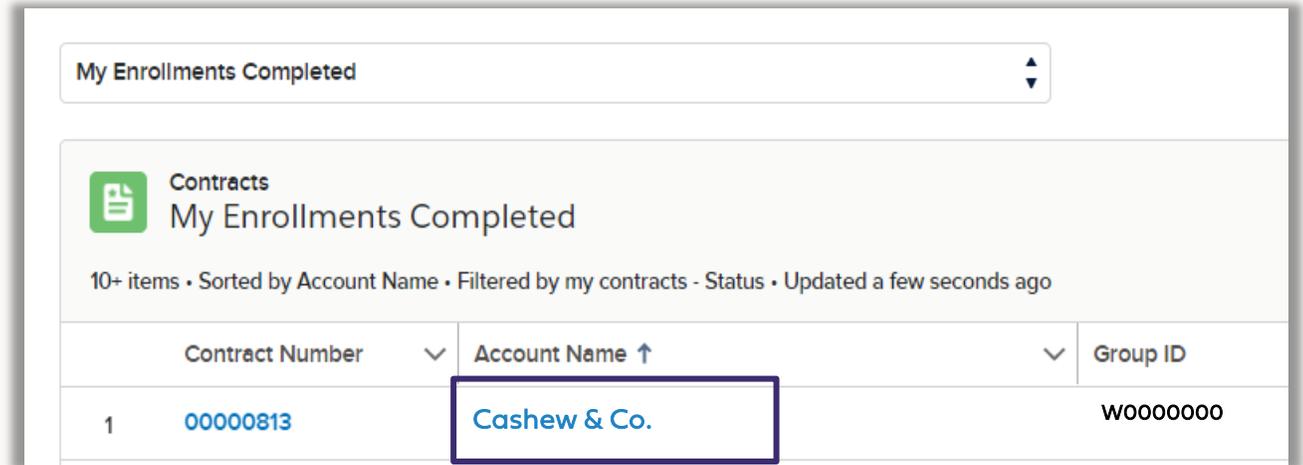
# Enrollment Proposal CSV

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

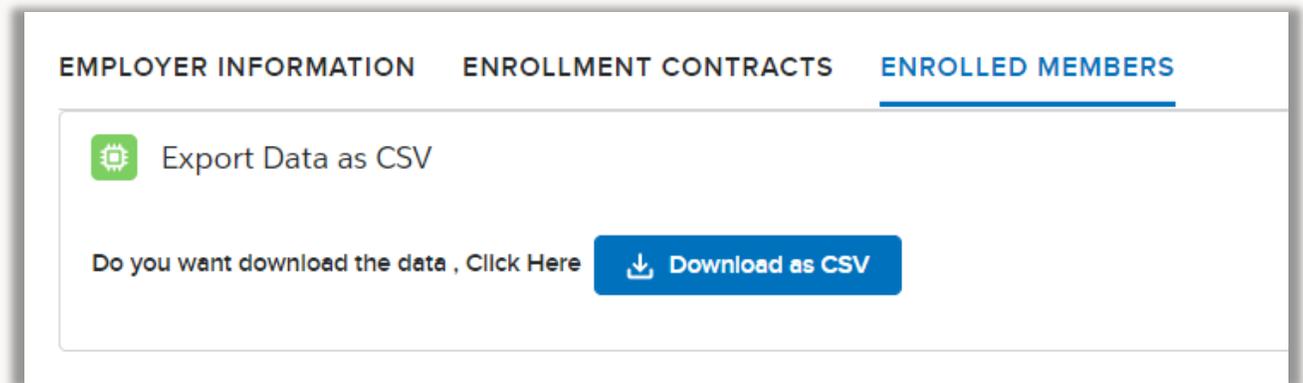
The file will become available once you receive an email that the group has been successfully installed.

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



	Contract Number	Account Name	Group ID
1	00000813	Cashew & Co.	W0000000



EMPLOYER INFORMATION   ENROLLMENT CONTRACTS   **ENROLLED MEMBERS**

Export Data as CSV

Do you want download the data , Click Here [Download as 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.

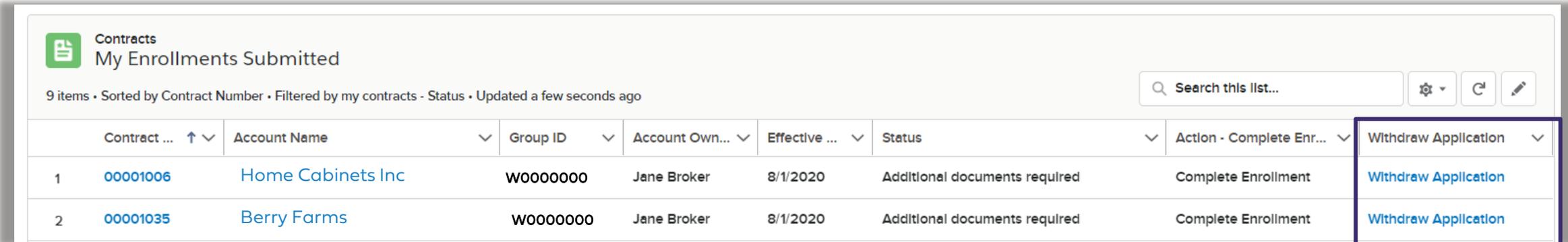
Contract No.	Contract Name	Group ID	Account	Created Date	Effective Date	Status	Action - Complete En.
1 0000497	ROC Test 5 - 2020-04-01	W012197	Jeff Miller	3/26/2020 11:17 AM	4/1/2020	Approved	Complete Enrollment
2 00001597	West Oz Security - 2020-04-01	W012295	Jeff Miller	3/31/2020 3:09 AM	4/1/2020	In Progress	Complete Enrollment
3 00001596	West TV - 2020-04-01		Jeff Miller	3/31/2020 3:04 AM	4/1/2020	In Progress	Complete Enrollment
4 00001591	AutomationMORUZW - 2020-04-01	W012289	Jeff Miller	3/30/2020 7:31 PM	4/1/2020	Broker response required	Complete Enrollment
5 00001590	AutomationEB0JHL - 2020-04-01	W012288	Jeff Miller	3/30/2020 7:21 PM	4/1/2020	Underwriting review required	Complete Enrollment
6 00001589	AutomationBYBYGW - 2020-04-01	W012287	Jeff Miller	3/30/2020 7:11 PM	4/1/2020	In Progress	Complete Enrollment
7 00001587	ROC Test 5 - 2020-04-01	W012197	Jeff Miller	3/30/2020 4:48 PM	4/1/2020	In Progress	Complete Enrollment
8 00001540	Wicked Witch Co - 2020-04-01	W012247	Jeff Miller	3/27/2020 12:58 PM	4/1/2020	In Progress	Complete Enrollment
9 00001579	AutomationZiqXGG - 2020-04-01	W012280	Jeff Miller	3/30/2020 10:32 AM	4/1/2020	Underwriting review required	Complete Enrollment
10 00001577	AutomationKwVgrTh - 2020-04-01	W012278	Jeff Miller	3/30/2020 10:23 AM	4/1/2020	Underwriting review required	Complete Enrollment
11 00001576	AutomationMLyz - 2020-04-01	W012277	Jeff Miller	3/30/2020 10:14 AM	4/1/2020	In Progress	Complete Enrollment
12 00001575	AutomationWCJnGS - 2020-04-01	W012276	Jeff Miller	3/30/2020 9:55 AM	4/1/2020	Broker response required	Complete Enrollment
13 00001574	AutomationNqDjaAm - 2020-04-01	W012275	Jeff Miller	3/30/2020 9:39 AM	4/1/2020	In Progress	Complete Enrollment

Name	HDHP Plan	Infertility Rider	Status
<a href="#">Platinum Full PPO 250/15 OPEX</a>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<a href="#">Bronze Full PPO 5000/70 OPEX</a>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<a href="#">DHMO Basic</a>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<a href="#">Life/AD&amp;D 1X Salary min \$15,000 max \$50K</a>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<a href="#">Basic Life and AD&amp;D Insurance - \$35,000</a>	<input type="checkbox"/>	<input type="checkbox"/>	Active
<a href="#">Life/AD&amp;D 2X Salary min \$15,000 max \$30K</a>	<input type="checkbox"/>	<input type="checkbox"/>	Active

# 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



The screenshot displays a web interface for managing contracts. At the top left, there is a green document icon and the text "Contracts My Enrollments Submitted". Below this, it says "9 items • Sorted by Contract Number • Filtered by my contracts - Status • Updated a few seconds ago". On the right side, there is a search bar labeled "Search this list...", a settings gear icon, a refresh icon, and an edit icon. The main part of the interface is a table with the following columns: "Contract ...", "Account Name", "Group ID", "Account Own...", "Effective ...", "Status", "Action - Complete Enr...", and "Withdraw Application". The "Withdraw Application" column is highlighted with a blue border, and a dropdown menu is open, showing the option "Withdraw Application".

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 level changes **34-58**
- Member level changes **59-70**

# 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.

The screenshot shows a web application interface for managing a group account. At the top, there is a navigation bar with links for HOME, MY GROUPS, MY REPORTS, and RESOURCES. Below the navigation bar, there are four buttons: Terminate Employees, Cancel Group, Enroll Employee, and Edit Group. The main content area displays the account details for 'TRAVEL AGENCY'. Below the account name, there is a table with the following data:

Group ID	Status	Business Unit	Cancel Date	Account Payment Status
W0126155	Active	ISGBU	12/31/2999	Current

Below the table, there is a navigation menu with the following options: EMPLOYER INFORMATION (selected), MEMBER ROSTER, ENROLLMENT CONTRACTS, EMPLOYER CONTACTS, PLANS, PAYMENT, and MORE. Under EMPLOYER INFORMATION, there are several expandable sections:

- > Account Information
- ∨ Address Information
  - > Principal Address
  - > Billing Address
- > Waiting Period
- ∨ Group Contribution

# Enroll employees

Use for - Enrolling new employees and their dependents

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

**Enroll a member**

Enter the subscriber application information into the fields.

Required fields must be completed before moving forward.

▼ Qualifying Event Details

Qualifying Event\*      Qualifying Event Date\*

Are you a Full-Time or Part-Time Employee? \*

Full-Time    Part-Time

Effective Date

The effective date does not reflect the group's waiting period calculations. If a waiting period applies, the effective date will be recalculated once it is received for processing.

> Demographics  
*Please expand to fix all invalid fields.*

> Subscriber Details  
*Please expand to fix all invalid fields.*

> Other Health Plan Information  
*Please expand to fix all invalid fields.*

# Enroll employees

## continued

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

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

**Plan selections**  
Make the member plan selections

Click on the member's name to open the fields to change the products and/or plans. Only the products and plans within the product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.

Plans for current year enrollment @

Next  
Previous

product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.

Plans for current year enrollment @

First Name employee Last Name name

**Medical**

Accept  Decline

Please select at least one plan to continue.

Save

# Group cancellation

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

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

### Cancel Group

Canceling the group will terminate coverage from Blue Shield of California coverage.

Are you sure you want to cancel this group? \*

Yes  No

Cancellation Date\* 

Reason code\* 

Next

# Bulk member cancelation

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

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

**Terminate Employees**

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

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

# 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.

Member Name	Member ID	Termination Date	Benefit End Date	Cancel Reason	CalCOBRA Eligible	CalCOBRA Eligible ...
<input type="checkbox"/> MINDY K KALING	912912912	<input type="text"/>	<input type="text"/>	Select an Op...	Select an O...	Select an Op...
<input type="checkbox"/> PARKER POSEY	915915915	<input type="text"/>	<input type="text"/>	Select an Op...	Select an O...	Select an Op...

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

# Bulk member cancelation continued

## CSV document upload

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

The screenshot displays a web interface for bulk member cancelation. It features a 'Download template' link in blue text. Below this, there are two input fields: 'Enter Terminations' and 'Upload file'. To the right of the 'Enter Terminations' field is a blue-bordered button labeled 'Upload File'. To the right of the 'Upload file' field is a button labeled 'Clear'.

# Class offerings

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

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

### Class Offerings

Make changes to the enrollment classes offered by the group

Check the box to select an available class to be added to the group.

Classes cannot be offered cannot be re-selected.

The group currently offers the classes listed in the table

ACTIVE CA ELIGIBLES
---------------------

Select the button in the below list of available classes to add a new class to the group. You do not need to select the classes already offered.

Active out of state employees

COBRA California members

COBRA out of state members

 Please select atleast one class from the above list

Effective Date  
04-01-2023 

# Group contacts

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

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

Update Primary Contact

Existing Primary Contact

Name\* Lisa Courtemanche Phone\* (555) 123-4555 Email\* lcourtemanche@dtwc.com.Invalid Cancel Date

Add Contact

Update Secondary Contacts

Existing Secondary Contacts

Contact Name\* Stephanie Kenyon Phone Number\* (619) 525-2663 Email\* no\_one@email.com.Invalid

February 2024

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

Today

# Group plan changes

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

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

### Group plan modifications

Specify the type of group plan change

Check the box to identify the type of plan change and provide the effective date. Click on the product cards to identify the product being modified. Multiple product cards can be selected at a time. Products and plans not being modified do not need to be selected.

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

Yes  No

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

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

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

Cancel a product or cancel plans within your existing product

Select Coverage Options

  
Medical

  
Dental

  
Vision

  
Life

# Group plan changes continued

## Add a plan or product

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

### Select Medical Coverage

Make the group plan selections

To add a plan, select the plan package or option to view the networks and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the blue Cancel link in the current plan table. Select and use the arrows to move the plan name into the canceled plan label.

Current Plans

Gold Full PPO 500/30 OffEx

Bronze Full PPO 7500/65 OffEx

Select Plan Package

Off-Exchange

Mirror

Network

Trio ACO HMO

Access+ HMO

Local Access+ HMO

Tandem PPO

Full PPO

# Group plan changes continued

## Cancel a plan or product

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

### Select Medical Coverage

Make the group plan selections

To add a plan, select the plan package or option to view the networks and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the blue Cancel link in the current plan table. Select and use the arrows to move the plan name into the canceled plan label.

Current Plans		Canceled Plans
Platinum Access+ HMO (R) 0/25 OffEx	▶	Platinum Access+ HMO (R) 0/20 OffEx
Platinum Access+ HMO (R) 0/30 OffEx		▶
Silver Access+ HMO (R) 2300/70 OffEx		Bronze Access+ HMO (R) 7000/70 OffEx
Silver Access+ HMO (R) 2750/70 OffEx		Gold Access+ HMO (R) 0/35 OffEx
		Gold Access+ HMO (R) 1000/35 OffEx

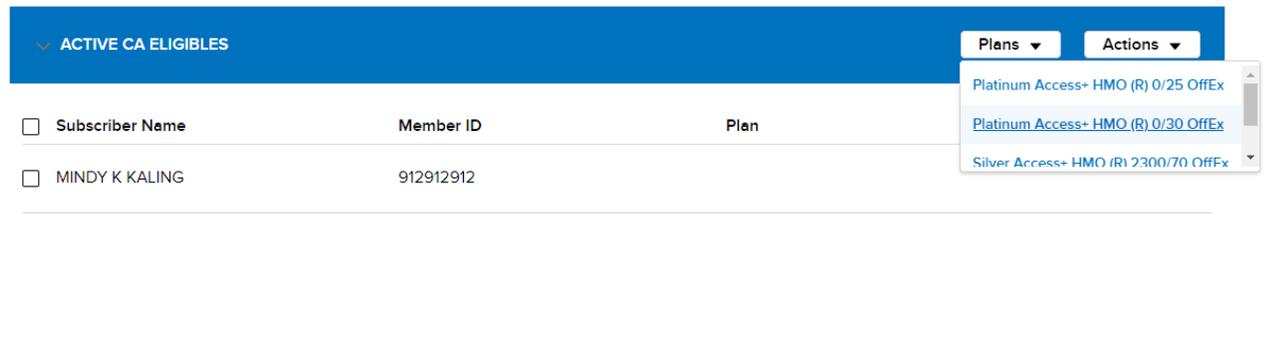
Check this box to acknowledge that the above specified plans will be cancelled, and these plans will no longer be available for enrollment

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

# Bulk member plan changes

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

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



The screenshot displays a web interface for managing active California eligibles. At the top, there is a blue header with the text "ACTIVE CA ELIGIBLES" and a dropdown arrow. To the right of the header are two buttons: "Plans" and "Actions", both with dropdown arrows. Below the header is a table with three columns: "Subscriber Name", "Member ID", and "Plan". The table contains one row with the following data: "MINDY K KALING" in the Subscriber Name column, "912912912" in the Member ID column, and a dropdown menu in the Plan column. The dropdown menu is open, showing three options: "Platinum Access+ HMO (R) 0/25 OffEx", "Platinum Access+ HMO (R) 0/30 OffEx", and "Silver Access+ HMO (R) 2300/70 OffEx".

<input type="checkbox"/> Subscriber Name	Member ID	Plan
<input type="checkbox"/> MINDY K KALING	912912912	<a href="#">Platinum Access+ HMO (R) 0/25 OffEx</a> <a href="#">Platinum Access+ HMO (R) 0/30 OffEx</a> <a href="#">Silver Access+ HMO (R) 2300/70 OffEx</a>

# Bulk member plan changes

## Off-cycle plan changes

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

**Move impacted subscribers to new plans**

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

ACTIVE CA ELIGIBLES			Plans	Actions
<input checked="" type="checkbox"/>	Subscriber Name	Member ID	Plan	
<input checked="" type="checkbox"/>	MINDY K KALING	912912912		<ul style="list-style-type: none"><li>Gold Access+ HMO (R) 500/35 OffEx</li><li>Platinum Access+ HMO (R) 0/25 OffEx</li><li>Platinum Access+ HMO (R) 0/30 OffEx</li></ul>

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

# Bulk member plan changes

## Open enrollment changes

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

**Move impacted subscribers to new plans**

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

ACTIVE CA ELIGIBLES			Bronze DPPO/\$1500/MAC/Child Only Ortho	Actions
<input checked="" type="checkbox"/>	Subscriber Name	Member ID	Plan	Assign Plans
<input checked="" type="checkbox"/>	MINDY K KALING	912912912		Reset
<input checked="" type="checkbox"/>	PARKER POSEY	915915915		Clear All

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

# Group details

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

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

### Group details

Make changes to the group demographic information

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

Required fields must be completed before moving forward.

Update Principal Business Address

 525 GARDEN STREET SANTA BARBARA CA

Update Billing Address(es)

 CLEAR CONSTRUCTION 525 GARDEN STREET SANTA BARBARA

[Next](#)

[Previous](#)

[Cancel](#)

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

# Employer contributions

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

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

### Employer Contributions

Please define the employer contribution

**Dental**  Subscriber Contribution

\$  %  Enter a number\*

Dependent Contribution

\$  %  Enter a number\*

# Structure change

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

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

### Update Business Name

Enter only the information that is changing into the corresponding fields.  
Use the checkbox to select the type of structure change.

New Group Legal Name  New Federal Tax ID (TID) number

New Doing business as (DBA)

New Standard Industry Classification (SIC) and Industry description

New Legal Entity Type

✓ Select the type of change(s) requested:

Simple Name Change

Comprehensive Business Change

 Please select the type of change(s) requested

# Structure change - complex

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

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

### Update Business Name

Select all that apply :

- Ownership change
- Business purchase or sale
- Entity type change
- Employees moving to other existing business
- Add subsidiary/affiliate business
- Merger
- Other

Enter the total number of current Full Time and Full Time Equivalent employees. @ \_\_\_\_\_

How many employed in prior calendar quarter? @ \_\_\_\_\_

How many employed in prior calendar year? @ \_\_\_\_\_

Enter the total number of current Full Time and Full Time Equivalent employed out of state. @ \_\_\_\_\_

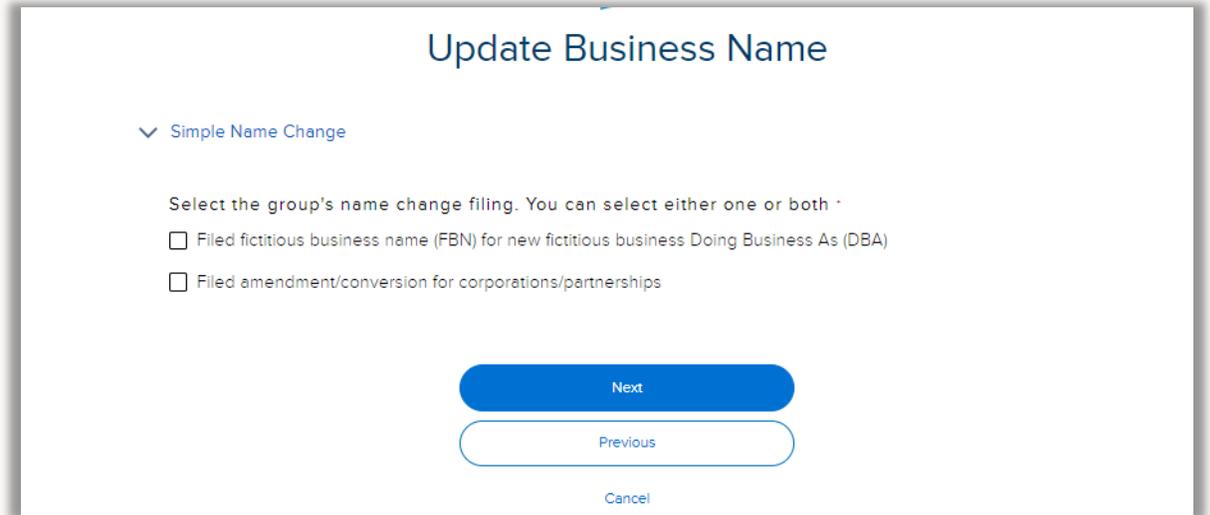
Enter the total number of FTE and FTE employed out of state during the prior calendar quarter. @ \_\_\_\_\_

Enter the total number of FTE and FTE employed out of state during the prior calendar year \_\_\_\_\_

# Structure change - simple

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

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



Update Business Name

▼ Simple Name Change

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

- Filed fictitious business name (FBN) for new fictitious business Doing Business As (DBA)
- Filed amendment/conversion for corporations/partnerships

Next

Previous

Cancel

# Billing attribute

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

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

**Modify Billing Information**

Organize how each premium statement ID appears on the bill. Use the toggle buttons to select the desired bill layout.

Premium Statement Print Id

CLEAR CONSTRUCTION  Standard Bill  Sort by Department Code

Save

Next

Previous

Cancel

The screenshot shows a web form titled "Modify Billing Information". The form contains a heading, a descriptive paragraph, and a section labeled "Premium Statement Print Id". This section includes a "CLEAR CONSTRUCTION" link, two toggle buttons for "Standard Bill" and "Sort by Department Code" (both of which are currently selected), and a "Save" button. Below the form are three navigation buttons: "Next" (highlighted in blue), "Previous", and "Cancel".

# Eligibility Options: waiting period

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

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

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

### Eligibility Options

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

▼ **Waiting Period**

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

Effective Date 

ACTIVE CA ELIGIBLES Effective on the 91st day following d... ▼

## Eligibility Options: continuation coverage

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

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

### Eligibility Options

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

> **Waiting Period**

∨ **COBRA and Cal-COBRA Coverage**

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

Effective Date  
01-01-2024

Federal COBRA  Cal-COBRA

# Eligibility Options: continuation coverage

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

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

### Eligibility Options

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

- > [Waiting Period](#)
- > [COBRA and Cal-COBRA Coverage](#)
- ▼ [Part Time Employee Coverage](#)

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

Effective Date  
03-01-2024

Yes    No

Total number of eligible part time employe...  
1

# 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.

The screenshot shows the Blue Shield of California member roster page. At the top, there is a search bar with 'sgaprtstgr' entered and a user profile for 'Test House Broker'. Below the navigation bar, there are buttons for 'Cancel Group', 'Enroll Employee', and 'Edit Group'. The main content area displays account information for 'Account SGAPRTESTGRP68' with details like Group ID (W2125231), Status (Approved), Business Unit (ISGBU), No of Employees (5), Cancel Date (12/31/2999), and Account Payment Status. A tabbed interface shows 'MEMBER ROSTER' as the active tab. Below the tabs, there is a search bar and filter options for Status and Effective Date. A table lists six members with columns for Member Name, Member Id, Birth Date, Status, Effective Date, Benefit Begin Date, and Benefit End Date. The members listed are VAHRADIAN STEPHANIE, HERAS SOTO TODD, JARIEL JEFFREY, OSSER BEVERLY, MICHAELA JONES, and MARIAN SABOO. A 'Download as CSV' button is visible in the top right of the roster section.

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

# 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.

The screenshot shows a member account page for Miguel Torres. At the top right, there are four buttons: "Go back to group", "ID Card", "Cancel member", and "Edit Subscriber". Below these buttons, the member's name "MIGUEL TORRES" is displayed next to a blue square icon. Underneath, a table lists key details: Subscriber Id (909338975), Group (CLEAR CONSTRUCTION), and Status (Active). A navigation bar below this contains tabs for "DETAILS", "PLANS", "DEPENDENTS", "TRANSACTION HISTORY", and "PRIMARY CARE PROVIDER". The "DETAILS" tab is selected and expanded to show "Subscriber Information". This section contains a table with fields for First Name (MIGUEL), Last Name (TORRES), Middle Initial, Date Of Birth (09-07-1989), Age (34), Gender (Male), Date Of Hire (07-29-2019), Original Effective Date (2019-10-01), and SSN (615431172). Below this is the "Address Information" section, which contains a table with fields for Home Street Address, Address Line 2, City, State, and Zip. The address is 304 W ROBERT AVE, OXNARD, CA 93030. The "Contact Information" section is partially visible at the bottom.

Subscriber Id	Group	Status
909338975	CLEAR CONSTRUCTION	Active

**Subscriber Information**

First Name	MIGUEL	Date Of Birth	09-07-1989
Last Name	TORRES	Age	34
Middle Initial		Gender	Male
Date Of Hire	07-29-2019	SSN	615431172
Original Effective Date	2019-10-01		

**Address Information**

Home Street Address	Address Line 2	City	State	Zip
304 W ROBERT AVE		OXNARD	CA	93030
Mailing Street Address	Address Line 2	City	State	Zip
304 W ROBERT AVE		OXNARD	CA	93030

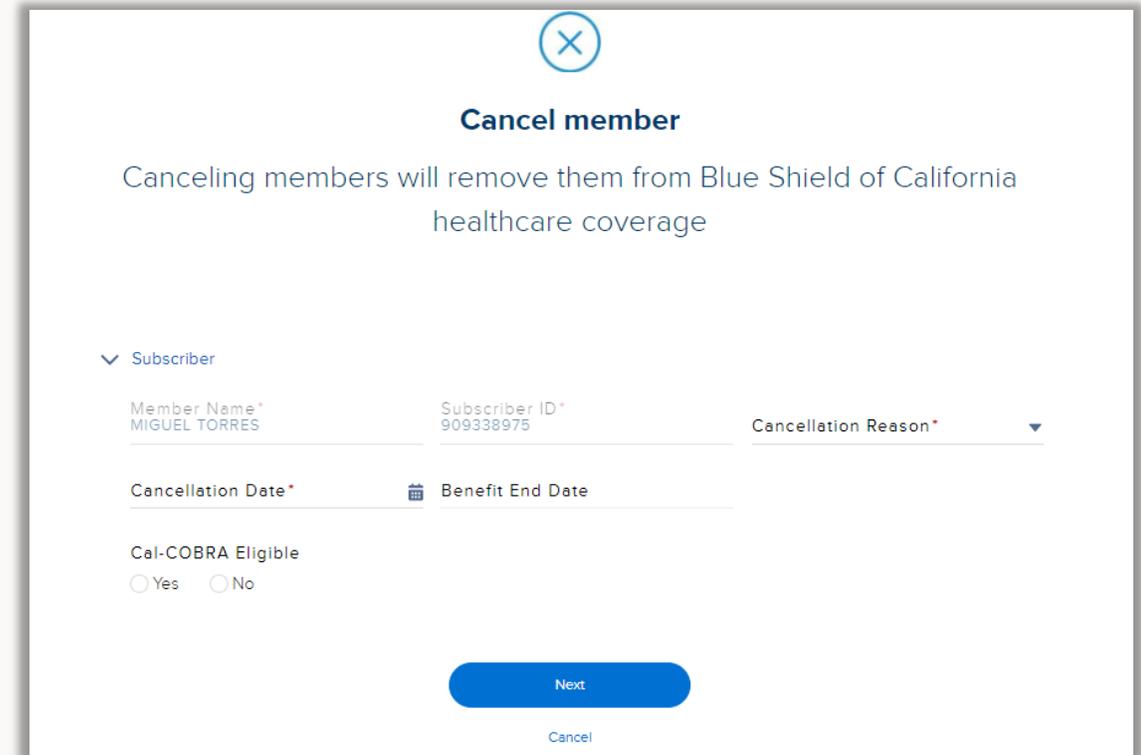
**Contact Information**

# Member cancellation

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 cancellation 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.



The screenshot shows a web form titled "Cancel member" with a close button (X) in the top right corner. Below the title is a warning message: "Canceling members will remove them from Blue Shield of California healthcare coverage". The form contains several input fields and a dropdown menu:

- Subscriber** (dropdown arrow):
  - Member Name\*: MIGUEL TORRES
  - Subscriber ID\*: 909338975
  - Cancellation Reason\* (dropdown arrow)
- Cancellation Date\* (calendar icon)
- Benefit End Date (calendar icon)
- Cal-COBRA Eligible:
  - Yes
  - No

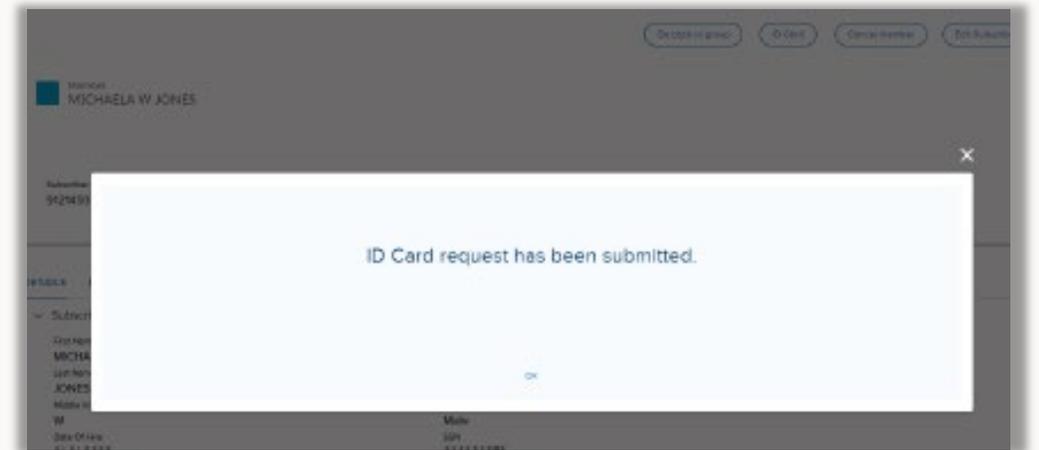
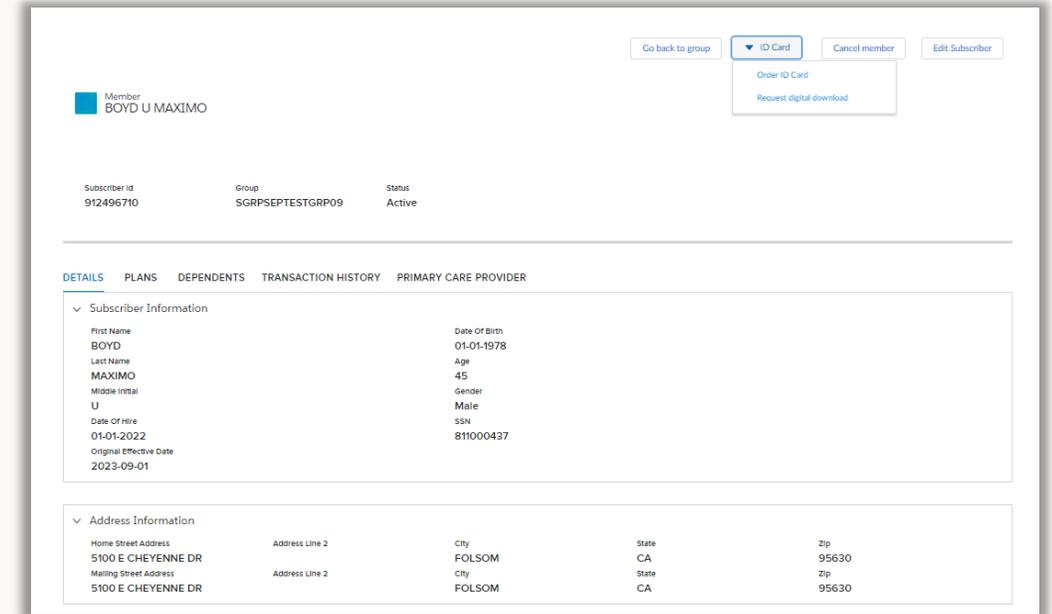
At the bottom of the form, there are two buttons: a blue "Next" button and a "Cancel" link.

# Order ID cards

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

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

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

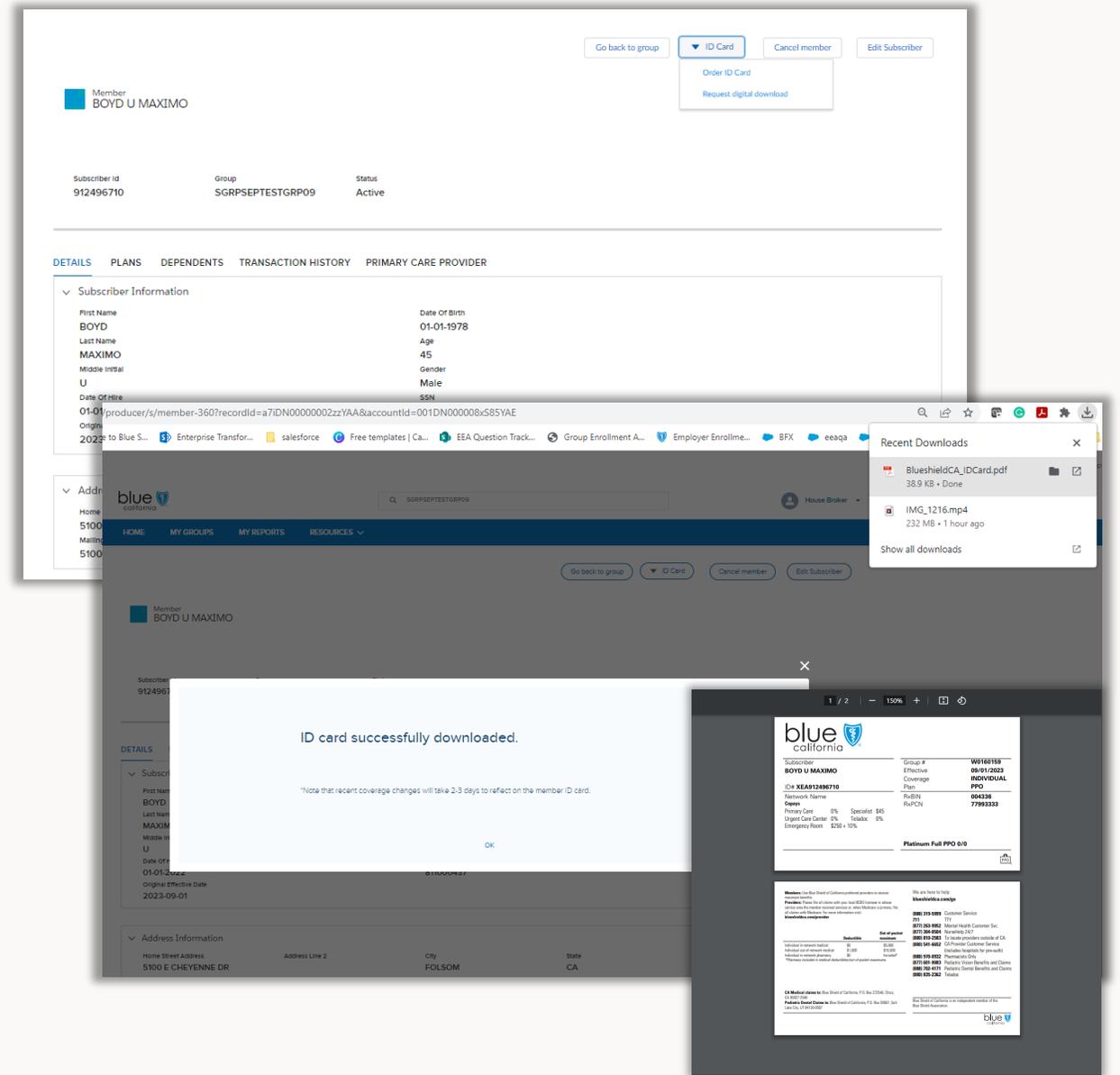


# Download ID cards

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

How - Click on the ID card button on the member account page and select the digital download option. A window will open confirming the ID card order. Only medical ID cards are available at this time.

Tip! Changes to the member record can take up to 2 business days to generate a new ID card.



# Member plan changes

Use for – Member plan changes to products and plans.

How – This transaction has a two-screen workflow.

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

**Member plan modifications**

Specify the type of member plan change

Check the box to identify the type of member plan change to edit enrolled plans or cancel enrolled plans. Then provide the date for this change and request reason.

Add Products or Change Plans  Cancel Product

Qualifying Event\* ▼

Qualifying Event Date 📅

Select the Effective Date for Adding New Product and/or New Plans 📅

[Next](#)

[Previous](#)

[Cancel](#)

# Member plan changes continued

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

Make the member plan selections

Click on the member's name to open the fields to change the products and/or plans. Only the products and plans within the product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.

Plans for current year enrollment @

 employee name

Next

Previous

Cancel

product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.

Plans for current year enrollment @

First Name employee Last Name name ×

**Medical**

Accept  Decline

 Please select at least one plan to continue.

Save

# Add dependents

Use for – enroll dependents to an existing subscriber.

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

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

### Add dependent

Enroll dependents to the subscriber

Enter the member application information into the fields. Click +Add new dependent to enroll multiple dependents together.  
Click Delete dependent to remove the additional dependent application fields.

Required fields must be completed before moving forward.

Qualifying Event\*  
Loss of Coverage

Qualifying Event Date  
08-29-2023

Effective Date  
08-30-2023

The effective date does not reflect the group's waiting period calculations. If a waiting period applies, the effective date will be recalculated once it is received for processing.

Dependent Details

Dependent Type\*

First Name\* Middle Initial Last Name\*

Date of Birth\* Primary Care Provider Primary Care Dentist [Find a Doctor](#)

Gender\*

Gender Identity

SSN

Communication Preference Email

Same address as subscriber?  Yes  No

Same Race and Ethnicity as the subscriber?  Yes  No

[Add another dependent](#)

# Add dependents continued

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

### Plan selections

Make the member plan selections

Click on the member's name to open the fields to change the products and/or plans. Only the products and plans within the product offered by the group will display. Use the radio buttons to accept or decline a product and the drop down window to select the plan for enrollment and then save before moving forward.

Plans for current year enrollment @

 **MIGUEL** TORRES

 dependent name ×

First Name dependent \_\_\_\_\_ Last Name name \_\_\_\_\_ ×

**Medical**

Accept  Decline Gold Trio HMO 0/30 OffEx

Save

Next

Previous

Cancel

# Member details

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

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

### Member details

Make changes to the member demographic information

Click on the member type to open the fields to change the member information.

Required fields must be completed before moving forward.

▼ Subscriber

First Name* MIGUEL	Middle Initial ▼	Last Name* TORRES
SSN 615431172	Date of Birth* 09/07/1989	📅
Gender* Male	Gender Identity ▼	Marital Status* Single
Date of Hire 07-29-2019		📅
Subscriber Status *		
<input checked="" type="radio"/> Full Time <input type="radio"/> Part Time		
Earnings (excluding overtime, bonuses, etc.)		Earnings Frequency ▼
Salary Effective Date		📅
Effective Date 10-01-2019		📅

# Member contact & classification

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

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

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

**Member contact and classification**

Make changes to the member address, contact information, class, subgroup, and department code

Click on the member's name to open the fields to change the member information.

Required fields must be completed and saved before moving forward.

Subscribers

MIGUEL TORRES

Home (Physical) Address\*  
304 W ROBERT AVE

City\* OXNARD State\* CA Zipcode\* 93030

Address Line 2

Use updated Home address for mailing address

Use updated Home address for all dependents

Mailing address (if different from home)\*  
304 W ROBERT AVE

City\* OXNARD State\* CA Zipcode\* 93030

Address Line 2

Work Phone  
805 793 9407

Home Phone

Language Preference\*  
English

Email

Class\*  
ACTIVE CA ELIGIBLES Effective Date\* 10-01-2019

Sub Group\*  
CLEAR CONSTRUCTION Effective Date\* 10-01-2019

Add/Update Department Code  Cancel Department Code

Department Code Effective Date

Save

Next

Previous

Cancel

# Federal COBRA enrollment

Use for – Enroll an existing subscriber in COBRA.

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

### COBRA enrollment

Enroll the subscriber and any dependents into COBRA

Enter the COBRA application information into the fields. Use the radio buttons and drop down windows to change the current plan selections for the COBRA coverage. Required fields must be completed before moving forward.

▼ Qualifying Event Details

Choose Qualifying Events ▼ Original Qualifying Event Date\* 

▼ Classification Selection

Class\* ▼ Subgroup\* ▼

This field is required. This field is required.

 The group indicated that they do not cover COBRA members. Please cancel this enrollment and navigate to Class Offerings within the group maintenance section before beginning the COBRA enrollment.

# Renewal

- Renewal dashboard **71-75**
- Group level changes **76-83**
- Member level changes **84-92**

# 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.

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

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

Search Renewal Status Open Enrollment Status

Access Shield Renewal

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

HOME MY GROUPS MY REPORTS RESOURCES

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

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

Search Renewal Status Open Enrollment Status

Access Shield Renewal

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

# Navigate the dashboard

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

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

Search

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

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	W000001	12/01/2024	5	5	\$272	\$272	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	2	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	

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

Search

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

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

# Leverage the dashboard

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

## Managing passive renewal clients

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

## How

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

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

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

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

	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▾	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▾	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▾	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
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	

HOME MY GROUPS MY REPORTS RESOURCES ▾

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

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

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

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

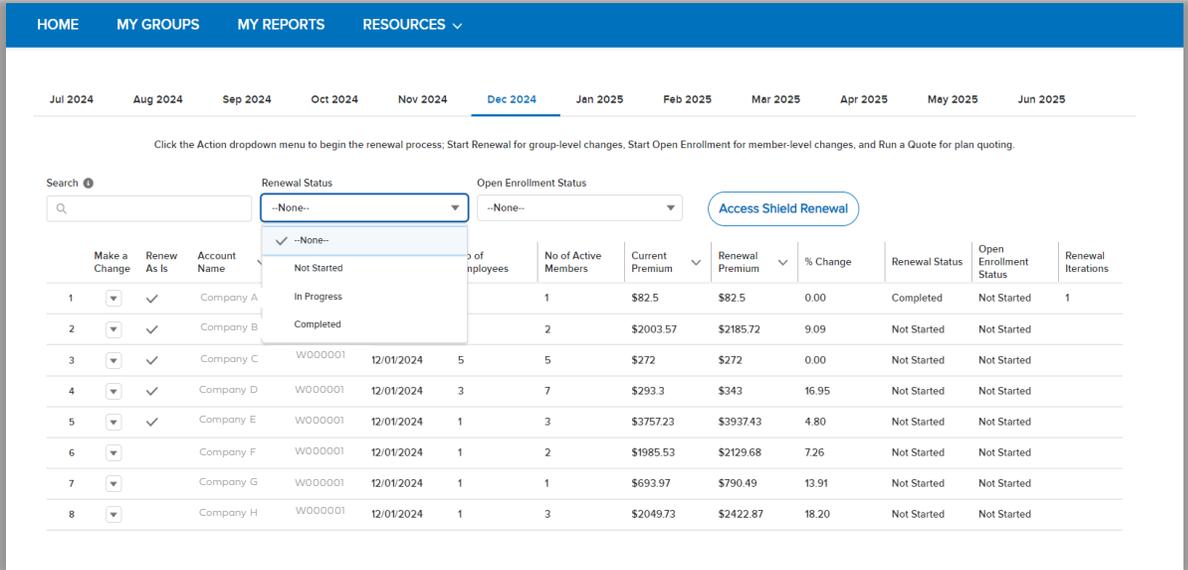
# Leverage the dashboard

## Managing active renewal clients

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

### How:

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



The screenshot displays a dashboard interface for managing renewal clients. At the top, there is a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below this is a monthly navigation bar from July 2024 to June 2025, with 'Dec 2024' selected. A search bar and two dropdown menus for 'Renewal Status' and 'Open Enrollment Status' are present, both currently set to '--None--'. A blue button labeled 'Access Shield Renewal' is also visible. The main content is a table with columns: 'Make a Change', 'Renew As Is', 'Account Name', 'Renewal Status', 'Open Enrollment Status', and 'Renewal Iterations'. The table lists 8 companies (A through H) with their respective renewal statuses and iteration counts. A dropdown menu is open for the 'Renewal Status' column of the first row, showing options: '--None--', 'Not Started', 'In Progress', and 'Completed'.

Make a Change	Renew As Is	Account Name	Renewal Status	Open Enrollment Status	Renewal Iterations
1	✓	Company A	In Progress	Not Started	1
2	✓	Company B	Completed	Not Started	1
3	✓	Company C	Not Started	Not Started	1
4	✓	Company D	Not Started	Not Started	1
5	✓	Company E	Not Started	Not Started	1
6	✓	Company F	Not Started	Not Started	1
7	✓	Company G	Not Started	Not Started	1
8	✓	Company H	Not Started	Not Started	1

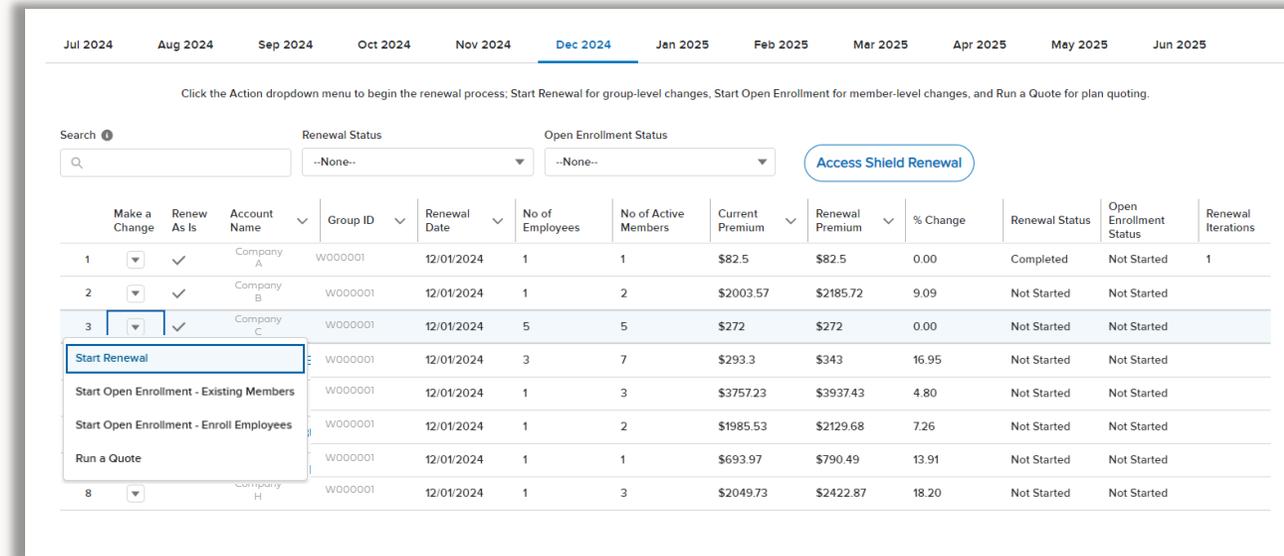
# Submit group-level renewal changes

## Navigate to group-level changes

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

## Submission tips

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



The screenshot shows a renewal dashboard for December 2024. At the top, there are navigation tabs for months from Jul 2024 to Jun 2025. Below the tabs is a search bar and filters for Renewal Status and Open Enrollment Status, both set to "--None--". A button labeled "Access Shield Renewal" is visible. The main part of the dashboard is a table with columns: Make a Change, Renew As Is, Account Name, Group ID, Renewal Date, No of Employees, No of Active Members, Current Premium, Renewal Premium, % Change, Renewal Status, Open Enrollment Status, and Renewal Iterations. Row 3 is highlighted, and its action menu is open, showing options: Start Renewal, Start Open Enrollment - Existing Members, Start Open Enrollment - Enroll Employees, and Run a Quote.

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

# View real-time renewals

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

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

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

Renewal Information

### It's time to renew

Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.

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

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

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

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

[Download Member Roster](#)

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

# 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 Information

### It's time to renew

Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.

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

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

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

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

[Download Member Roster](#)

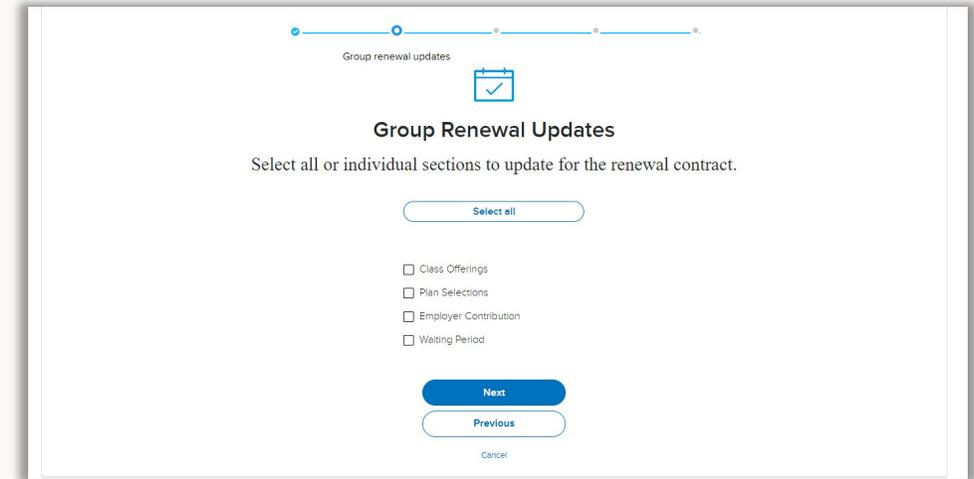
If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

# Renewal - select the changes

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

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

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



Group renewal updates

**Group Renewal Updates**

Select all or individual sections to update for the renewal contract.

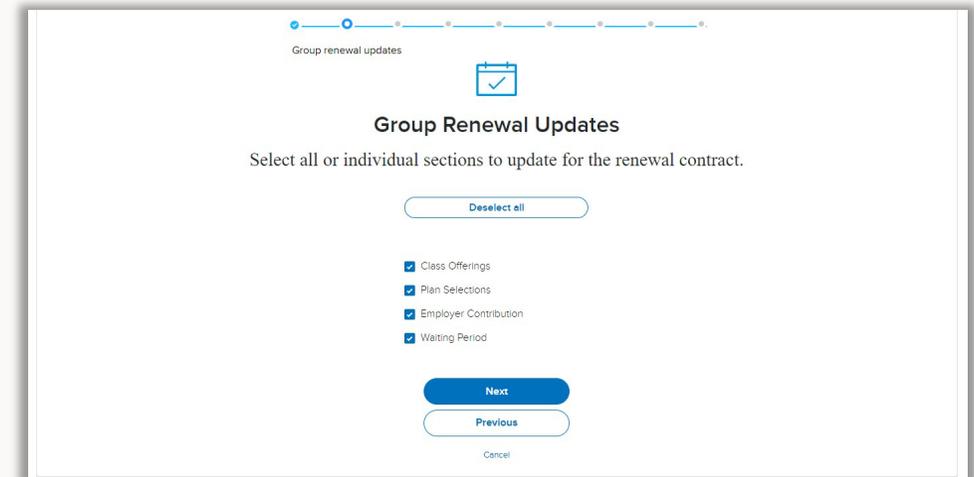
Select all

- Class Offerings
- Plan Selections
- Employer Contribution
- Waiting Period

Next

Previous

Cancel



Group renewal updates

**Group Renewal Updates**

Select all or individual sections to update for the renewal contract.

Deselect all

- Class Offerings
- Plan Selections
- Employer Contribution
- Waiting Period

Next

Previous

Cancel

# 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

### Class Offerings

Make changes to the enrollment classes offered by the group  
Check the box to select an available class to be added to the group.  
Classes already offered cannot be re-selected.

The group currently offers the classes listed in the table

ACTIVE CA ELIGIBLES
ACTIVE OOS ELIGIBLES

Select the button in the below list of available classes to add a new class to the group. You do not need to select the classes already offered.

Active out of state employees  
 COBRA California members  
 COBRA out of state members

No changes are needed

# Renewal - plan adds and cancels

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

## Plans Adds

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

## Plan cancels

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

**Select Dental Coverage**  
Make the group plan selections

To add a plan, select the plan package or option to view the networks and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the blue Cancel link in the renewal plan table. Select and use the arrows to move the plan name into the canceled plan label.

Renewal Plans

Diamond DPPO/\$3000/U95/Adult-Child Ortho  
Gold DPPO/\$2000/U90/Adult-Child Ortho  
[Cancel Plans](#)

Select Dental Plan Option \*

Single Dual Choice Triple Choice

No changes are needed

Renewal Plans

Canceled Plans

Diamond DPPO/\$3000/U95/Adult-Child Ortho  
Gold DPPO/\$2000/U90/Adult-Child Ortho

Select Dental Plan Option \*

Single Dual Choice Triple Choice

**AVAILABLE PLANS**

▼ Dental HMO Plan

Dental HMO Basic  
 Dental HMO Plus  
 Dental HMO Deluxe  
 Dental HMO Voluntary  
 Dental HMO Standard

▼ Dental PPO Plan

Bronze DPPO/\$1500/MAC  
 Bronze DPPO/\$1500/MAC/Child Only Ortho  
 Gold DPPO/\$1500/MAC  
 Gold DPPO/\$1500/MAC/Adult-Child Ortho  
 Gold DPPO/\$2000/MAC  
 Gold DPPO/\$2000/MAC/Adult-Child Ortho  
 Bronze DPPO/\$1000/MAC

# 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.

**Employer Contribution**  
Make changes to the contribution amounts.

Check the box to indicate which product's contribution fields changing. Select the contribution type and enter the new amount. Required fields must be completed and before moving forward.

▼ Employer Contributions

Choose the details you would like to modify

Medical

**Medical** 1 Subscriber Contribution

\$ % Enter a number\*  
100

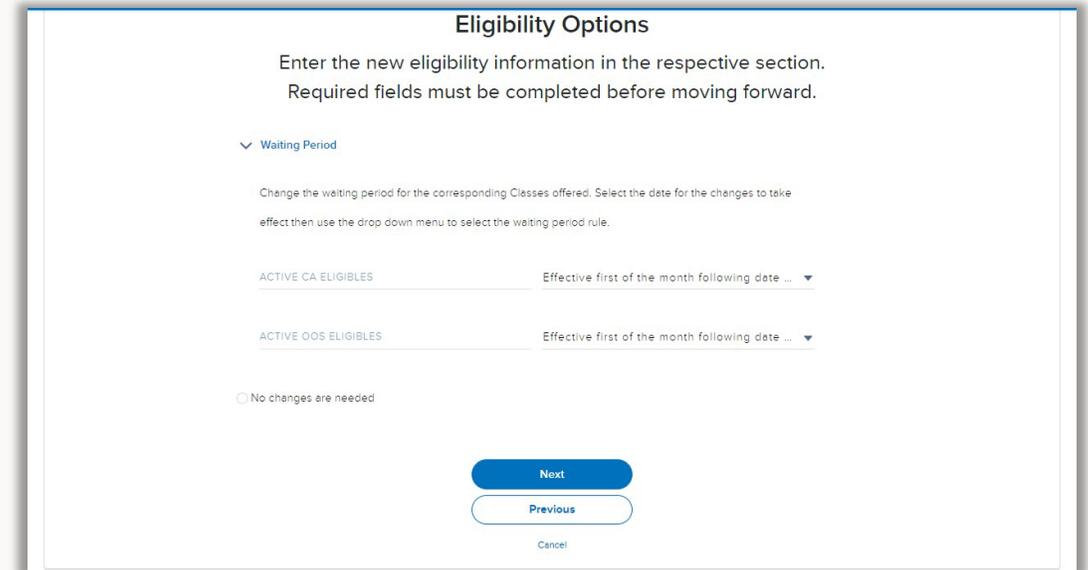
Dependent Contribution

\$ % Enter a number\*  
0

No changes are needed

# Renewal - waiting period

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



The screenshot shows a web form titled "Eligibility Options". At the top, it says "Enter the new eligibility information in the respective section. Required fields must be completed before moving forward." Below this is a section for "Waiting Period" with a dropdown arrow. A note reads: "Change the waiting period for the corresponding Classes offered. Select the date for the changes to take effect then use the drop down menu to select the waiting period rule." There are two rows of input fields: "ACTIVE CA ELIGIBLES" and "ACTIVE OOS ELIGIBLES", each followed by a date dropdown menu labeled "Effective first of the month following date ...". At the bottom, there is a radio button for "No changes are needed" and three buttons: "Next" (blue), "Previous" (white with blue border), and "Cancel" (small text).

# 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

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

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

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

Action menu for row 2:  
Start Renewal  
Start Open Enrollment - Existing Members  
Start Open Enrollment - Enroll Employees  
Run a Quote

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

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

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

Action menu for row 2:  
Start Renewal  
Start Open Enrollment - Existing Members  
Start Open Enrollment - Enroll Employees  
Run a Quote

# 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.

Renewal Information

### It's time to renew

Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.

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

Current Year		Renewal Year	
No of employees	9	No of employees	9
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Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

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

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

[Download Member Roster](#)

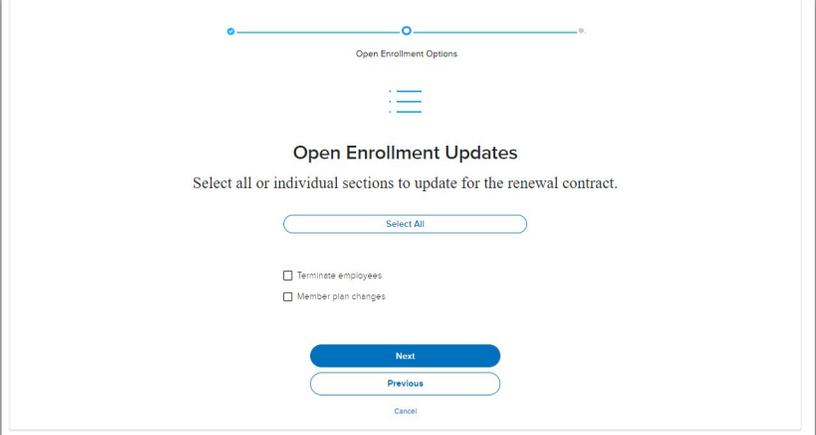
If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

# Open Enrollment existing employees - select the changes

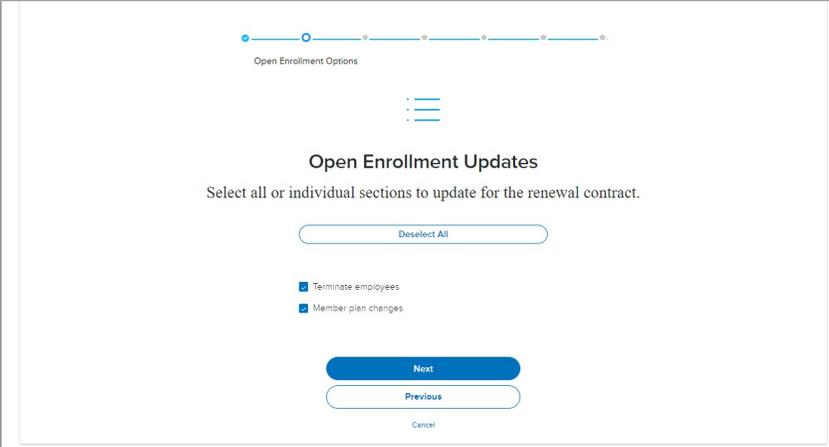
Your clients are unique and so are their renewal needs. So instead of a one size fits all renewal workflow, we built a customizable workflow so you can address key changes and skip unnecessary steps.

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.



The screenshot shows the 'Open Enrollment Updates' screen. At the top, there is a progress indicator with a blue dot on the first step. Below it, the text 'Open Enrollment Updates' is displayed, followed by the instruction 'Select all or individual sections to update for the renewal contract.' A 'Select All' button is highlighted in blue. Below this, there are two checkboxes: 'Terminate employees' and 'Member plan changes', both of which are currently unchecked. At the bottom, there are three buttons: 'Next' (highlighted in blue), 'Previous', and 'Cancel'.



The screenshot shows the 'Open Enrollment Updates' screen. At the top, there is a progress indicator with a blue dot on the first step. Below it, the text 'Open Enrollment Updates' is displayed, followed by the instruction 'Select all or individual sections to update for the renewal contract.' A 'Deselect All' button is highlighted in blue. Below this, there are two checkboxes: 'Terminate employees' and 'Member plan changes', both of which are currently checked. At the bottom, there are three buttons: 'Next' (highlighted in blue), 'Previous', and 'Cancel'.

# 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

The screenshot shows the 'Enter Terminations' interface. At the top, there are two buttons: 'Enter Terminations' (highlighted) and 'Upload File'. Below these are four input fields: 'Termination Date', 'Benefit end date', 'Cancel Reason' (with a dropdown menu), and 'CalCOBRA Eligible' (with a dropdown menu). A blue button labeled 'Apply to all Selected Employees' is positioned below these fields. The main section features a search bar for 'Member Name' and 'Member ID' (with '1234' entered). Below the search bar is a table with columns: Member Name, Member ID, Termination Date, Benefit End Date, Cancel Reason, CalCOBRA Eligible, and CalCOBRA Eligible Reason. The first row shows 'Member A' with ID '123456789'. A 'Next' button is at the bottom right, and a 'Cancel' link is below it.

This screenshot shows the same 'Enter Terminations' interface as above, but with a calendar open for the 'Termination Date' field. The calendar is for the month of May 2024, with the 8th selected. The table below shows three members: 'Member A', 'Member B', and 'Member C', all with ID '123456789'. The 'Member A' and 'Member B' rows have their checkboxes checked. The 'Cancel Reason' and 'CalCOBRA Eligible' dropdowns are visible for each row. At the bottom, there are 'Previous' and 'Next' navigation buttons.

# 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

The image displays two overlapping screenshots. The top screenshot shows the 'Terminate Employees' web interface from Blue Shield of California. It features a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. The main content area has a title 'Terminate Employees' and a sub-header 'Cancel coverage for multiple employees at once. Any dependents associated with the employees will also be canceled from coverage.' Below this is a large white box with an 'Upload Files' button and the text 'Or drop files'. At the bottom, there are two buttons: 'Enter Terminations' and 'Upload File'.

The bottom screenshot shows a Microsoft Excel spreadsheet titled 'BlueShield\_EET\_MassTermination (4)'. The spreadsheet has a header row with the following columns: 'Member Name', 'Member ID', 'Termination Date', 'Cancel Reason', 'CalCOBRA Eligible', and 'CalCOBRA Eligible Reason'. Below the header, there are ten rows of data, each representing a different employee (Name A through Name I). The data includes member IDs (all 123456789), termination dates (ranging from 04/30/2024 to 05/30/2024), and reasons for termination (such as 'Military Active Duty', 'Cancel Per Request', and 'Termination of Employment'). The 'CalCOBRA Eligible' column contains 'Yes' or 'No' values, and the 'CalCOBRA Eligible Reason' column contains 'Termination or Resignation'.

Member Name	Member ID	Termination Date	Cancel Reason	CalCOBRA Eligible	CalCOBRA Eligible Reason
Name A	123456789	04/30/2024	Military Active Duty	No	
Name B	123456789	04/30/2024	Cancel Per Request	Yes	Termination or Resignation
Name C	123456789	04/30/2024	Cancel Per Request	Yes	Termination or Resignation
Name D	123456789	04/30/2024	Cancel Per Request	No	
Name E	123456789	04/30/2024	Cancel Per Request	No	
Name F	123456789	04/30/2024	Termination of Employment	Yes	Termination or Resignation
Name G	123456789	03/31/2024	Termination of Employment	Yes	Termination or Resignation
Name H	123456789	05/30/2024	Termination of Employment	Yes	Termination or Resignation
Name I	123456789	05/30/2024	Termination of Employment	Yes	Termination or Resignation

# 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

**Move impacted subscribers to new plans**

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

ACTIVE CA ELIGIBLES Plans Actions

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

**Move impacted subscribers to new plans**

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

ACTIVE CA ELIGIBLES Gold Trio HMO 1500/35 OffEx Actions

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

[Assign Plans](#)  
[Reset](#)  
[Clear All](#)

# 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

The screenshot displays the 'Enroll Employees' tool interface. At the top, it says 'Upload Employee Enrollment File' with a 'Download Employee Census Template' link. Below this are 'Clear All' and 'Upload Employee Enrollment File' buttons. An inset window shows a Microsoft Excel spreadsheet titled 'Enroll Employee' with columns for Group Name, Group Tax ID, Group Address, Group Contact, and Group Contact Phone. The spreadsheet is divided into sections: 'Application Information', 'Subscriber Information', and 'Section 1a - Health plan selection'. A legend indicates required, optional, not required, and incorrect values. An 'Export to .CSV' button is visible. Below the spreadsheet, a summary table shows the following data:

Employee Only	Employee + Spouse	Employee + Child	Employee + Family	Total Employees Added	Total Members Added
0	1	1	0	2	4

Below the summary table are 'Clear All' and 'Upload Employee Enrollment File' buttons. A table below that shows the preview of the uploaded file:

Employee Name	Number of Dependents	Products Enrolled	Edit Subscriber	Remove Subscriber
Waldo A	1		<a href="#">View Details</a>	
Carmen S	1		<a href="#">View Details</a>	

At the bottom, it says 'Showing results 1-2 of 2'.

# 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

Employee Only	Employee + Spouse	Employee + Child	Employee + Family	Total Employees Added	Total Members Added
0	1	0	0	1	2

Clear All      Upload Employee Enrollment File

Employee Name	Number of Dependents	Products Enrolled	Edit Subscriber	Remove Subscriber
Carmen S	1		View Details	

### Employee Enrollment Information

> Other Health Plan Information

> Dependent Details

> Wanda

> Plan Selections

Waldo A	Medical	Primary Care Provider
	Silver Full PPO 2350/70 OffEx	
	Dental	Primary Care Dentist
		777666545
	Vision	Life
		Dependent Life

Cancel      Save

# Exception reviews

If a submission requires a document or Blue Shield review, a screen will display in the work flow prompting you for the exact information required.

If you do not have a required document on-hand, use the Will upload later check box and click next. It is important to complete the transaction even if the document is provided at a later time.

### Exception Review

**The current transaction contains an exception and needs to be reviewed by Blue Shield before processing it. We will send status communications to the email on file for this account.**

**Enter the exception reason in the field below. As an added option, upload documentation to help support this exception request by clicking on the document upload button to search and attach the document. Note that documents are not required at this time.**

EXCEPTIONS	DOCUMENTS NEEDED
Group name update requested	1. IRS documentation of new name and EIN, or IRD or SS-4. 2. Proof of name change showing old and new name, as follows: a. Amendment and/or Conversion document, filed with CA Secretary Of State (Corporations, Partnerships, LLC only) and/or b. Fictitious Business Name (FBN) statement, filed with county (Sole Proprietor, or DBA changes)

Reason for submitting this exception request:

 Enter the exception reason before moving to the next screen

Upload Supporting Documents

Or drop files

Will Upload Later

 Blue Shield cannot begin the review process until documents are provided.

# Upload documents for exceptions

Some submissions fall under an exception and needs to be reviewed by a Blue Shield team.

The tool will prompt users during the submission if there is an exception.

The screen will display what was captured and if any supplemental documents are needed and what those documents are.

Users can upload the requested documents on this screen:

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

Users can check a box to upload documents later:

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

# 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.

The screenshot displays two main sections: 'Enrollment Progress' and 'To Do'. The 'Enrollment Progress' section features a donut chart and six status categories with their respective counts and effective dates:

Status	Count	Effective Dates
Not yet started	1	1/1/20, 3/1/20, 5/1/20
In Progress, not submitted	1	1/1/20, 3/1/20
Submitted, requires broker action	1	1/1/20, 3/1/20
Submitted Pending UW Review	1	1/1/20, 3/1/20
Approved BSC Finalizing	1	1/1/20, 3/1/20
Enrolled	1	1/1/20, 3/1/20

The 'To Do' section, highlighted with a blue border, lists several tasks with links to complete them:

- Jane Florist - [Quote Expiring Soon](#)
- Will's Bakery - [Complete Enrollment](#)
- Mikes Bikes - [Complete Enrollment](#)
- South Pacific Company - [Documents Required](#)
- Cupid's Cupcakes - [Documents Required](#)
- Ana's Housekeeping - [Documents Required](#)
- Jacks Pizza Pie's - [Documents Required](#)
- Jack's Store - [Additional Documents Required](#)
- Montana Nails - [Additional Documents Required](#)

A 'View More' link is located at the bottom of the 'To Do' list. A blue arrow points from the 'To Do' section down to a detailed task view.

The detailed task view shows a task titled 'Documents Required' with a 'Mark Complete' button. The task name is 'Documents Required' and it is related to ID '00001063'. There is an 'Upload Documents' button. The task is assigned to 'Jane Broker' and the account is 'CM video test'.

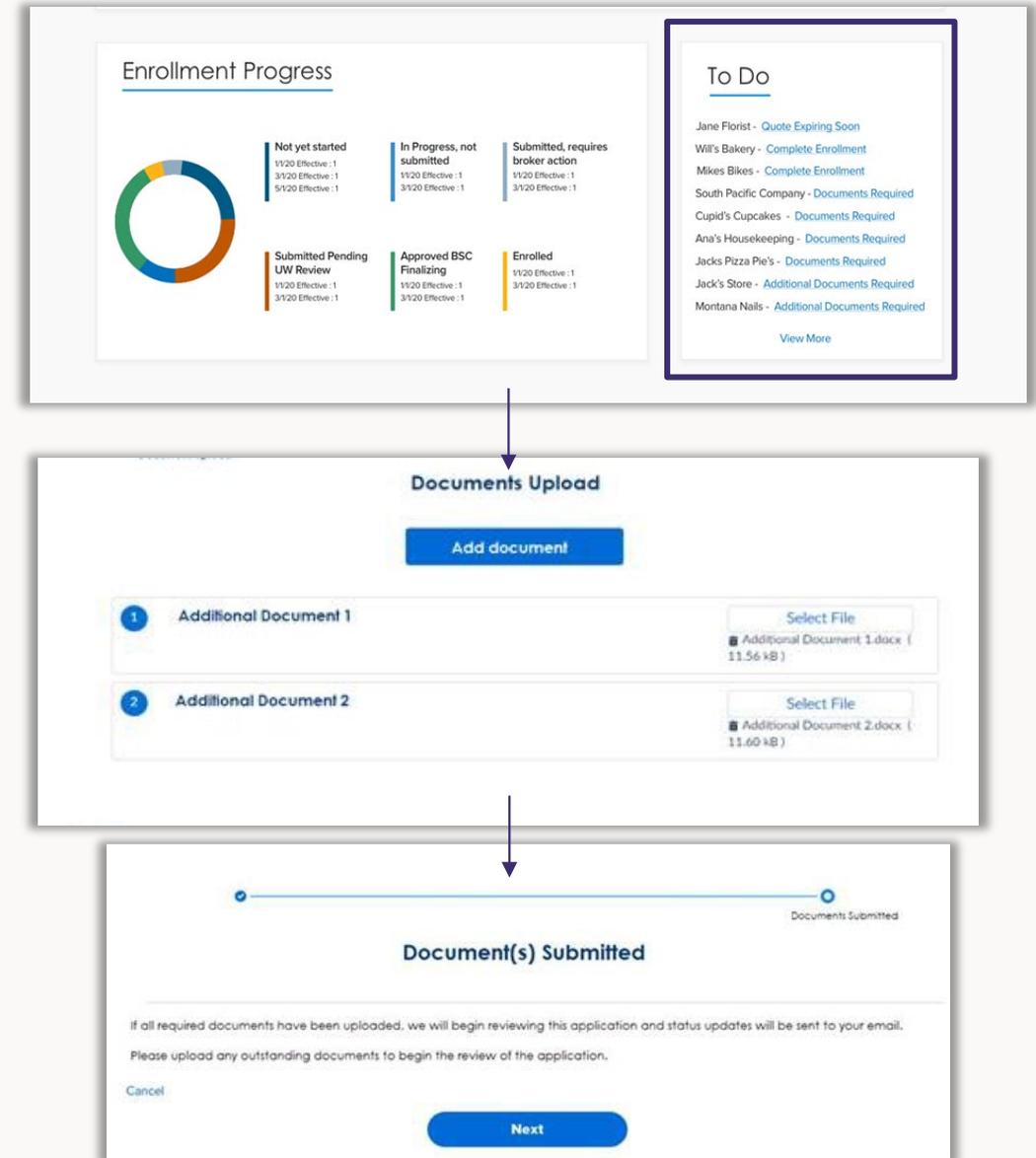
# Document upload

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

- How to view and export **94-97**
- Reports available **98**

# Report folder

Reports  
All Folders  
2 items

REPORTS	Name	Created By	Created On	Last Modified By
Recent	Producer Reports Folder	Jeremy Carlson	1/9/2023, 5:09 PM	Jeremy Carlson
Created by Me	SG Broker Portal	Jeremy Carlson	4/28/2020, 12:56 PM	Jeremy Carlson
Private Reports				
All Reports				
FOLDERS				
All Folders				
Created by Me				
Shared with Me				
FAVORITES				
All Favorites				

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

# Report folder

blue  of california

Search... House Broker ▾

HOME MY GROUPS MY REPORTS RESOURCES ▾

Reports  
All Folders > Producer Reports Folder Search all folders... New Report ⚙

16 items

REPORTS	Name	Description ▾	Folder	Created By	Created On ▾	Subscribed
Recent	Contracts with Quotes		Producer Reports Folde	Jeremy Carlson	2/7/2023, 2:34 PM	▾
Created by Me	Book of Business This Calendar Year		Producer Reports Folde	Jeremy Carlson	3/31/2023, 4:28 PM	▾
Private Reports	Terminated Groups This Year		Producer Reports Folde	Jeremy Carlson	3/31/2023, 4:56 PM	▾
All Reports	Applicants Refusing Coverage		Producer Reports Folde	Jeremy Carlson	3/31/2023, 5:08 PM	▾
FOLDERS	All Folders		Producer Reports Folde	Jeremy Carlson	4/2/2023, 4:32 PM	▾
Created by Me	Cobra/CalCobra Summary		Producer Reports Folde	Jeremy Carlson	4/2/2023, 4:32 PM	▾
Shared with Me	Dependents Created Last Week		Producer Reports Folde	Jeremy Carlson	2/6/2023, 12:18 PM	▾
FAVORITES	Subscribers Created Last Week		Producer Reports Folde	Jeremy Carlson	4/3/2023, 5:54 PM	▾
All Favorites	Census Members Last Week		Producer Reports Folde	Jeremy Carlson	2/3/2023, 9:28 PM	▾

Next, select the report from the available list.

# Editing reports

Report: Census with Census Member Plans  
**Member Census**

⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records  
24,377

Group: Account Name	Subscriber Id	Name	Applicant Type	Group Census Member Plan Name	Plan Effective Date	SubGroup ID
A.L. GILBERT COMPANY (412)	53000179D (1)	ALAN S WELCH	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						
	53000208D (5)	JOSEPH O ROCHA	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		CHRISTINA ROCHA	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		BRAYDEN ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		GRAYSON ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		CARTER ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						
	53000217D (2)	OSCAR PONCE	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		MARIA ALBA DE PONCE	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						
	53000455D (2)	FERNANDO S ORTEGA	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		YELILA ORTEGA	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						

Row Counts  Detail Rows  Subtotals  Grand Total

**Filters**

- Show Me: All census
- Effective Date: All Time
- Group: Account Name: contains ""
- Type: equals System

Report: Census with Census Member Plans  
**Member Census**

⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records  
24,377

Group: Account Name	Subscriber Id	Name	Applicant Type	Group Census Member Plan	Plan Effective Date	SubGroup ID
A.L. GILBERT COMPANY (412)	53000179D (1)	ALAN S WELCH	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						
	53000208D (5)	JOSEPH O ROCHA	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		CHRISTINA ROCHA	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		BRAYDEN ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		GRAYSON ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		CARTER ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						
	53000217D (2)	OSCAR PONCE	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		MARIA ALBA DE PONCE	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						
	53000455D (2)	FERNANDO S ORTEGA	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		YELILA ORTEGA	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
Subtotal						

Row Counts  Detail Rows  Subtotals  Grand Total

**Filter by Group: Account Name**

Operator: contains

bg

Use relative value

Cancel Apply

**Filters**

- Show Me: All census
- Effective Date: All Time
- Group: Account Name: contains ""
- Type: equals System

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

Report: Census with Census Member Plans  
**Member Census**

Enable Field Editing | Search | Add Chart | [Dropdown] | [Refresh] | Edit [Dropdown]

⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records  
24,377

<input type="checkbox"/> Group: Account Name ↑	<input type="checkbox"/> Subscriber Id ↑	Name	Applicant Type	Group Census Member Plan Name	Plan Effective Date	SubGroup ID
<input type="checkbox"/> A.L. GILBERT COMPANY (412)	53000179D (1)	ALAN S WELCH	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
	<b>Subtotal</b>					
	53000208D (5)	JOSEPH O ROCHA	Subscriber	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		CHRISTINA ROCHA	Spouse	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000
		BRAYDEN ROCHA	Dependent Child	SAPLUSPPO_2_A L Gilbert Company C124	1/1/2023	1000

**Filters**

- Show Me: All census
- Effective Date: All Time
- Group: Account Name contains ""
- Type equals System

Save As | Export

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 cancellation 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

The screenshot shows the 'My Calculator' section of a web application. The top navigation bar includes 'HOME', 'MY GROUPS', 'MY REPORTS', 'MY CALCULATOR' (which is highlighted), and 'RESOURCES' with a dropdown arrow. Below the navigation bar, there are four tabs: 'OVERVIEW' (highlighted), 'NEW HIRE EFFECTIVE DATE', 'NEWBORN EFFECTIVE DATE', and 'MEMBER CANCEL EFFECTIVE DATE'. The main content area contains the following text:

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.

The screenshot shows the 'NEW HIRE EFFECTIVE DATE' tab of the 'My Calculator' tool. The interface includes a navigation bar with tabs for 'OVERVIEW', 'NEW HIRE EFFECTIVE DATE', 'NEWBORN EFFECTIVE DATE', and 'MEMBER CANCEL EFFECTIVE DATE'. The main form area contains several input fields: 'Business Segment' (a dropdown menu), 'Transaction Date' (a date field with a calendar icon), 'Hire Date' (a date field with a calendar icon), 'Retro Guidelines' (a dropdown menu), and 'Waiting Period' (a dropdown menu). A blue 'Calculate' button is positioned below these fields. At the bottom left, there is a light blue box labeled 'Your Effective Date'. On the right side, there is a 'Help' section with 'Instructions' and 'Help' sub-sections. The 'Instructions' section states: 'Select the line of business and provide the required information. Click on the Calculate button and view the effective date in the blue box. To adjust or run another calculation, change the information in the desired fields and click the Calculate button again. The new effective date will display in the blue box.' The 'Help' section includes links to 'Group Account Page' and 'Administrator's Guide'.

## 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](#)

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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