



**BlueCross BlueShield  
of Texas**

# Small Group Enrollment Tool User Guide

Version 1.0 | 2021 | Confidential



*For Producers and General Agents*

**Effective November 2021**

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## Purpose

The purpose of this user guide is to provide step-by-step instructions and guidance to Producers and General Agents (GAs) as they enroll their groups using the enhanced eSales Small Group Enrollment tool.



**Important:** We encourage Producers to use the eSales Small Group Enrollment tool. Enrolling groups through this tool and submitting clean cases eliminates some internal processing steps thus improving the turnaround time from quote to approval.

## Overview of the Enrollment Process

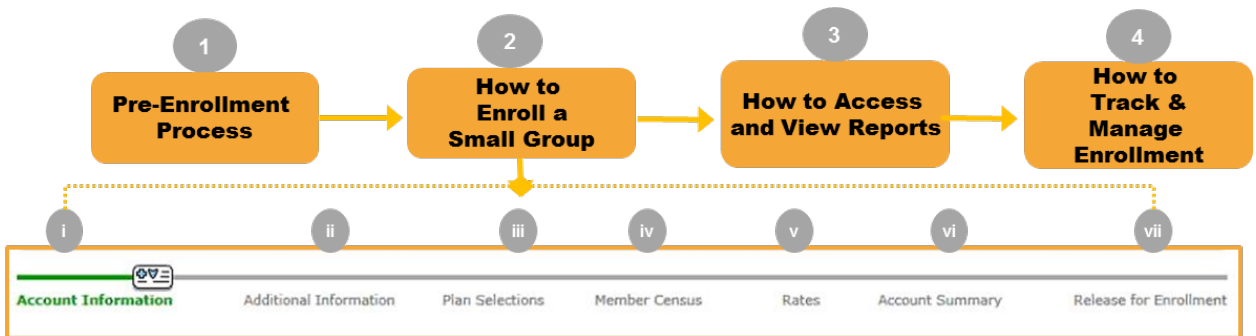
The eSales Small Group Enrollment tool enables you to enroll your groups online in a user-friendly, efficient step-by-step process. You can enter the required information and upload the necessary documents to release your group for enrollment, initiating underwriter review. Within this portal, you can enter account and additional group information; select medical, dental and life plans; enter the member census; view rates; review the account summary, print and verify all information with your client; upload all required documentation to release the case for enrollment. You can also view the relevant reports.

The enhanced online tool helps to streamline and automate the enrollment process. It provides faster turnaround time for an enrollment from review to final decision. You can track the status of the case online and keep your clients updated on the enrollment status.

Let's review the steps to enroll a small group (1-50 employees) using the eSales Small Group Enrollment tool.

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# Overview of the Enrollment Process (Contd.)



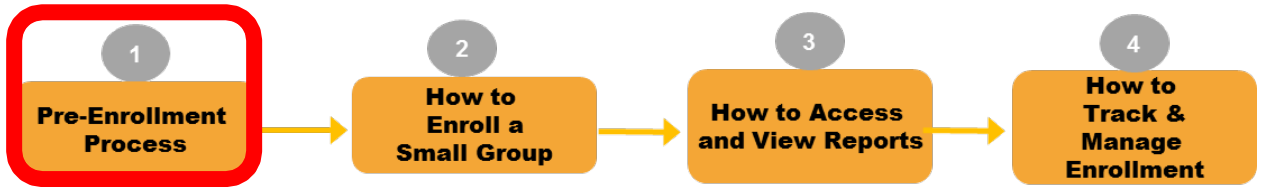
Once you have gathered the necessary information and documentation from your client, you access the eSales Small Group Enrollment tool to enter all required information to release the group for enrollment. This initiates the Underwriting review process. To successfully enroll your group online, follow the steps outlined in this user guide.

## Steps to Enroll a Small Group:

1. Pre-Enrollment Process
2. How to Enroll a Small Group
  - i. Account Information
  - ii. Additional Information
  - iii. Plan Selections
  - iv. Member Census
  - v. Rates
  - vi. Account Summary
  - vii. Release for Enrollment
3. How to Access and View Reports
4. How to Track and Manage Enrollment
  - i. Enrollment Status
  - ii. More Information Required
  - iii. Underwriting Approval Received
  - iv. My Enrollments

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# 1 Pre-Enrollment Process



Let's begin the online enrollment process. First, you must logon to the Blue Access for Producers (BAP) or the Producer Portal and navigate to the eSales Tools home page.

## Accessing the eSales Small Group Enrollment Tool

A new link has been added to the eSales Tool's home page. At this time, it is recommended to use Internet Explorer or Google Chrome web browsers to access the Enrollment tool.

After you create a quote using the **eSales quoting application**, you return to the eSales Tools Home page, and click **Small Group & Middle Market Enrollment** link to begin the enrollment process.

BlueCross BlueShield of Texas

For Our Producers  
www.bcbstx.com/producer

eSales Tools

Home

Welcome to eSales Tools

Logged In: JUAN NAVARRO  
Last Access: 2021-05-06 01:39 PM

**E-Sales Tools Links**

- Request Center
- Small Group & Middle Market Quoting
- Plan Benefits and Rates
- Medical Preliminary Request
- Small Group & Middle Market Enrollment
- Benefit Plans
- BlueTrack<sup>SM</sup>
- Small Group Renewals

**Request Center**

- Submit required documentation for New Business Group Enrollments
- Submit required documentation for ASO Blue Balance Funded<sup>SM</sup> Quotes (10 - 50) in TX only

**Alert:** Request Center should not be used by producers enrolling new groups through the Small Group & Middle Market Enrollment on-line system.

**Medical Preliminary Request**

Submit medical information to Underwriting for small groups and receive an early assessment

**BlueTrack<sup>SM</sup>**

To track the progress of your enrollment applications

**Small Group & Middle Market Quoting**

- Metallic Plans for Small Group Prospects with 50 or fewer total employees
- ASO Blue Balance Funded<sup>SM</sup> Group prospects for 10-50 enrolled employees
- Standard Insured Plans for Middle Market Prospects with 51+ total employees

**Plan Benefits and Rates**

A new tool for accessing Member Level Rates after 01/01/2014

**Small Group & Middle Market Enrollment**

- Metallic Plans for Small Group Prospects with 50 or fewer total employees
- Standard Insured Plans for Middle Market Prospects with 51+ total employees

**Benefit Plans**

Product Benefit Summaries for Small Groups (2-50) and Middle Markets (51-150) in PDF format

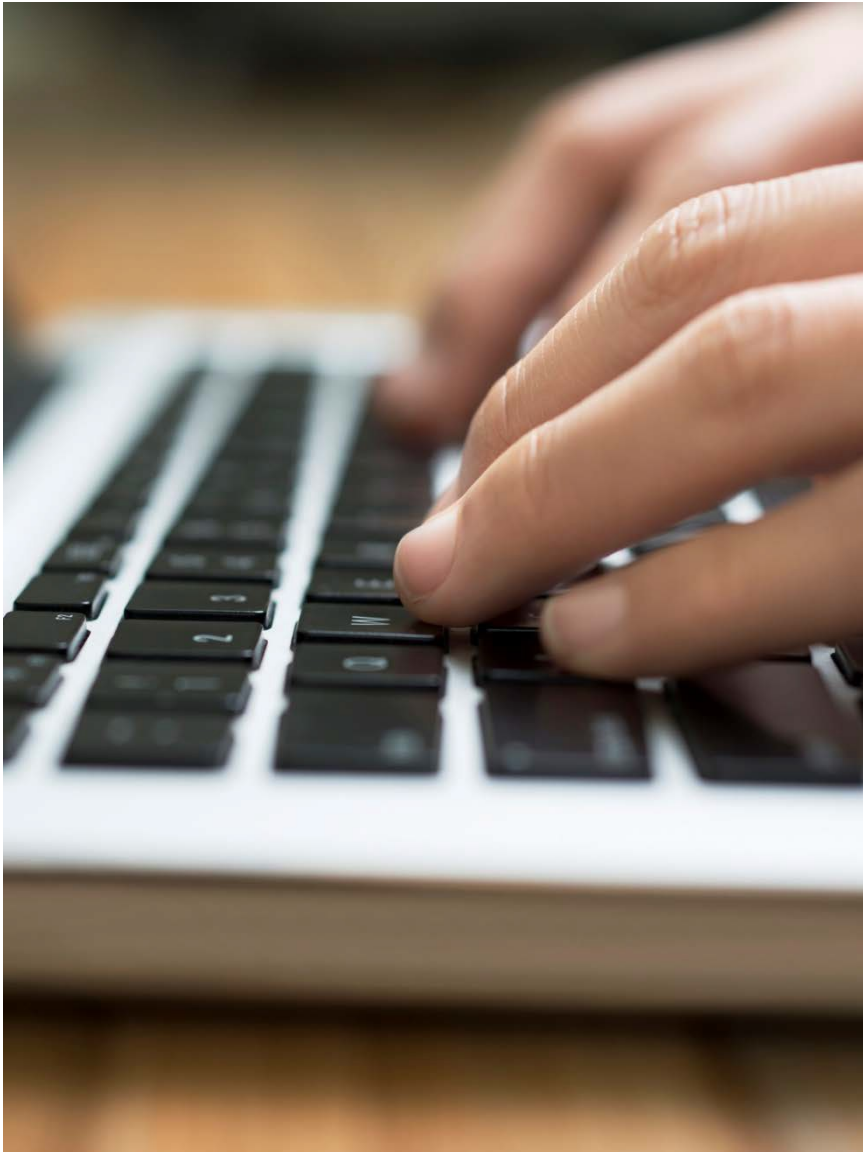
**Small Group Renewals**

Produce Small Group Renewal documents

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## Enrollment with a Quote

Steps to start an enrollment process  
using a quote in eSales Tools.

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# 1 Pre-Enrollment Process (Contd.)

## Enrolling with a Quote

Once you have logged on to the producer portal and clicked the **Small Group Enrollment** link within the eSales Tools, you can start the enrollment process.

From the Enrollment home page, you can now enroll a small group with a quote and without a quote.

**Enrollment** Enrollment Home

**Search Existing Accounts/Quotes** ▼

Search by Quoted status to start enrolling a quoted prospect, or **Start SG Enrollment without a Quote**

Account Name:  Quote Number: 1149625 Status: Quoted ▼  
 Agent:  Account Number:  Effective Date:   
 Division: Texas Case ID:  Market Segment: All ▼  
 EIN:

**Search** Clear

1 - 1 of 1

Prospect	Effective Date	Agent	Sales Executive	Market Segment	Quote #
<b>Start Enrollment</b> AMATEST EXT QUOTE	04/01/2021	JUAN NAVARRO		SG	1149625

To enroll with a quote;

1. Search for the quote using the Quote Number or any portion of the Account Name.
2. From the **Status** drop-down list, select **Quoted**.
3. Click **Search** or hit the **Enter** key on the keyboard.
4. After you find your required quote, click **Start Enrollment**.

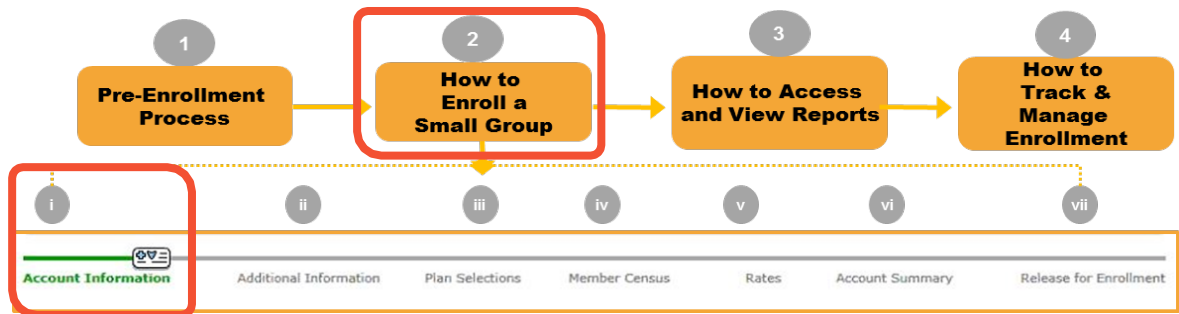
### Note:

- Search by **Pre-Enrollment** only if returning to a case that is already in the enrollment process.
- Enrolling cases that have not been released for enrollment review will be auto discontinued by the system 60 days from the effective date.

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## 2 How to Enroll a Small Group

### I. Account Information



### Overview of Functionality and Navigation

On each screen of the enrollment tool, you see a progress bar that highlights the current step or screen in green. We have used the same progress bar to walk you through this user guide.

The screenshot shows the Enrollment tool interface. The top bar displays 'Enrollment' and 'Enrollment Home'. Below, account details are shown: Account Name: TX\_UG, Market Segment: Small Group, Account Number: 190796, Effective Date: 01/01/2018, Producer: ITG Test Broker2, Status: Pre-enrollment, Quote Number: 807754, Case ID: 13464, and EFT Status: Not Processed. A navigation bar contains buttons for Reports, Documents List, Attachments, Log (highlighted with a red box), and History. A Discontinue button is also visible.

#### Step i: Account Information

After you start enrollment using the quote, the **Account Information** screen is displayed. At the top of each screen, you see these buttons:

- **Reports:** Opens a list of available reports.
- **Documents List:** Opens a list of required documents.
- **Discontinue:** Allows users to discontinue a case any time throughout the enrollment process.
- **Attachments:** Allows users to attach the required documents. This functionality will be discussed in more detail later in the training.
- **Log:** Real Time entries can now be made by the producer up until Underwriter approval. The internal user will receive notification of log entries.

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## 2 How to Enroll a Small Group (Contd.)

### I. Account Information (contd.)

On this screen, enter the information in the required fields. All fields marked with an asterisk (\*) are required. Some data is already populated in the fields.

Account Information
Additional Information
Plan Selections
Member Census
Rates
Account Summary
Release for Enrollment

Continue

**General Information**

*Employer's Legal Name: <input type="text" value="AMATEST_IL GAnew"/>	*Does this group cover domestic partners?: <input type="radio"/> Yes <input checked="" type="radio"/> No
*Employer ID Number (EIN): <input type="text" value="654066668"/>	*Is Group subject to COBRA?: <input type="radio"/> Yes <input checked="" type="radio"/> No
*SIC Code: <input type="text" value="0111"/> -Wheat farms	
*Policy Effective Date: <input type="text" value="07/01/2021"/>	
*Case Submitted to BCBS: <input type="text" value="04/22/2021"/>	
Sales Rep. D/C: <input type="text" value="265"/> / <input type="text" value="663"/>	

**Blue Access for Employers (BAE)**

Contact Name: <input type="text"/>	Contact Title: <input type="text"/>
Phone (numbers only): <input type="text"/> Ext. <input type="text"/>	E-Mail Address: <input type="text"/>

**Employee Retirement Income Security Act (ERISA)**

\*ERISA Regulated Group Health Plan :  Yes  No

**Physical Address/Contact Information**

**ⓘ Please refer to the USPS website to confirm accurate address information. [Visit USPS](#)**

*Address 1: <input type="text" value="920 CURTISS ST"/>	Address 2: <input type="text"/>
*City: <input type="text" value="DOWNERS GR"/>	State: <input type="text" value="Illinois"/>
*Zip Code: <input type="text" value="60515"/>	*County: <input type="text" value="Dupage"/>
*E-Mail Address of Authorized Company Official: <input type="text" value="niharika_mula@bcbstx.com"/>	Secondary E-Mail Address: <input type="text"/>
*Phone (numbers only): <input type="text" value="3265224522"/> Ext. <input type="text"/>	Fax (numbers only): <input type="text"/>
*Administrative Contact: <input type="text" value="DFCF"/>	Contact Title: <input type="text"/>
*Different Billing Address?: <input type="radio"/> Yes <input checked="" type="radio"/> No	*Different Mailing Address?: <input type="radio"/> Yes <input checked="" type="radio"/> No

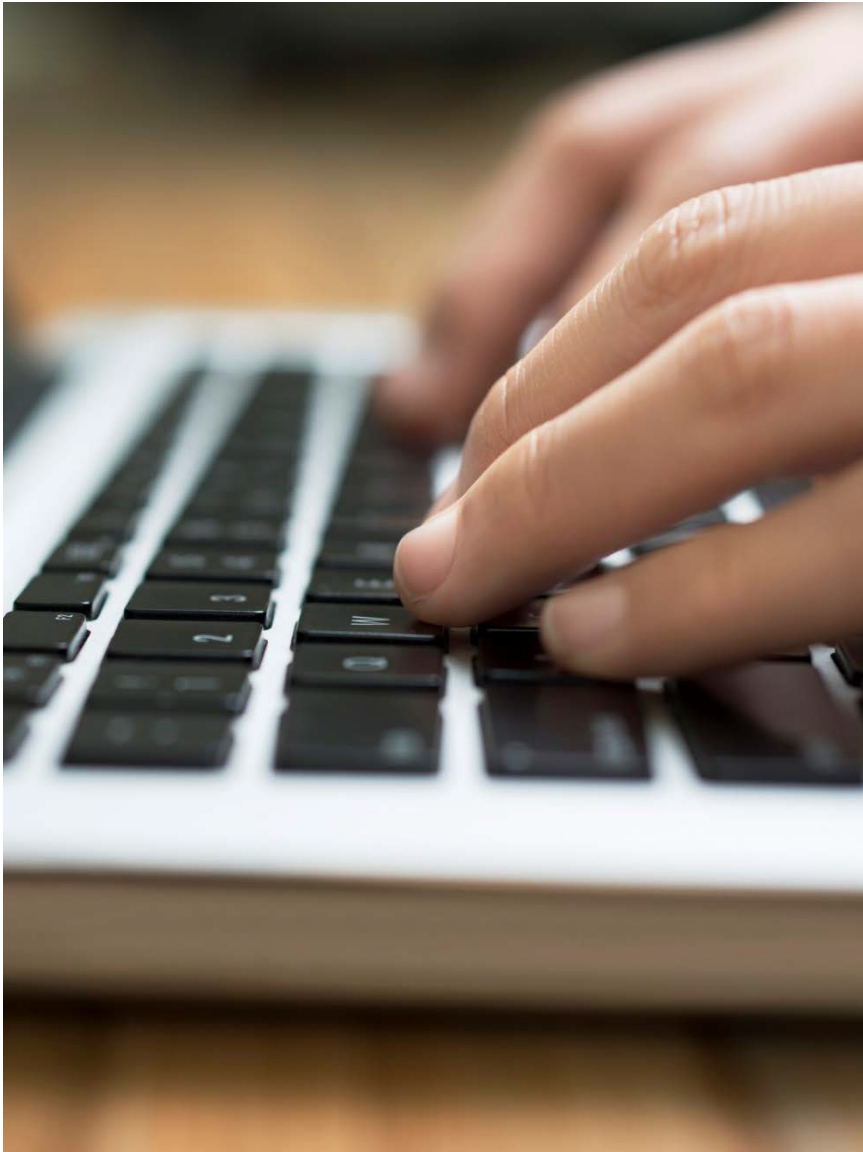
**Producer Information**

**Primary Producer**

*Primary Producer Name: <input type="text" value="TEST JORDAN TAGGART"/>	<input type="button" value="Clear"/>
*Tax ID/SSN: <input type="text" value="111222333"/>	*Producer #: <input type="text" value="000625829"/>
*E-Mail Address: <input type="text" value="niharika_mula@bcbstx.com"/>	*Confirm E-Mail Address: <input type="text" value="niharika_mula@bcbstx.com"/>
Telephone #: <input type="text" value="1112223333"/>	Complete Address: <input type="text" value="300 E Randolph"/>
Fax #: <input type="text"/>	

**⚠ Please reach out to your Sales Representative if there are multiple producers involved and commissions need to be split.**

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## Enrollment without a Quote

Steps to start an enrollment process without a quote in eSales Tools.

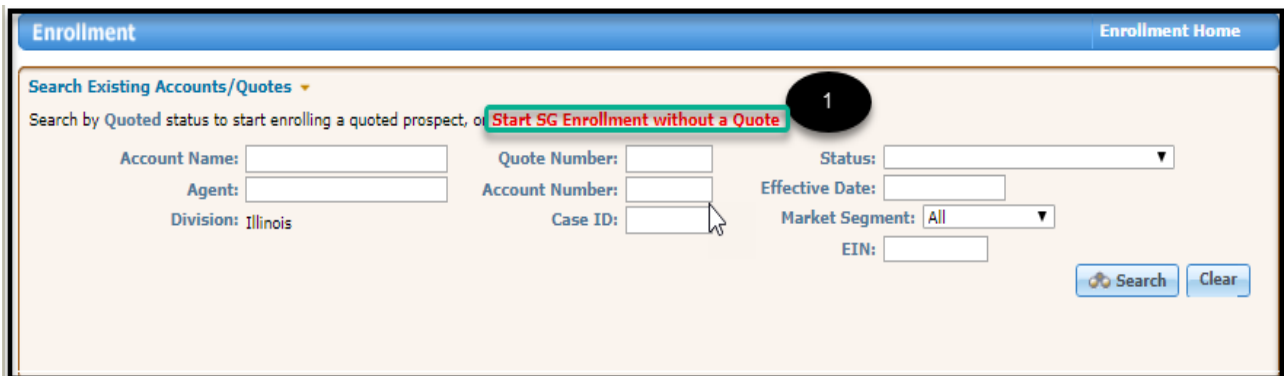
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# 1 Pre-Enrollment Process (Contd.)

## Enrolling without a Quote

You can also start the enrollment process without a quote.

1. Click **Start Enrollment without a Quote**.



The screenshot shows the 'Enrollment' search interface. At the top, there is a blue header with 'Enrollment' on the left and 'Enrollment Home' on the right. Below the header, there is a search section titled 'Search Existing Accounts/Quotes'. The text below this title reads 'Search by Quoted status to start enrolling a quoted prospect, or **Start SG Enrollment without a Quote**'. The 'Start SG Enrollment without a Quote' link is highlighted with a red box and a black circle containing the number '1'. Below the search text, there are several input fields: 'Account Name', 'Agent', 'Division: Illinois', 'Quote Number', 'Account Number', 'Case ID', 'Status', 'Effective Date', 'Market Segment: All', and 'EIN'. At the bottom right of the search area, there are 'Search' and 'Clear' buttons.

**Note:** In this User Guide, we will continue to use the **Start Enrollment without a Quote** option to explain the Small Group Enrollment process.

## 2 How to Enroll a Small Group (Contd.)

### I. Account Information

Account Name:	Market Segment: Small Group	Account Number:	Effective Date:
Producer: ITG Test Broker2	Status: Pre-enrollment	Quote Number: NA	Case ID: 13466
Created By: External	EFT Status: Not Processed		
<a href="#">Reports</a>	<a href="#">Documents List</a>	<a href="#">Attachments</a>	<a href="#">Log</a>
<a href="#">History</a>			
<a href="#">Discontinue</a>			

When an enrollment is started **without a quote**, some of the information on the page header will remain blank until the data is manually entered on the **Account Information** screen.

Other information will pre-populate for you:

- **Account Name:** blank
- **Market Segment:** **Small Group**
- Account Number: blank
- Effective Date: blank
- **Producer:** **Producer name, unless General Agent is enrolling the case.** In this example, ITG Test Broker2.
- **Status:** **Pre-Enrollment**
- Quote Number: NA
- **Case ID:** **Unique number assigned to case.** In this example, 13466.
- **Created By:** **External**

An Account Number will be reserved when you advance to the **Release for Enrollment** screen. The report links in the **Reports** button will also become active on this screen.

**Log:** Real Time entries can now be made by the producer up until Underwriter approval. The internal user will receive notification of log entries.

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## 2 How to Enroll a Small Group (Contd.)

### I. Account Information (contd.)

Account Information
Additional Information   Plan Selections   Member Census   Rates   Account Summary   Release for Enrollment

**Account Information** Continue

**General Information**

<p>*Employer's Legal Name: <input type="text"/></p> <p>*Employer ID Number (EIN): <input type="text"/></p> <p>*SIC Code: <input type="text"/> <span style="background-color: #4F81BD; color: white; padding: 2px 5px; border: 1px solid black;">Find</span> <input type="text"/> - <input type="text"/></p> <p>*Policy Effective Date: <input type="text" value="Please Select"/></p> <p>*Case Submitted to BCBS: <input type="text" value="05/04/2021"/></p> <p>Sales Rep. D/C: <input type="text"/> / <input type="text"/></p>	<p>*Does this group cover domestic partners?: <input type="radio"/> Yes <input type="radio"/> No</p> <p>*Is Group subject to COBRA?: <input type="radio"/> Yes <input type="radio"/> No</p> <p>*Do you want to purchase HCSC Cobra Administration?: <input type="radio"/> Yes <input type="radio"/> No</p>
--	--

**Blue Access for Employers (BAE)**

Contact Name: <input type="text"/>	Contact Title: <input type="text"/>
Phone (numbers only): <input type="text"/> Ext. <input type="text"/>	E-Mail Address: <input type="text"/>

**Employee Retirement Income Security Act (ERISA)**

\*ERISA Regulated Group Health Plan :  Yes  No

**Physical Address/Contact Information**

**!** Please refer to the USPS website to confirm accurate address information. [Visit USPS](#)

*Address 1: <input type="text"/>	Address 2: <input type="text"/>
*City: <input type="text"/>	State: Illinois
*Zip Code: <input type="text"/>	*County: <input type="text" value="Please Select"/>
*E-Mail Address of Authorized Company Official: <input type="text"/>	Secondary E-Mail Address: <input type="text"/>
*Phone (numbers only): <input type="text"/> Ext. <input type="text"/>	Fax (numbers only): <input type="text"/>
*Administrative Contact: <input type="text"/>	Contact Title: <input type="text"/>
*Different Billing Address?: <input type="radio"/> Yes <input checked="" type="radio"/> No	*Different Mailing Address?: <input type="radio"/> Yes <input checked="" type="radio"/> No

**Producer Information**

**Primary Producer**

*Primary Producer Name: <input type="text"/> <span style="background-color: #4F81BD; color: white; padding: 2px 5px; border: 1px solid black;">Find</span>	<span style="background-color: #4F81BD; color: white; padding: 2px 5px; border: 1px solid black;">Clear</span>
*Tax ID/SSN: <input type="text"/>	*Producer #: <input type="text"/>
*E-Mail Address: <input type="text"/>	*Confirm E-Mail Address: <input type="text"/>
Telephone #: <input type="text"/>	Complete Address: <input type="text"/>
Fax #: <input type="text"/>	

**!** Please reach out to your Sales Representative if there are multiple producers involved and commissions need to be split.

**Note:** The system will time out after several minutes of inactivity. Information is saved by clicking the green **Continue** button.

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## 2 How to Enroll a Small Group (Contd.)

### 1. Account Information (contd.)

2. Enter the required information under the General Information section. The required fields are marked with an asterisk (\*).

**Alert:** A group with the same EIN has been previously entered in this system. This is an informational alert only.

**Account Information**

**General Information**

\*Employer's Legal Name:

\*Employer ID Number (EIN):

\*SIC Code:  Wheat farms

\*Policy Effective Date:

\*Case Submitted to BCBS:

\*Does this group cover domestic partners?:  Yes  No

\*Is Group subject to COBRA?:  Yes  No

\*COBRA Administration?:  Yes  No

**Blue Access for Employers (BAE)**

Contact Name:

Phone (numbers only):  Ext.

Contact Title:

E-Mail Address:

**Employee Retirement Income Security Act (ERISA)**

\*ERISA Regulated Group Health Plan :  Yes  No

**2**

**Note:** If enrolling a group with an EIN already in our system, the tool will display the following alert. “Alert: A group with the same EIN has been previously entered in this system. This is an informational alert only.” However, the tool will still allow you to enroll the case.

## 2 How to Enroll a Small Group (Contd.)

### I. Account Information (contd.)

3. Answer the **Employee Retirement Income Security Act (ERISA)** question. When the **Yes** radio button is selected, additional fields will populate. In this example, we select ERISA as **No**.

**Employee Retirement Income Security Act (ERISA)**

\*ERISA Regulated Group Health Plan:  Yes  No

\*ERISA Plan Year - Beginning Date:  \*ERISA Plan Sponsor:

\*ERISA Plan Year - End Date:

**Employee Retirement Income Security Act (ERISA)**

\*ERISA Regulated Group Health Plan:  Yes  No **3**

4. Enter the **Company's Physical Address/Contact** Information. When entering the group's address in the **Physical Address** section, the tool will automatically check that the information is valid. If prompted, you need to enter a correct and accurate address to continue to the next required screen. If you encounter any issues while entering the address, visit the USPS link on the screen to confirm the appropriate address information.

**Physical Address/Contact Information**

ⓘ Please refer to the USPS website to confirm accurate address information. [Visit USPS](#)

\*Address 1:  Address 2:

\*City:  State: Texas

\*Zip Code:  \*County:

\*E-Mail Address of Authorized Company Official:  Secondary E-Mail Address:

\*Phone (numbers only):  Ext.  Fax (numbers only):

\*Administrative Contact:  Contact Title:

\*Different Billing Address?:  Yes  No \*Different Mailing Address?:  Yes  No

**Note:** When the zip code does not default, the user must select the county from the drop-down list. Please click the [USPS](#) link to check for the appropriate county. Incorrect county selection could result in incorrect rates.

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## 2 How to Enroll a Small Group (Contd.)

### I. Account Information (contd.)

Billing Address/Contact Information	
Address 1: <input type="text"/>	Address 2: <input type="text"/>
*City: <input type="text"/>	*State: <input type="text" value="Please Select"/>
*Zip Code: <input type="text"/>	*County: <input type="text" value="Please Select"/>
*E-Mail Address of Authorized Company Official: <input type="text"/>	Secondary E-Mail Address: <input type="text"/>
*Phone (numbers only): <input type="text"/> Ext. <input type="text"/>	Fax (numbers only): <input type="text"/>
*Administrative Contact: <input type="text"/>	Contact Title: <input type="text"/>
Mailing Address/Contact Information	
Address 1: <input type="text"/>	Address 2: <input type="text"/>
*City: <input type="text"/>	*State: <input type="text" value="Please Select"/>
*Zip Code: <input type="text"/>	*County: <input type="text" value="Please Select"/>
*E-Mail Address of Authorized Company Official: <input type="text"/>	Secondary E-Mail Address: <input type="text"/>
*Phone (numbers only): <input type="text"/> Ext. <input type="text"/>	Fax (numbers only): <input type="text"/>
*Administrative Contact: <input type="text"/>	Contact Title: <input type="text"/>

#### Optional Step:

If there are separate physical and mailing addresses, select the **Yes** radio button for billing address and **No** radio button for the mailing address to populate the additional mailing address fields. If **Yes** is selected for the 'different billing' and/or 'different mailing address' questions, additional fields will populate. Enter all required information.



**Important!** Until further notice, if a group has multiple addresses, for the physical address, select **Yes** for billing address, and **No** for mailing address.

**Note:** Out of state addresses are acceptable in the billing and mailing address sections.

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## 2 How to Enroll a Small Group (Contd.)

### I. Account Information (contd.)

**Producer Information**

**Primary Producer**

\*Primary Producer Name: Find ITG Test Broker2 Clear

\*Tax ID/SSN: ITBROKER2 \*Producer #: ITBROKER2

\*E-Mail Address:  \*Confirm E-Mail Address:

Telephone #: 8003995831 Complete Address: 901 South Central Expressway

Fax #:

**Find a Producer**

Producer Name:

Phone Number:

Producer Number:

Search

---

**Search Results**

1 - 10 of 24

	Producer Name	Producer Number	Phone	Fax	R/D/T	Contact Name
Use	WIGHT LOUIS ROGERS	000000353	8063581344	8063560371	01/04/021	Dwight Rogers
Use	WILLIAM GRADY ROGERS	000000672	9407230771		01/02/014	T Hutchings
Use	NOEL GENE ROGERS	000006477	2107349801	2107349813	03/26/065	Noel Rogers
Use	JAMES PATRICK ROGERS	000007597	9725231579	9725231579	01/02/015	JAMES ROGERS
Use	RICHARD WADE ROGERS	000014130	9369336899	8776778660	02/16/049	RICHARD ROGERS
Use	MATTHEW WILLIAM ROGERS	000016255	2149247479	9726448355	01/02/018	
Use	BETTYE ANN SIDMONS ROGERS	000018222	5126190805	5127322885	03/29/074	BETTYE ROGERS
Use	ROBERT JOSEPH ROGERS Jr.	000018288	2815960432		02/16/044	
Use	ROGERS BENEFIT GROUP INC	000018793	6028508866	6022960884	07/99/099	Marla Wilkerson
Use	ROBERT LEO ROGERS	000019196	9567241038	9567261174	03/26/065	

**Optional Step:** In the **Producer Information** section, the Primary Producer and/or General Agent (GA) information will appear blank. If you want to update the Primary Producer or Subproducer (writing agent) click **Find**. Enter any portion of the Producer's, General Agent's or Sub Producer's Name, Phone Number or Producer Number.

In this example, we search by the **Producer's** name. Click **Search**. Once the appropriate Producer is displayed, select the name by clicking **Use**. After selecting a Producer, you are automatically re-directed to the **Account Information** screen.

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## 2 How to Enroll a Small Group (Contd.)

### I. Account Information (contd.)

**Producer Information**

**Primary Producer**

\*Primary Producer Name:  ITG Test Broker2 5

\*Tax ID/SSN: ITBROKER2 \*Producer #: ITBROKER2

\*E-Mail Address:  \*Confirm E-Mail Address:

Telephone #:  Complete Address: 901 South Central Expressway

Fax #:

Please reach out to your Sales Representative if there are multiple producers involved and commissions need to be split.

**General Agent**

General Agent Name:

Tax ID/SSN:  Producer #:

E-Mail Address:  Confirm E-Mail Address:

Telephone #:  Complete Address:

Fax #:

**Subproducer**

Subproducer Name:

Subproducer #:

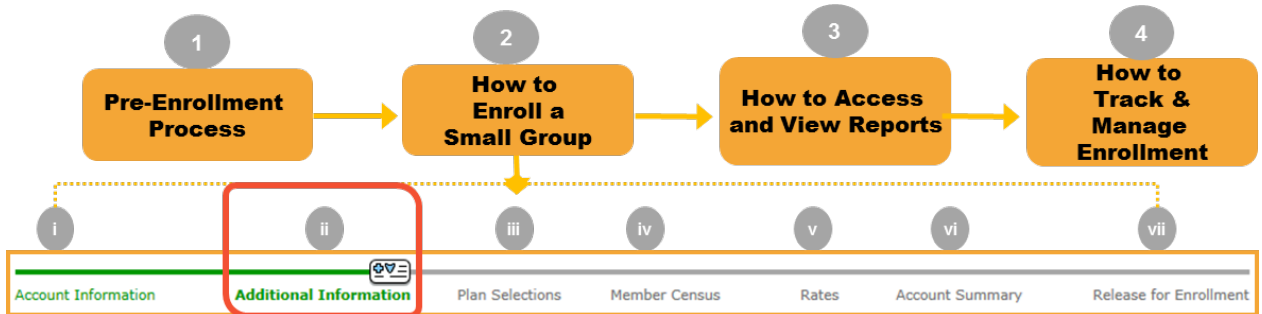
\* - Required

5. In the **Producer Information** section, you will be required to re-enter the email address to validate it. The tool will confirm that both the email addresses match. The tool will not allow you to copy the first instance of the email address into the second field. If the entries do not match, then you will view an error message: *"The email addresses do not match"*. Enter the email address. Renter the email address to validate it.
6. Once all required fields are complete, click the green **Continue** button to save and move to the next screen. Once saved, the data entered will populate the fields in the header.

**Note:** Ensure that the email address is accurate. All the notifications and communications regarding your case will be sent to this email address. During the Underwriter Review, in case the Underwriter needs more information or any additional information, then all relevant emails will be sent to this email address.

## 2 How to Enroll a Small Group (Contd.)

### II. Additional Information



In the earlier step, you have entered the required account information for your group. Next you will enter additional group level information.

#### Step ii: Additional Information

Enter the group level information in the required fields using the documentation provided. All fields marked with an asterisk (\*) are required. Use Previous and Continue to move backward and forward in the tool. Depending on your selection Yes or No, different additional fields will be displayed.

Account Information **Additional Information** Plan Selections Member Census Rates Account Summary Release for Enrollment

**Additional Information**

Previous Continue

\*Current Health Carrier:

**Eligibility\***

\*Waive the waiting period on initial enrollment?  Yes  No

The Eligibility Date for an employee who becomes eligible after the Effective date of the Group's Health Insurance Plan is determined by the 15th day of the month following  days of employment.

**Integrated HSA Vendor Selection**

Include Health Savings Account (HSA)?  Yes  No

If an Integrated HSA is selected, a vendor may be selected from the below options. (If none of the options are selected below, the integrated HSA vendor will default to "Other Non-Integrated HSA")

A. BenefitWallet (Mellon Bank)

B. Flex

C. HealthEquity

D. HSA Bank

E. Other Non-Integrated HSA

**Integrated FSA Vendor Selection**

Include Flexible Spending Account (FSA)?  Yes  No

Previous \* - Required Continue

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## 2 How to Enroll a Small Group (Contd.)

### II. Additional Information (contd.)

1. On the **Additional Information** screen, select the relevant Health Carrier.
2. Under the Eligibility section, if the **No** radio button is selected, additional fields will be displayed. In this example, we select **Yes**.

**Note:** Under the **Eligibility** section, you can enter the number from “1-60” for employees who have become eligible after the **Effective Date** of the their health plan.

Under the HSA Vendor selection section, if a HSA is selected on the paperwork, a vendor may be selected here from the available options. There are two vendor selections: Integrated HSA Vendor Selection and Integrated FSA Vendor Selection.

To select a vendor plan, click on Yes under the vendor to display the plans.

**Additional Information**

[Previous](#) [Continue](#)

\*Current Health Carrier:  1

**Eligibility\***

\*Waive the waiting period on initial enrollment?  Yes  No 2

The Eligibility Date for an employee who becomes eligible after the Effective date of the Group's Health Insurance Plan is determined by the 15th day of the month following  days of employment.

**Integrated HSA Vendor Selection**

Include Health Savings Account (HSA)?  Yes  No  
If an Integrated HSA is selected, a vendor may be selected from the below options. (If none of the options are selected below, the integrated HSA vendor will default to "Other Non-Integrated HSA")

A. BenefitWallet (Mellon Bank)  
 B. Flex  
 C. HealthEquity  
 D. HSA Bank  
 E. Other Non-Integrated HSA

**Integrated FSA Vendor Selection**

Include Flexible Spending Account (FSA)?  Yes  No

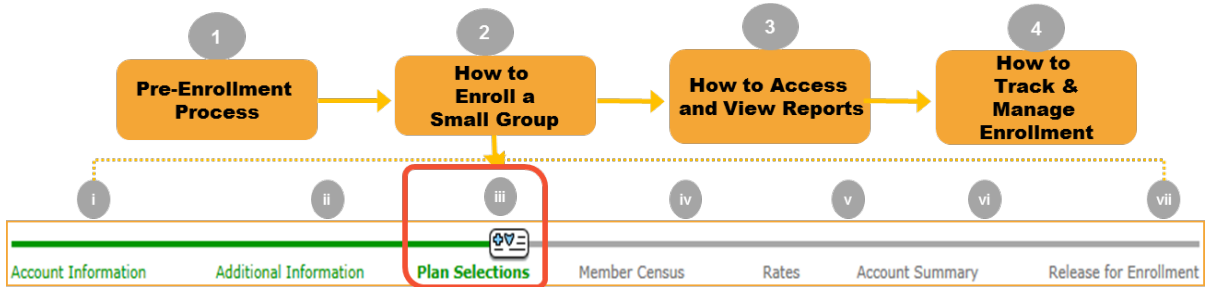
[Previous](#) [Continue](#) 3

\* - Required

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## 2 How to Enroll a Small Group (Contd.)

### III. Plan Selections



**Step iii: Plan Selections:** Now that you’ve entered additional information, you can select the appropriate medical, dental and life plans for your group using the documentation provided. All fields marked with an asterisk (\*) are required.

The screenshot shows the 'Plan Selections' web form. The 'Plan Selections' tab is active and highlighted with a red box. The form includes sections for Health (Yes/No), In-Vitro Coverage (Yes/No), and a table of plan options categorized by network (Blue Choice PPO Network, Blue Platinum Plans, Blue Gold Plans, Blue Silver Plans, Blue Bronze Plans).

Plan #	Ded In/Out	Office Visit/ Specialist	Coins In/Out	OPX In/Out	ER Copay* <sup>13</sup> /ER Coins	IP In/Out	OP Surg In/Out	Ped Dental In/Out	Rx **
<b>Blue Choice PPO Network</b>									
<b>PPO Plans</b>									
<b>Blue Platinum Plans</b>									
<input checked="" type="checkbox"/> P600CHC	\$250/\$500	\$25/\$45	80%/60%	\$1250/\$2500	\$300/80%	\$150/\$250	\$100/\$200	70%/70%	\$0/\$10/\$35/\$75/\$150
<input checked="" type="checkbox"/> P601CHC	\$1250/\$2500	\$25/\$45	100%/100%	\$1250/\$2500	\$300/100%	\$150/\$250	\$100/\$200	70%/70%	\$0/\$10/\$35/\$75/\$150
<b>Blue Gold Plans</b>									
<input type="checkbox"/> G620CHC	\$1000/\$2000	\$20/\$40	80%/60%	\$3900/\$7800	\$400/80%	NA/NA	NA/NA	70%/70%	\$15/\$40/\$55
<input type="checkbox"/> G623CHC	\$1250/\$2500	\$20/\$60	100%/80%	\$4500/\$9000	\$300/100%	\$150/\$250	\$100/\$200	70%/70%	\$0/\$10/\$50/\$100/\$150
<input type="checkbox"/> G622CHC	\$1250/\$2500	\$30/\$50	80%/60%	\$3500/\$7000	\$400/80%	NA/NA	NA/NA	70%/70%	\$15/\$30/\$45
<input type="checkbox"/> G621CHC	\$3125/\$6250	\$25/\$50	100%/100%	\$3125/\$6250	\$400/100%	NA/NA	NA/NA	100%/100%	\$10/\$40/\$60
<input type="checkbox"/> G617CHC	\$3000/\$6000	\$30/\$50	100%/100%	\$3000/\$6000	\$400/100%	\$200/\$300	\$150/\$250	100%/100%	\$0/\$10/\$50/\$100/\$150
<input type="checkbox"/> G616CHC	\$1500/\$3000	\$10/\$60	80%/60%	\$3500/\$7000	\$400/80%	\$200/\$300	\$150/\$250	70%/70%	\$0/\$10/\$35/\$75/\$150
<b>Blue Silver Plans</b>									
<input type="checkbox"/> S610CHC * <sup>1</sup>	\$2000/\$4000	\$40/\$70	70%/50%	\$6850/\$13700	\$500/70%	\$250/\$350	\$200/\$300	70%/70%	\$0/\$10/\$50/\$100/\$150
<input type="checkbox"/> S611CHC * <sup>1</sup>	\$2500/\$5000	\$40/\$60	80%/60%	\$6600/\$13200	\$500/80%	\$250/\$350	\$200/\$300	70%/70%	\$0/\$10/\$50/\$100/\$150
<input type="checkbox"/> S607CHC	\$3000/\$6000	\$30/\$50	80%/60%	\$6350/\$12700	\$500/80%	\$250/\$350	\$200/\$300	70%/70%	\$0/\$10/\$50/\$100/\$150
<input type="checkbox"/> S608CHC	\$3000/\$6000	\$40/\$60	70%/50%	\$6000/\$12000	\$500/70%	NA/NA	NA/NA	70%/70%	\$20/\$40/\$60
<input type="checkbox"/> S606CHC	\$6000/\$12000	\$20/\$40	100%/100%	\$6000/\$12000	\$500/100%	\$250/\$350	\$200/\$300	100%/100%	\$0/\$10/\$50/\$100/\$150
<input type="checkbox"/> S600CHC	\$6000/\$12000	\$20/\$40	100%/100%	\$6000/\$12000	NA/100%	NA/NA	NA/NA	100%/100%	\$0/\$10/\$35/\$75/\$150
<b>Blue Bronze Plans</b>									
<input type="checkbox"/> B600CHC	\$6850/\$13700	NA/NA	100%/100%	\$6850/\$13700	NA/100%	NA/NA	NA/NA	100%/100%	100%

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## 2 How to Enroll a Small Group (Contd.)

### III. Plan Selections (contd.)

1. On the **Plan Selections** screen, for Health, the **Yes** option will default. If the group has not elected a health plan (i.e. Dental or Life only plans), you must manually select **No**. In this example, we keep the default selection of **Yes** and select the health plans.

Health  Yes  No 1

In-Vitro Coverage:  Yes  No

**Blue Choice PPO Network**

	Office Visit/	ER Copay <sup>3</sup> /ER	OP Surg	Ped Dental	**					
<b>PPO Plans</b>										
<b>Blue Platinum Plans</b>										
<input checked="" type="checkbox"/>	P600CHC	\$250/\$500	\$25/\$45	80%/60%	\$1250/\$2500	\$300/80%	\$150/\$250	\$100/\$200	70%/70%	\$0/\$10/\$35/\$75/\$150
<input checked="" type="checkbox"/>	P601CHC	\$1250/\$2500	\$25/\$45	100%/100%	\$1250/\$2500	\$300/100%	\$150/\$250	\$100/\$200	70%/70%	\$0/\$10/\$35/\$75/\$150

2. The **No** option will default for In-Vitro Coverage. If In-Vitro is covered, you must manually select **Yes**. If you select **Yes**, you can compare the with In-Vitro and without In-Vitro plans and make an informed decision. In this example, we select **No**.

Account Information Additional Information **Plan Selections** Member Census Rates Account Summary Release for Enrollment

Plan Selections

Previous Continue

Health  Yes  No

In-Vitro Coverage:  Yes  No 2

All Plans shown below are In-Vitro eligible.  
Texas Department of Insurance mandates that the option to purchase In-Vitro Fertilization (IVF) be made available to applying groups. Employers have the option of accepting or declining the IVF benefits. If the IVF benefit is elected, significant rating impacts will apply.

**Blue Choice PPO Network**

In-Vitro Plan #	Plan #	Ded In/Out	Office Visit/ Specialist	Coins In/Out	OPX In/Out	ER Copay <sup>3</sup> /ER Coins	IP In/Out	OP Surg In/Out	Ped Dental In/Out	Rx **



**Important!** Selecting In-Vitro Coverage will significantly increase rates and change the plans.

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## 2 How to Enroll a Small Group (Contd.)

### III. Plan Selections (contd.)


**Ancillary Products - Dental** Yes No **3**

If Dental is purchased, select from the following Dental plans.

Plan #	Plan Type	Deductible In/Out *2	Annual Benefit Max	Out-of-Network Reimb.	Coinsurance		Orthodontia Lifetime Max	
					In Network	Out Of Network		
<b>True Group</b>								
<b>High Allocation</b>								
<input checked="" type="checkbox"/>	<b>DTXHR01</b>	<b>Passive</b>	<b>\$25/\$25</b>	<b>\$3000</b>	<b>90th R&amp;C</b>	<b>100%/80%/50%/50%</b>	<b>100%/80%/50%/50%</b>	<b>\$2000</b>
<input type="checkbox"/>	DTXHR02	Passive	\$50/\$50	\$2000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$2000
<input type="checkbox"/>	DTXHR03	Passive	\$50/\$50	\$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$1500
<input type="checkbox"/>	DTXHR04	Passive	\$50/\$50	\$1000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$1000
<input type="checkbox"/>	DTXHM09 *1	Passive	\$50/\$50	\$1500	MAC	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXHM11 *3	Passive	\$25/\$25	\$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
<b>Low Allocation</b>								
<input type="checkbox"/>	DTXLR05	Passive	\$50/\$50	\$1500	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXLR06	Passive	\$50/\$50	\$1000	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXLR07	Passive	\$75/\$75	\$1000	90th R&C	90%/70%/50%/NA	90%/70%/50%/NA	NA
<input type="checkbox"/>	DTXLM08	Passive	\$50/\$50	\$1500	MAC	100%/80%/50%/50%	100%/80%/50%/50%	\$1000
<input type="checkbox"/>	DTXLM10 *1	Passive	\$75/\$75	\$1000	MAC	90%/70%/50%/NA	90%/70%/50%/NA	NA
<b>Voluntary Group</b>								
<b>High Allocation</b>								
<input type="checkbox"/>	DTXHR12 *1	Passive	\$50/\$50	\$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$1500
<input type="checkbox"/>	DTXHM13 *1	Passive	\$50/\$50	\$1500	MAC	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXHM15 *3	Passive	\$25/\$25	\$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
<b>Low Allocation</b>								
<input type="checkbox"/>	DTXLM14 *1	Passive	\$75/\$75	\$1000	MAC	90%/70%/50%/NA	90%/70%/50%/NA	NA

2. The Ancillary Products- Dental radio button will default to **No**. In this example, we select **Yes** and select the relevant dental plans.

**Attention**

 The number of plans selected exceeds the maximum selection allowed (6 plans).

You can only select a specified number of medical, dental or life plans. You will receive the attention message above if the number of plans you select exceeds that number.

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## 2 How to Enroll a Small Group (Contd.)

### III. Plan Selections (contd.)

Low Allocation								
<input type="checkbox"/>	DTXLR05	Passive	\$50/\$50	\$1500	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXLR06	Passive	\$50/\$50	\$1000	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXLR07	Passive	\$75/\$75	\$1000	90th R&C	90%/70%/50%/NA	90%/70%/50%/NA	NA
<input type="checkbox"/>	DTXLM08	Passive	\$50/\$50	\$1500	MAC	100%/80%/50%/50%	100%/80%/50%/50%	\$1000
<input type="checkbox"/>	DTXLM10 *1	Passive	\$75/\$75	\$1000		100%/80%/50%/NA	90%/70%/50%/NA	NA
Voluntary Group								
High Allocation								
<input type="checkbox"/>	DTXHR12 *1	Passive	\$50/\$50	\$1500		/50%	100%/80%/50%/50%	\$1500
<input type="checkbox"/>	DTXHM13 *1	Passive	\$50/\$50	\$1500		%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/>	DTXHM15 *3	Passive	\$25/\$25	\$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA

#### Confirmation

Do you want to delete the Plans?

Ok

Cancel

For any of the plans, if you have selected the **Yes** radio button and then change your selection to No, you see a confirmation pop-up asking **Do you want to delete the plans?** Click **OK** if no products are wanted in this category. This action does not remove any benefits, it only collapses the section.

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## 2 How to Enroll a Small Group (Contd.)

### III. Plan Selections (contd.)

Life  Yes  No **4**

Select from the following Life plans.

Group Life and AD&D  Short Term Disability  Dependent Life

**Life and STD Benefit Selections**

**Employer Life Contribution**

Enter the Percentage of the Premium that the Employer is going to contribute towards Life Coverage. 100% participation is required if contribution is 100%. The minimum contribution is 25% for Term Life and STD.

\*Term Life Premium  **5**

**Life/STD Classes**

Define up to 3 classes of employees. For each class, select a multiple of earnings or a flat amount. If a multiple of earnings is selected, an annual salary will be required on the next page. Uncheck classes to remove them from use.

Class Description	Life			Short Term Disability		
	Flat	Salary	Max	Flat	Salary	Max
<input checked="" type="checkbox"/> 1 All Active Full Time	<input type="radio"/> \$30000	<input type="radio"/>	<input type="text" value="30000"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/> 2	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/> 3	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

**Term Life Options**

Age Reduction Factors:

[Previous](#) [Continue](#)

- The Life radio button will default to **No**. When the **Yes** radio button is selected, the Life plan options will populate. In this example, we select **Yes**. Click the '**Life and STD Benefit Selections**' link to populate the additional required fields. Only those fields applicable to the selected ancillary products will populate. Now, the Life Selection option will default to 0-9 employees.
- Enter the Term Life Premium amount. In this example, it is \$100.
- Click **Continue** to proceed to the **Member Census** screen.

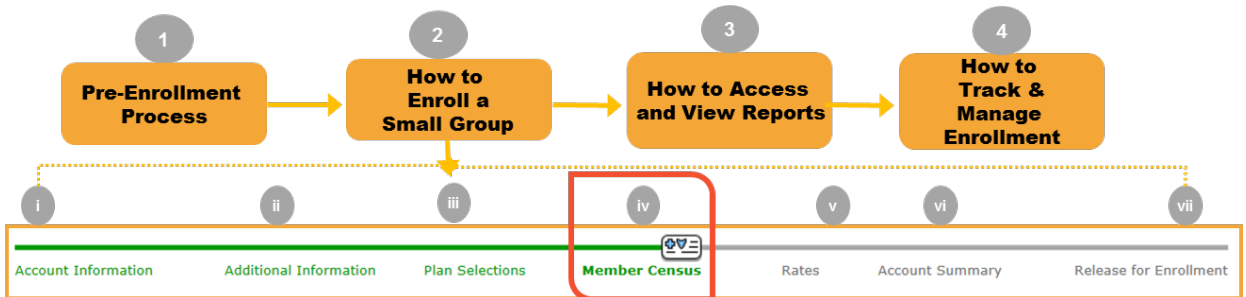


**IMPORTANT!** You must enter the percentage of the premium that the employer is going to contribute towards Life Coverage. When Life is selected, the Salary Period will default to Annual. On Member Census page, the Salary field minimum value is \$10,000.00.

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census



#### Step iv: Member Census:

You have entered the appropriate plans for your group. Next, you will enter the Member Census either manually or via a file import method using the provided documentation.

**Member Census**

Previous Continue

Census Count: 0 Add Member Import Census

View Member	Name	Relationship Code	Gender	Date of Birth	Age	Health Coverage Type	Dental Coverage Type	State	Health Plan Selected	Dental Plan Selected
<b>Enrollment Totals</b>						<b>Health Coverage</b>				
* # of Employees On Payroll						# of Employees Enrolling In Health				
+ # of New Hires						# of Employees Waiving With Other Health Coverage				
- # of Temporary Employees						# of Employees Waiving Without Other Health Coverage				
- # of Part Time Employees										
- # of Seasonal Employees						<b>Dental Coverage</b>				
- # of Terminated Employees						# of Employees Enrolling In Dental				
- # of Employees Serving An Eligibility Waiting Period						# of Employees Waiving With Other Dental Coverage				
= Total Eligible Employees						# of Employees Waiving Without Other Dental Coverage				

Note: BCBS may restrict open enrollment for those accounts not meeting 75 percent participation.

\* - Required

Previous Continue



**IMPORTANT!** Information for all eligible employees waiving coverage must be included in order to calculate the participation percentage.

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census

#### Manual Entry

The steps below will walk you through how to manually enter member census.

The screenshot shows the 'Member Census' interface. At the top left is a 'Previous' button. In the center, a large '1' is overlaid on the 'Add Member' button, which is highlighted with a red box. To the right of the 'Add Member' button is an 'Import Census' button with a question mark icon. Below this is a navigation bar with '0 - 0 of 0' and left/right arrow icons. A table header is visible with columns: View Member, Name, Relationship Code, Gender, Date of Birth, Age, Health Coverage Type, Dental Coverage Type, State, Health Plan Selected, and Dental Plan Selected.

1. On the Member Census screen, click **Add Member** to manually add the Member Census information.
2. Click **Continue** to go through the Employee Information, Coverage Elections, Dependent Information, Other Coverage, and Employee Application Complete Screens. As members are added, the census count will auto-populate the appropriate number of rows. Let's begin with the Employee Information screen.
  - **2a: Employee Information:** General census information regarding the employee.

The screenshot shows the 'Enrollment for New Member' screen with the 'Employee Information' tab selected and highlighted with a red box. A large '2a' is overlaid on the tab. The form is divided into 'General Information' and 'Employment Information' sections. Fields include Last Name (Black), First Name (Joe), SSN (55555555), Date of Birth (08/08/1980), Address 1 (409 Arborcrest Dr, Richardson, TX 75080), and Employment Status (Active). A 'Continue' button is at the bottom right.

This is a close-up of the 'Employment Information' section. It contains the following fields: Marital Status (Please Select), Job Title (empty), Hrs/Week (empty), Employment Status (Active), Hire Date (05/05/2015), and Employee Signature Date (06/10/2015).

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Manual Entry (contd.)

#### Step 2 continued: Add Member: Enrollment for New Member

- **Employee Information:** The Waiver information is also included in this section. You will have minimal data entry if a member waives all coverage. You are required to select the Waive Reason Code and Name.

**Enrollment for New Member**

Employee Information      Coverage Elections      Dependent Information      Other Coverage

\*Waive All Coverage:  Yes  No

\*Waive Reason Code:       Waive Reason Description:

- **2b: Coverage Elections:** Enter Health, Dental and Life product option selection at the member level.. When Life selected, the Salary Period will default to Annual. Salary minimum required is 10,000.00.

**Enrollment for New Member**

Employee Information      **2b** Coverage Elections      Dependent Information      Other Coverage

\*Health Coverage:  Yes  No

\*Dental Coverage:  Yes  No

\*Life Coverage:  Yes  No

**Health Coverage:**

\*Coverage Type:

\*Type of Coverage:  PPO (Participating Provider Options) Network - F500PPO  
 PPO (Participating Provider Options) Network - G515PPO

**Dental Coverage:**

\*Coverage Type:

\*Type of Coverage:  Dental Plans - DLHR01

**Life Coverage:**

**Alert:** The Salary entered is less than \$10,000. Annual Salary is required.

\*Term Life:

\*Job Class Type:

\*Salary Period:

\*Salary:

     \* - Required fields  
 † - Required when BlueCare DHMO has been selected as the Dental Plan     

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Manual Entry (contd.)

#### Step 2 continued: Add Member: Enrollment for New Member

- **2c: Dependent Information:** General census information regarding covered dependents is entered here. If Dependents are covered, click **Add Dependent** and the applicable fields will populate.

**Enrollment for New Member**

Employee Information      Coverage Elections      **Dependent Information** **2c**      Other Coverage

**Select Dependents**  
Add Dependent

**Dependent Information for New Dependent**

\*Last Name:       \*First Name:  MI:   
 \*Date of Birth:  (mm/dd/yyyy)      SSN:   
 \*Relationship:       \*Gender:

Save      Clear

**Previous**      \* - Required fields  
 † - Required when HMO has been selected as the Health Plan  
 ‡ - Required when CPO has been selected as the Health Plan      **Continue**

Enter the dependent information click **Save** and then click **Continue**.

## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Manual Entry (contd.)

#### Step 2 continued: Add Member: Enrollment for New Member

- **2d: Other Coverage:** Any applicable Medicare information for both the employee and dependent are entered here. When the name is selected, additional Medicare information fields will populate. Enter the information and then click **Save** and **Close**.

The screenshot shows the 'Enrollment for New Member' interface. The '2d: Other Coverage' tab is active, showing a 'Select Member' dropdown with 'Black, Joe' selected. The 'Medicare Information for Black Joe' section includes fields for Medicare HIC Number, Medicare Eligible (Y/N/U), Medicare Reason, and Medicare Primary or Secondary. Below this is a table for Medicare plans:

Plan	Start Date	End Date
Medicare A	<input type="text"/> (mm/dd/yyyy)	<input type="text"/> (mm/dd/yyyy)
Medicare B	<input type="text"/> (mm/dd/yyyy)	<input type="text"/> (mm/dd/yyyy)

At the bottom, there are 'Previous' and 'Save and Close' buttons, and a legend for required fields: \*

- \* - Required fields
- † - Required when HMO has been selected as the Health Plan
- ‡ - Required when CPO has been selected as the Health Plan

**Note:** When HMO coverage is elected, additional fields will become visible to enter the Medical Group and PCP information. If no Medical Group IPA # is entered **597** will default. If the medical group defaults to **597**, the member will not receive or be able to print an ID card and may have difficulty accessing benefits until a medical group is selected. Please be sure to inform the member.



**IMPORTANT!** PCP and Medical Group information is required. Users may select the Provider Help link to access the provider finder portal.

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Manual Entry (contd.)

Account Information Additional Information Plan Selections **Member Census** Rates Account Summary Release for Enrollment

**Member Census** Previous Continue

Census Count: 2 Add Member Export Census Import Census

1 - 2 of 2

	View Member	Name	Relationship Code	Gender	Date of Birth	Age	Health Coverage Type	Dental Coverage Type	State	Health Plan Selected	Dental Plan Selected
<input checked="" type="checkbox"/>		Joe Black	Employee	M	08/08/1980	36	EO	EO	TX	P600CHC	DTXHR01
<input type="checkbox"/>		Matt Brown	Employee	M	04/14/1970	46	EO	EO	TX	P600CHC	DTXHR01

**Enrollment Totals**

\* # of Employees On Payroll  3

+ # of New Hires

- # of Temporary Employees

- # of Part Time Employees

- # of Seasonal Employees

- # of Terminated Employees

- # of Employees Serving An Eligibility Waiting Period

= Total Eligible Employees

**Health Coverage**

# of Employees Enrolling In Health

# of Employees Waiving With Other Health Coverage

# of Employees Waiving Without Other Health Coverage

**Dental Coverage**

# of Employees Enrolling In Dental

# of Employees Waiving With Other Dental Coverage

# of Employees Waiving Without Other Dental Coverage

Note: BCBS may restrict open enrollment for those accounts not meeting 75 percent participation.

\* - Required

Previous Continue

#### Step iv: Member Census continued.

- In this example, we have added two members. Next, enter the total # of Employees on Payroll. This is a required field. The fields which follow must also be completed if applicable. The census totals for health and dental coverage will default based on the census information entered.
- After manually entering the information, you can click **Continue** to proceed to the **Rates** screen.

Account Information Additional Information Plan Selections **Member Census** Rates Account Summary Release for Enrollment

**Member Census** Previous Continue

Census Count: 2 Add Member Export Census Import Census

**Confirmation**

Are you sure you want to delete the Member?

Ok Cancel

	View Member	Name	Relationship Code	Gender	Coverage Type	State	Health Plan Selected	Dental Plan Selected
<input checked="" type="checkbox"/>		Joe Black	Employee	M	EO	TX	P600CHC	DTXHR01
<input checked="" type="checkbox"/>		Matt Brown	Employee	M	EO	TX	P600CHC	DTXHR01

**Note:** Members can be deleted by clicking the red 'X' next to their name.

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Account Information    Additional Information    Plan Selections    **Member Census**    Rates    Account Summary    Release for Enrollment

**Member Census**    Previous    Continue

Census Count: 2    Add Member    Export Census    **Import Census** ?

	View Member	Name	Relationship Code	Gender	Date of Birth	Age	Health Coverage Type	Dental Coverage Type	State	Health Plan Selected	Dental Plan Selected
1		Joe Black	Employee	M	05/05/1975	41	EO	EO	IL	CS&PPO	DILHR01
2		Matt Brown	Employee	M	02/28/1970	46	EO				DILHR01

**Enrollment Totals**

* # of Employees On Payroll	2
+ # of New Hires	
- # of Temporary Employees	
- # of Part Time Employees	
- # of Seasonal Employees	
- # of Terminated Employees	
- # of Employees Serving An Eligibility Waiting Period	
= Total Eligible Employees	2

**Health Coverage**

# of Employees Enrolling In Health	2
# of Employees Waiving With Other Health Coverage	0
# of Employees Waiving Without Other Health Coverage	0

**Dental Coverage**

# of Employees Enrolling In Dental	2
# of Employees Waiving With Other Dental Coverage	0
# of Employees Waiving Without Other Dental Coverage	0

Note: BCBS may restrict open enrollment for those accounts not meeting 70 percent participation.

\* - Required

Previous    Continue

# HOW TO ENROLL A SMALL GROUP (CONTD.)

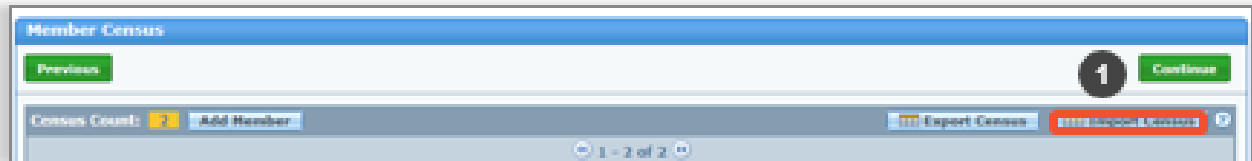
## IV. MEMBER CENSUS (CONTD.)

### Import Census

## 2 How to Enroll a Small Group (Contd.)

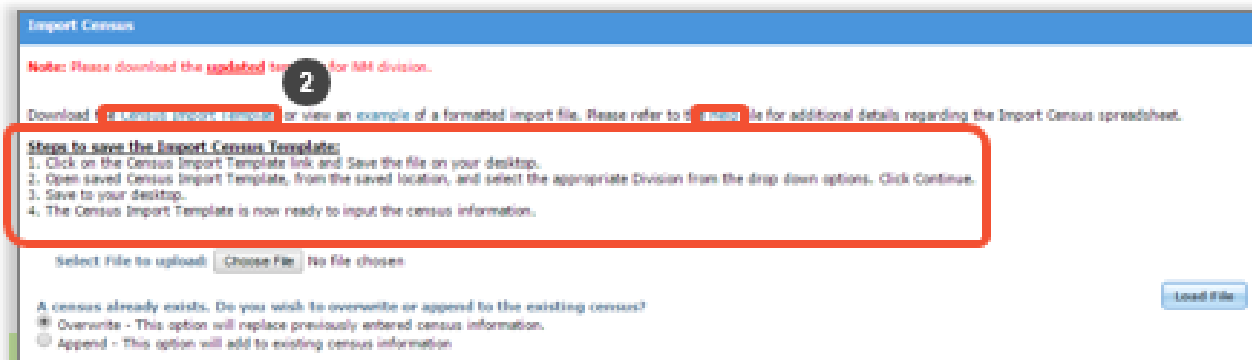
### IV. Member Census (contd.)

#### Import Census



#### Step iv: Member Census (Import Census)

1. To use the Import Census option, click **Import Census**.
2. If you don't have the latest template, click the **Census Import Template** link. Save the file on your local drive.



#### Note:

- The **Import Census** pop-up window includes a separate link for the **Help** file, which includes separate tabs for each division in the spreadsheet.
- Steps to properly download and save the import file.
- Clear definitions for **Overwrite** and **Append import** file function.

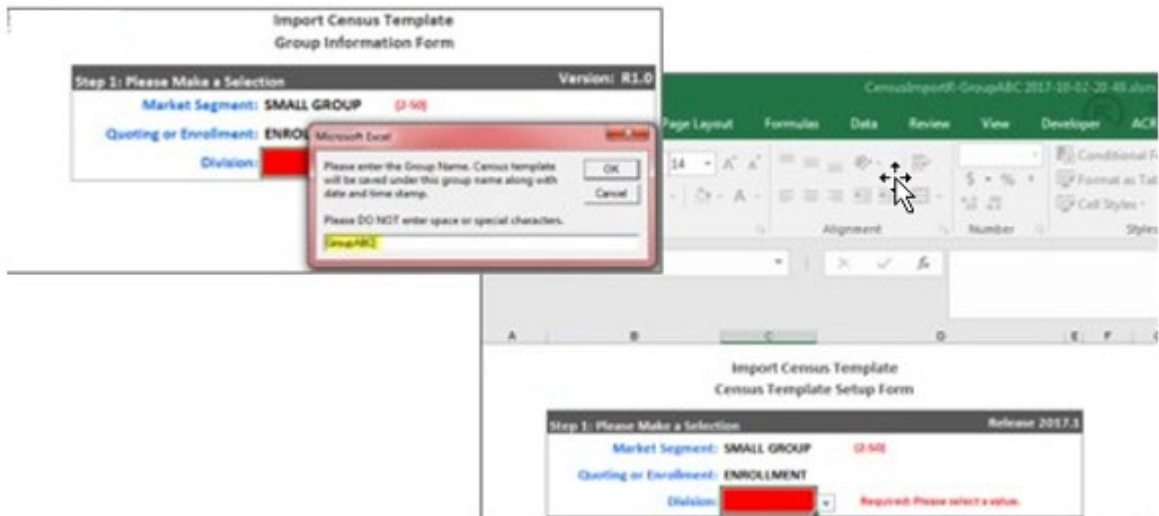
## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Import Census (contd.)

Steps for entering a Group's Census using import census template:

- 1). Open SCIT and save under the Group's Name.
- 2). Complete Census Template Setup form.
- 3). Enter data in Import Census Template tab.
- 4). Click File Save to validate data.
- 5). An Error List will be generated. Correct errors and click File Save to re-validate data.
- 6). Upon successful validation, upload SCIT to Small Group Enrollment Tool.



For more information, please refer to the Smart Census Tool Detailed Reference Guide.

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Import Census (contd.)

**Import Census**

**Note:** Please download the [updated](#) template for TX division.

Download the [Census Import Template](#) or view an [example](#) of a formatted import file. Please refer to the [Help](#) file for additional details regarding the Import Census spreadsheet.

**Steps to save the Import Census Template:**

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload: Choose File Census Impor...-11-18.xlsm 4

A census already exists. Do you wish to overwrite or append to the existing census?

Overwrite - This option will replace previously entered census information.

Append - This option will add to existing census information

Load File 5

4. Click **Choose File** and select the appropriate file.
5. Click **Load File**.

**Import Census**

Download the [Census Import Template](#) or view an [example](#) of a formatted import file. Please refer to the [Help](#) file for additional details regarding the Import Census spreadsheet.

**Steps to save the Import Census Template:**

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload: Choose File Census Impor...-11-18.xlsm Load File

A census already exists. Do you wish to overwrite or append to the existing census?


Overwrite - This option will replace previously entered census information.

Append - This option will add to existing census information

---

Note: "Override and Import" will upload the census ignoring the warning messages. Override and Import Cancel

**Attention**



indicates Error Message  
 indicates Warning Message

**Note:** The Import Census pop-up will also include the following:

- A clarification for **Override** and **Import** upload option.
- A legend key for warning and error symbols

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Import Census (contd.)

**Import Census**

Download the Census Import Template or view an example of a formatted import file. Please refer to the Help file for additional details regarding the Import Census spreadsheet.

**Steps to save the Import Census Template:**

1. Click on the Census Import Template link and Save the file on your desktop.
2. Open saved Census Import Template, from the saved location, and select the appropriate Division from the drop down options. Click Continue.
3. Save to your desktop.
4. The Census Import Template is now ready to input the census information.

Select File to upload:  Census Impor...-11-18.xlsm


A census already exists. Do you wish to overwrite or append to the existing census?


Overwrite - This option will replace previously entered census information.

Append - This option will add to existing census information

Note: "Override and Import" will upload the census ignoring the warning messages.

**Attention**

 indicates Warning Message



 indicates Error Message

6. Click **Override and Import**. The census information will automatically populate into the **Member Census** page.
7. Enter the total # of Employees on Payroll.
8. Click **Continue** to proceed to the **Rates** screen.

Account Information Additional Information Plan Selections **Member Census** Rates Account Summary Release for Enrollment

**Member Census**

Census Count: 2

View Member	Name	Relationship Code	Gender	Date of Birth	Age	Health Coverage Type	Dental Coverage Type	State	Health Plan Selected	Dental Plan Selected
 1	Joe Black	Employee	M	08/08/1980	36	EO	EO	TX	P600CHC	DTXHR01
 2	Matt Brown	Employee	M	04/14/1970	46	EO	EO	TX	P600CHC	DTXHR01

**Enrollment Totals**

# of Employees On Payroll  **7**

# of New Hires

# of Temporary Employees

# of Part Time Employees

# of Seasonal Employees

# of Terminated Employees

# of Employees Serving An Eligibility Waiting Period

Total Eligible Employees

**Health Coverage**

# of Employees Enrolling In Health

# of Employees Waiving With Other Health Coverage

# of Employees Waiving Without Other Health Coverage

**Dental Coverage**

# of Employees Enrolling In Dental

# of Employees Waiving With Other Dental Coverage

# of Employees Waiving Without Other Dental Coverage

Note: BCBS may restrict open enrollment for those accounts not meeting 75 percent participation.

\* - Required

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## 2 How to Enroll a Small Group (Contd.)

### IV. Member Census (contd.)

#### Import Census (contd.)

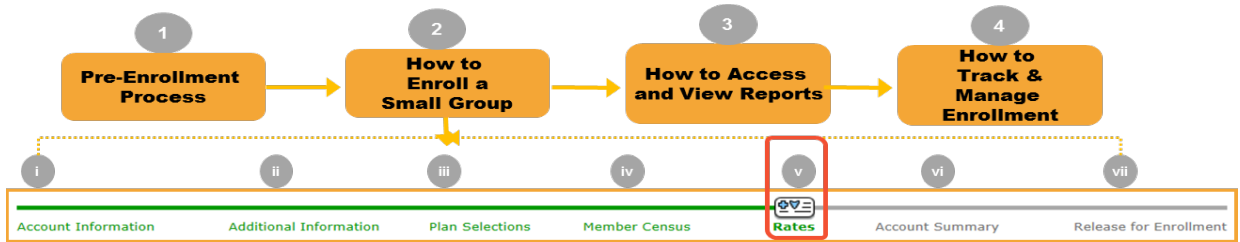


#### Helpful Tips

- 1) New census template will not work with Excel 2009 and older version. Please use the old import census template or enter census in ACA Enrollment Tool directly.
- 2) If macros are not enabled, you will need to click Enable Content button at the top or change your Excel Trust setting (Please refer to the training manual for instructions).
- 3) Each time you open CITE, you will be prompted to enter group name. This entry is used to save the file under that group's name along with date and time stamp. The original CITE file remains intact. For next group's census, open the original CITE file.
- 4) Entire cell will be highlighted in Red for required entry and if a value is invalid cells will be highlighted in Yellow.
- 5) If you are typing in data, value will be validated on Enter. A error message displays with Retry and Cancel button. Retry return you to the cell for edit and Cancel wipes out the typed value.
- 6) Before copying from an external source and pasting data onto CITE, please make sure the source format matches to the required format for the CITE census column.
- 7) Be sure to validate data once data entry is complete by clicking on File Save. A separate Error List tab will be generated. To fix the errors, you can toggle back and forth from Import Census tab and Error List tab.

## 2 How to Enroll a Small Group (Contd.)

### V. Rates



4. The Rating Model is displayed. You need to select the Rating Model either Member Level or 4-Tier Composite. In this example, we select **Member Level**. After making your selection, you can click **Print** to print the rates.

**Rating Model**  
 Member Level    4-Tier Composite

4

**⚠ ATTENTION:** There are two billing options to select from

- 1) Member level age rates OR
- 2) Composite rates.

Composite rates are calculated by aggregating the total premium across a four tier format. Important to note that billing changes are only allowed at policy anniversary date. Please carefully select the desired billing format for your enrolling client.

Member Level Rates												
Employer Name: TEST_TX_UG				Plan: P600CHC				Case ID: 13466				<a href="#">Print</a>
Effective Date: 10/15/2016				Employer Zip Code: 75080				Employer County: Dallas				
Member Rates												
Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	
<21	\$311.40	28	\$533.05	36	\$603.18	44	\$685.07	52	\$957.24	60	\$1,330.92	
21	\$490.39	29	\$548.75	37	\$607.10	45	\$708.12	53	\$1,000.39	61	\$1,377.99	
22	\$490.39	30	\$556.59	38	\$611.03	46	\$735.58	54	\$1,046.98	62	\$1,408.89	
23	\$490.39	31	\$568.36	39	\$618.87	47	\$766.48	55	\$1,093.57	63	\$1,447.63	
24	\$490.39	32	\$580.13	40	\$626.72	48	\$801.79	56	\$1,144.08	64	\$1,471.17	
25	\$492.35	33	\$587.49	41	\$638.49	49	\$836.60	57	\$1,195.08	65+	\$1,471.17	
26	\$502.16	34	\$595.33	42	\$649.77	50	\$875.84	58	\$1,249.51			
27	\$513.93	35	\$599.26	43	\$665.46	51	\$914.58	59	\$1,276.48			
* - Total Monthly Health Cost includes the effects of Health Insurer and Reinsurance Fees, plus any federal and state taxes applicable to these fees.												
Census												
	Name	Relationship Code	Date of Birth	Age	Coverage Type	State	Total Monthly Health Cost*					
1	Joe Black	Employee	08/08/1980	36	EO	TX	\$603.18					
2	Matt Brown	Employee	04/14/1970	46	EO	TX	\$735.58					
							<b>Total:</b>	<b>\$1,338.76</b>				
* - Total Monthly Health Cost includes the effects of Health Insurer and Reinsurance Fees, plus any federal and state taxes applicable to these fees. Estimated Health Insurer & Reinsurance Fees = <b>\$36.00</b>												

[Print](#)



**ATTENTION:** There are two billing options to select from  
 1) Member level age rates OR 2) Composite rates.  
 Select a rating model, and click the magnifying glass in the Rates column next to the product to view rates and Census information.

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## 2 How to Enroll a Small Group (Contd.)

### V. Rates (contd.)

#### Composite Rates Example

Composite Rates							
Employer Name: TEST_TX_UG		Plan: P600CHC		Case ID: 13466			
Effective Date: 10/15/2016		Employer Zip Code: 75080		Employer County: Dallas			
Rate Table							
4-Tier Rates							
Employee Only	Employee + Spouse *	Employee + Child *	Employee + Family *				
\$669.38	\$1,338.76	\$1,338.76	\$2,008.14				
* The Composite Rates shown in the above 4Tier Rates table are specific to the plan shown in the header section and based on the census entered AND includes the effects of Health insurer and Reinsurance Fees,plus any Federal and State taxes applicable to these fees.							
Census							
	Name	Relationship Code	Date of Birth	Age	Coverage Type	State	Total Monthly Health Cost*
1	Joe Black	Employee	08/08/1980	36	EO	TX	\$669.38
2	Matt Brown	Employee	04/14/1970	46	EO	TX	\$669.38
Total:							\$1,338.76
* - Total Monthly Health Cost includes the effects of Health Insurer and Reinsurance Fees, plus any federal and state taxes applicable to these fees. Estimated Health Insurer & Reinsurance Fees = \$36.00							
							

**Note:** Composite rates are calculated by aggregating the total premium across a four tier format. Important to note that billing changes are only allowed at policy anniversary date. Please carefully select the desired billing format for your enrolling client.

Account Information								
Account Information	Additional Information	Plan Selections	Member Census	<b>Rates</b>	Account Summary	Release for Enrollment		
Rates								
							<b>5</b>	

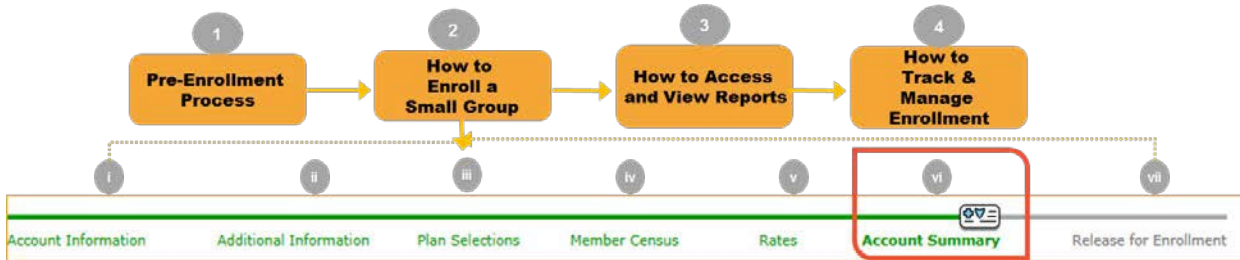
5. Click **Continue** to proceed to the **Account Summary** screen.

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## 2 How to Enroll a Small Group (Contd.)

### VI. Account Summary



#### Step vi: Account Summary:

The **Account Summary** screen allows you to review all of the input data by section. Review the information you have entered and revise if needed. Separate panels with scroll bars display key information from previous screens. Click **Change** in each panel to view the relevant page if you want to make any edits. If changes are made, click **Continue** to go back to the **Account Summary** screen. This ensures that all edits have been saved and rates have been adjusted if necessary.

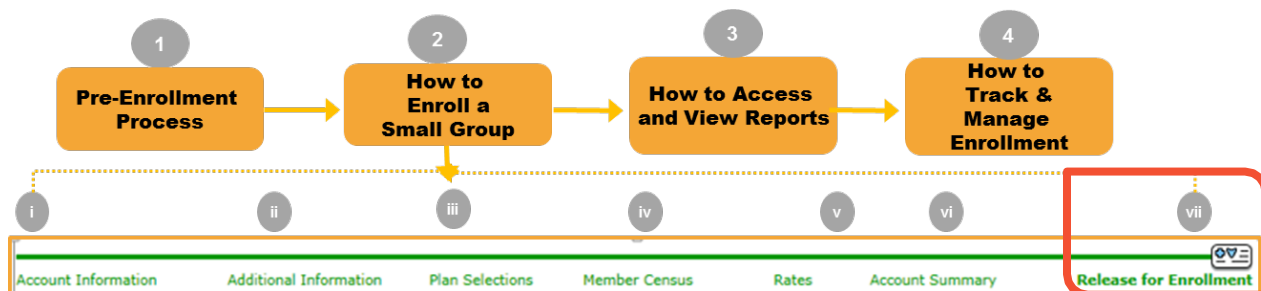
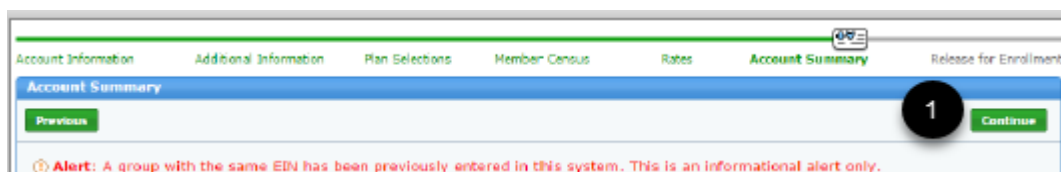
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## 2 How to Enroll a Small Group (Contd.)

### VI. Account Summary (contd.)

All the data that was entered on the **Rates** screen will be displayed.

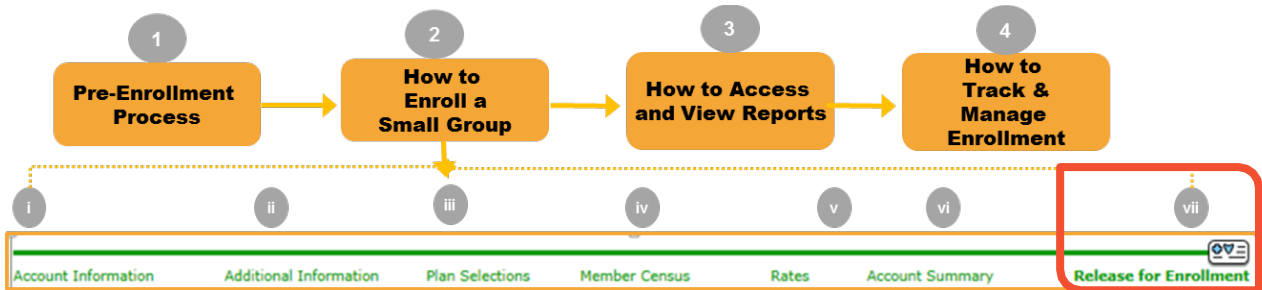
1. Click **Continue** to move to the **Release for Enrollment** screen.



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## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment



#### Step vii: Release for Enrollment

Based on the default required documents, under the **Documents Needed for Enrollment** section, the list will populate. Documents will be required based on the selections made during the data entry process. In order to release the case for enrollment successfully, these documents must be attached.

Document Name	Status	Requirement
* Benefit Program Application (BPA) for New Small Groups 2-50	Missing	Signature Required
* Employer Group Information (EGI) Form	Missing	Signature Required
* Enrollment Application/Change Form	Missing	Signature Required
* State filed proof of business	Missing	
* Wage & Tax Statement/Proof of Wages	Missing	
Affidavit of Domestic Partnership		Signature Required
BenefitWallet Discovery Form		
Dependent State Continuation of Coverage Form		Signature Required
Disabled Dependent Certification Form		Signature Required

\*- Required

I confirm that all uploaded documents requiring a signature have been signed. [Release](#)

1. Click **View/Attach Documents**. This will populate a pop-up window, allowing the user to search system files to find the appropriate document.

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## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment (contd.)

Before proceeding to the next steps, let's discuss the **Documents Needed for Enrollment** section. This section easily identifies Required and Optional Documents. Required documents are identified by **bolded red font** and asterisks.

The “*Missing*” or “*Attached*” indicator will only appear for the required documents.

Documents Needed for Enrollment		
* <b>Benefit Program Application (BPA) for New Small Groups 2-50</b>	✓ Attached	Signature Required
* <b>Employer Group Information (EGI) Form</b>	✓ Attached	Signature Required
* <b>Enrollment Application/Change Form</b>	✓ Attached	Signature Required
* <b>Wage &amp; Tax Statement/Proof of Wages</b>	✓ Attached	Signature Required
Affidavit of Domestic Partnership		Signature Required
BenefitWallet Discovery Form		
Dependent State Continuation of Coverage Form		Signature Required
Disabled Dependent Certification Form		Signature Required
Employer Representative Authorization (ERA)		
HSA Bank Discovery Form		

**Note:** Beginning with January 2017 Effective Dates, the **Composite Rate Billing Method Declaration Form** will no longer be a required document to submit when you select 4-Tier Composite Billing as your Rating Method. This information will be captured on the new BPS.

## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment (contd.)

2. Click **Browse** and locate the appropriate system folder and file.
3. Select the document type from the **Document Type** drop-down list.
4. Click **Attach File**. The document shows in the **Existing Attached Documents** section. If the wrong document has been attached, use **Delete Document** to remove the document.

**Attachments**

Select Browse to find a file(s) to attach. Uploaded files must be less than 50MB.

File	Document Type	Description
<input type="button" value="Choose Files"/> No file chosen <span style="float: right; border: 1px solid #ccc; padding: 2px;">Please Select</span>	<input type="button" value="Attach File"/>	

**Existing Attached Documents**

File	Date/Time Stamp	Document Type	Description
il_bpa_2_50.doc	09/06/2017 08:24:08	BENEFIT PROGRAM APPLICATION (BPA) FOR NEW SMALL GROUPS 2-50	
22997_small_group_standard_health_application (1).pdf	09/06/2017 08:24:07	EMPLOYER GROUP INFORMATION (EGI) FORM	
il-small-group-extension-form-v4.pdf	09/06/2017 08:24:07	WAGE & TAX STATEMENT/PROOF OF WAGES	
group_info_form.pdf	09/06/2017 08:24:07	ENROLLMENT APPLICATION/CHANGE FORM	

## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment (contd.)

**Attachments**

Select Browse to find a file(s) to attach. Uploaded files must be less than 50MB.

File	Document Type	Description
<input type="button" value="Choose Files"/> No file chosen	Please Select <input style="width: 100%;" type="text"/>	
<input type="button" value="Attach File"/>		

**Existing Attached Documents**

File	Date/Time Stamp	Document Type	Description
il_bpa_2_50.doc	09/06/2017 08:24:08	BENEFIT PROGRAM APPLICATION (BPA) FOR NEW SMALL GROUPS 2-50	▼
22997_small_group_standard_health_application (1).pdf	09/06/2017 08:24:07	EMPLOYER GROUP INFORMATION (EGI) FORM	▼
il-small-group-extension-form-v4.pdf	09/06/2017 08:24:07	WAGE & TAX STATEMENT/PROOF OF WAGES	▼
group_info_form.pdf	09/06/2017 08:24:07	ENROLLMENT APPLICATION/CHANGE FORM	▼

You can also upload multiple documents, if required. When uploading multiple documents you can to assign multiple Document Types to the documents.

Important information about attaching multiple documents

- You must select one Document Type in order to attach the selected documents. This document type will be applied to all the attachments. Click **Attach**.
- Use the drop-down arrows next to the specific document to change the type
- After changing the necessary document types, click **Save** When done, click **X** to return to the **Release for Enrollment** screen.

**Note:** The tool is compatible to support Zip files. A zip file may be uploaded and the applicable doc type selected. (i.e. employee applications) However, keep in mind that all required documents must be attached and document type selected, in order to release the group.

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## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment (contd.)

5. Once you close the Attachments window, you are re-directed to the **Release for Enrollment** screen. Select the '*I confirm that all uploaded documents requiring a signature have been signed*' check box.
6. Click **Release** to release the group to Underwriting for review.
7. Confirm your selections. These include: Rating Model, Plans, and the Effective Date for the group. Click **Confirm**.

5  I confirm that all uploaded documents requiring a signature have been signed. 6 **Release**

**Confirm Release for Enrollment**

I confirm that,

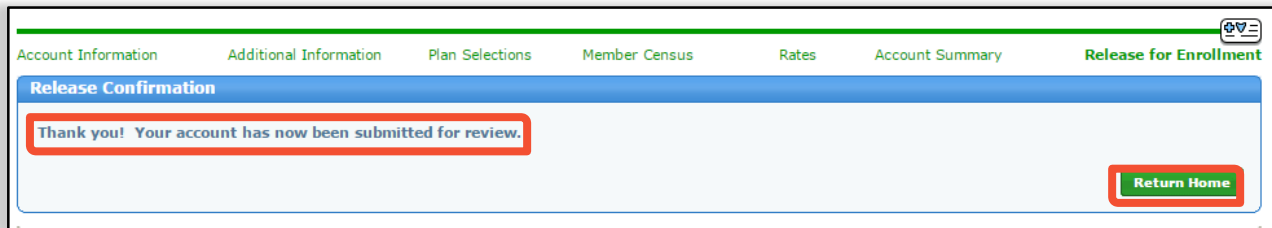
- I have selected Member Level Rating model.
- I have selected the below plan(s) for the group.  
P811PPO
- I have selected the effective date 05/01/2021 for the group.

7 **Confirm** Cancel

## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment (contd.)

After confirming, you receive a message saying **“Thank you! Your account has been submitted for review.”** At this point you can click **Return Home** to return to the home page.



Once you click **Release**, the group is in a read-only status. No additional changes can be made until after the Underwriter has reviewed the case. If the Underwriter requires additional information, an email will be sent to the address entered in the Producer section during the enrollment process. The case will then be open to you to go back in to the tool and enter/upload missing information or documents. Please add, edit or attach the requested data, then return the case to BCBS. If you require changes, prior to review or approval, please contact your sales representative as soon as possible.

#### Note:

- You need to ensure that all information is correct before submitting to BCBS. The only way to correct information entered into the system is if the Underwriter returns the case to the user for **More Info Required** with the reason code of **Data Change Needed**. Once submitted, you cannot edit data.

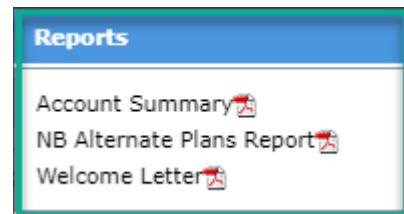


## 2 How to Enroll a Small Group (Contd.)

### VI. Account Summary Report

Let's discuss the Account Summary Report.

Now, the **Account Summary Report** is available on the Release for Enrollment screen. Click **Reports** to view the report.



It is recommended that this document be reviewed and approved by the client for accuracy and to ensure that all plans, rates, and census information are accurate **BEFORE** the case is released. You can also view and print the report after the case has been approved.

The Account Summary Report is **not** emailed. Please access it through **Reports** on the online tool.

Account Summary		BlueCross BlueShield of Texas	
October 10, 2016 ITG Test Broker2 901 South Central Expressway Richardson, TX 75080			
RE: TEST_TX_UG Account #:190797 Effective Date:10/15/2016			
<b>General Information:</b>			
Legal Name of Company: TEST_TX_UG	Employer Identification Number (EIN): 55555555		
Standard Industry Code (SIC): 0111	Description of SIC (Nature of Business): Wheat farms		
Policy Effective Date: 10/15/2016	County: Dallas		
Domestic Partner: N	TEFRA:		
ERISA: N	Waiting Period: 60		
COBRA: N	COBRA Admin: N		
Public Entity:	In-Vitro: N		
<b>Health Benefit Summary:</b>			
Blue Choice PPO Network - PPO Plans - P600HC: PLATINUM Plan: \$25/\$45 Office Copay/Specialist: \$250/\$500 DED In/Out: 80%/60% Coins In/Out: NA Coins Stoploss In/Out: \$0/\$10/\$35/\$75/\$150 Pharmacy: \$300/80% ER Copay/ER Coins: \$75 Urgent Care Copay: \$150/\$250 IP In/Out: \$100/\$200 OP Surg In/Out: 70%/70% Ped Dental In/Out			
Blue Choice PPO Network - PPO Plans - P601HC: PLATINUM Plan: \$25/\$45 Office Copay/Specialist: \$1250/\$2500 DED In/Out: 100%/100% Coins In/Out: NA Coins Stoploss In/Out: \$0/\$10/\$35/\$75/\$150 Pharmacy: \$300/100% ER Copay/ER Coins: \$75 Urgent Care Copay: \$150/\$250 IP In/Out: \$100/\$200 OP Surg In/Out: 70%/70% Ped Dental In/Out			

**Note:** Make sure that you review the data for accuracy prior to releasing the case. Once the case is released, no changes can be made. If additional information is required, you will be notified and your case will be opened to you to add the missing or requested information.

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## 2 How to Enroll a Small Group (Contd.)

### VII. Release for Enrollment (contd.)

The **Documents List** button in the header provides access to the list of required and optional documents required for enrollment. You can click where it says “Some of these forms are available for download [here](#)”. The BAP Downloadable Forms for Small Group Products will open in a new browser. From this browser, forms may be opened and saved for attachment in enrollment.

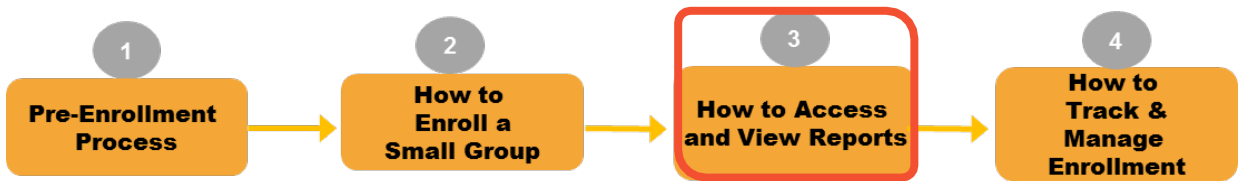
Documents List
Please remember to gather these documents to attach at the end of the enrollment process. Some of these forms are available for download <a href="#">here</a> .
<b>Required Documents</b>
Benefit Program Application (BPA) for New Small Groups 2-50
Employer Group Information (EGI) Form
Enrollment Application/Change Form
State filed proof of business
Wage & Tax Statement/Proof of Wages
<b>Optional Documents</b>
Affidavit of Domestic Partnership
BenefitWallet Discovery Form
Dependent State Continuation of Coverage Form
Disabled Dependent Certification Form
Employer Representative Authorization (ERA)
HSA Bank Discovery Form
Other
Small Group Certificate of Common Ownership
Supplemental Employment Verification Form
Texas Nine (9) Month State Continuation of Insurance Application Form

The screenshot shows the BlueCross BlueShield of Texas website. The main content area is titled "Downloadable Forms for Small Group Products". It includes a table of forms for small groups (Groups of 2-50).

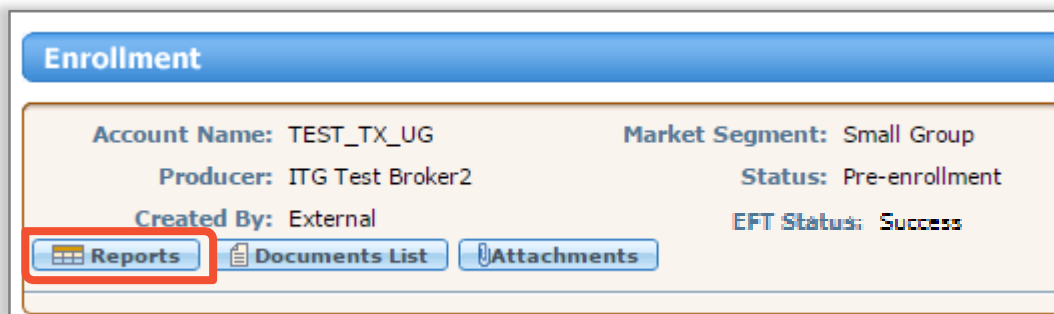
Stock # / Date	Enrollment Forms and Change Forms	Texas Form #
45331 0716	<a href="#">Affidavit of Domestic Partnership</a>	N/A
45331 0716sp	<a href="#">Affidavit of Domestic Partnership - Spanish</a>	N/A
N/A	<a href="#">Away From Home Care Guest Membership Application</a> - For HMO members	N/A
N/A	<a href="#">Away From Home Care Guest Membership Application - Spanish</a> - for HMO members	N/A
TXBPASG-OFF-EX 01 17	<a href="#">2017 Benefit Program Application (BPA) for New Small Groups 2-50</a> - for new accounts effective on or after 1/1/2017	N/A

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### 3 How to Access and View Reports



You can access and view reports by clicking **Reports** in the upper left-hand corner of each screen.



Types of documents accessible in the **Reports** tab include:

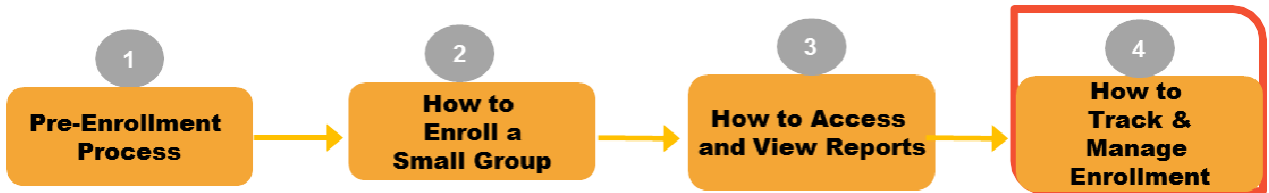
#### **Welcome Letter:**

The Welcome Letter is available after Underwriting approves the case. An email advising that the group has been approved will be sent to the producer or GA. You can then go into **Reports** to retrieve the Welcome Letter. The Welcome Letter itself will **NOT** be sent within the email.

**Account Summary:** The Account Summary Report will become available in the Reports List after **Continue** is clicked on the Account Summary screen.

## 4 How to Track and Manage Enrollment

### I. Enrollment Status



Once enrollment has been released, you can track the status of the case by searching the group from the **Enrollment** home page.

Enter information in any of the descriptor fields, or select the case from the “**Recently Accessed**” or “**My Enrollments**” section on the enrollment home screen. Once the group is selected, click **History**.

Enrollment Home	
<b>Account Number:</b> 190797	<b>Effective Date:</b> 10/15/2016
<b>Quote Number:</b> NA	<b>Case ID:</b> 13466
Log	History
<b>Send to BCBS</b>	

On the **Activity History** window, activities, along with activity date, status, and duration of activity are displayed. A list of activity and status definitions is also displayed.

**Note:** Quick status information can also be found in the header next to **Status**.

Activity History			
Activity Date	Activity	Status	Duration
10/10/2016	Enrollment More Info Required		0 Day(s)
10/10/2016	Underwriter Review	Completed	0 Day(s)
10/10/2016	Enrollment Data Entry	Completed	0 Day(s)
10/10/2016	Start	Completed	0 Day(s)

Activity	Status	Definition
Enrollment Data Entry	Pre-enrollment	Pre-enrollment status is defined as one of the following. 1. A producer or General Agent has initiated the enrollment process but has not submitted the case to BCBS yet. 2. BCBS has received enrollment paperwork and is reviewing for completeness. The case has not been submitted to Underwriting yet.
Pre-Enrollment More Info Needed	Pre-Enrollment More Info Needed	BCBS has requested additional information and the submitter is in the process of obtaining requested information.
Underwriter Review	Pending UW review or Subsequent UW review	Enrollment documentation has been submitted to Underwriting for review
Submitter Review	Not approved or Enrollment More Info Required	UW has completed review of submission and has returned the enrollment to the submitter either not approving the submission or requesting additional information in order to complete the review

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## 4 How to Track and Manage Enrollment (Contd.)

### I. Enrollment Status (contd.)

Enrollment Home	
<b>Account Number:</b> 190797	<b>Effective Date:</b> 10/15/2016
<b>Quote Number:</b> NA	<b>Case ID:</b> 13466
<input type="button" value="Log"/> <input type="button" value="History"/>	
<input type="button" value="Send to BCBS"/>	

Account Log	
Account Name: TEST_TX_UG	Account Number: 190797
<b>Log Entries</b>	
<p>Date: 10/10/2016 01:36:16            Type: Internal            Subject: Claimed Case            Added By: System</p> <p>Entry: The Case was claimed by batest35.</p>	
<p>Date: 10/10/2016 01:35:05            Type: Internal            Subject: AlacritiPaymentError            Added By: System</p> <p>Entry: The Routing Number you have entered is not valid. Please check the details and try again or contact us for assistance if you think this message is being shown in error (486)</p>	

Once the enrollment starts, details pertaining to the case are entered using the **Log** button.

For Example:

- If Underwriting indicates more information is required, a copy of the notes and reason codes will be added to the **Log** for your review. This will be the same information that would have been included in the email notification. Or you can also attach a separate document to provide additional clarification to the underwriter as needed.

## 4 How to Track and Manage Enrollment (Contd.)

### II. More Information Required

In this example, once you have released the group for enrollment, the Underwriter reviews the case and sends an email notification requesting for more information.

The email notification includes the information that is required to complete the enrollment review. In this example, the underwriter requires completed documents from the Producer.

**Sample “More Information Required” email notification is below.**

Blue Cross Blue Shield of Texas (BCBSTX) requires additional information to continue reviewing the small employer group coverage enrollment for TEST\_TX\_UG Case ID #13425. The following information needs to be updated or provided:

- Missing/Incorrect/Incomplete Document (s)

**Missing/Incorrect/Incomplete Document (s):**

State filed proof of business - Incomplete

Wage & Tax Statement/Proof of Wages - Incomplete

**Additional Notes:** Incomplete Documents

Please return to eSales ACA Small Group Enrollment to search for this Case ID and make the necessary updates.

Please do not reply to this email. For questions, please call our Service Center at 800-399-5831 to coordinate resolution.

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## 4 How to Track and Manage Enrollment (Contd.)

### II. More Information Required (contd.)

You will receive automated email notifications from the tool for cases that have been aging in the “*Enrollment More Info Required*” status. These emails will be sent to the email address that was provided on the Account Information screen during the initial data entry. A reminder email will be sent on the 3<sup>rd</sup>, 5<sup>th</sup> and 7<sup>th</sup> day if the case has not been returned to Underwriting. The case will be auto-discontinued 60 days after the Effective Date if the case is not returned to BCBS.

**Sample of the Aging Alert email is below.**

Blue Cross Blue Shield of Texas (BCBSTX) requires additional information to continue reviewing the small employer group coverage enrollment for TEST\_TX\_UG Case ID #13466. The case has been pended for 3 days and it needs your immediate attention in order to process it further. The following information needs to be updated or provided:

- Missing/Incorrect/Incomplete Document (s)

State filed proof of business - Incomplete  
Wage & Tax Statement/Proof of Wages - Incomplete

**Additional Notes:** Incomplete Documents.

Please return to eSales ACA Small Group Enrollment to search for this Case ID and make the necessary updates.

Please do not reply to this email. For questions, please call our service center at 800-399-5831 to coordinate resolution.

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## 4 How to Track and Manage Enrollment (Contd.)

### II. More Information Required (contd.)

Once you receive an email notification from the Underwriting team, you logon to the eSales Tools.

If Underwriting needs more information you may need to add or update information in one of the fields within the tool, as well as add some missing documentation.

In this example, you need to upload completed documents. You move to the **Release for Enrollment** screen and add the requested documents. Then, on this screen, you click **Send to BCBS** and then **OK**. The case will be returned to Underwriting for approval. The status of the case will be updated to “Pending UW Review”.

The screenshot shows the BlueCross BlueShield of Texas eSales Tools interface. The top navigation bar includes the company logo, contact information, and the user's name 'ITBroker2 Test' with a 'Log Out' button. The main content area is titled 'Release for Enrollment' and displays account details such as 'Account Name: TEST\_TX\_UG', 'Market Segment: Small Group', and 'Effective Date: 01/01/2018'. A 'Send to BCBS' button is highlighted in red. Below this, a list of documents needed for enrollment is shown, including 'Employer Group Information (EGI) Form', 'Enrollment Application/Change Form', and 'Wage & Tax Statement/Proof of Wages'. A confirmation dialog box is open, asking 'Are you sure you wish to send this to BCBS?' with 'OK' and 'Cancel' buttons. The 'OK' button is highlighted in red.

When an account is in the “**More Information Required**” activity, the “**Send to BCBS**” button will be available on all enrollment screens unless a **Data Change** is required by the Underwriter. If “**Data Change Needed**” is selected, the user will need to navigate to the **Account Summary** screen to use the “**Send to BCBS**” button and return the case for approval.

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## 4 How to Track and Manage Enrollment (Contd.)

### II. More Information Required (contd.)

You can add a log entry for this activity. Click **Log**, and **Add Entry** to communicate directly with the assigned Underwriter. Use the log entry to provide additional details pertaining to your case.

Once you click the **Send back to BCBS** button in the "*More Info Required*" activity, a system log entry is created.

**Account Log**

Account Name: TEST\_TX\_UG Account Number: 190797

**Add Entry**

Subject :  
Completed Documents Submitted

Body :  
As per the email received, submitted the completed documents.

Save

Log Entries

**Account Log**

Account Name: TEST\_TX\_UG Account Number: 190797

**Add Entry**

**Log Entries**

Date: 10/10/2016 01:29:59  
Type: Internal  
Subject: Completed Documents Submitted  
Added By: ITBroker2 Test

Entry: As per the email received, submitted the completed documents

## 4 How to Track and Manage Enrollment (Contd.)

### III. Underwriting Approval Received

An email notification will be sent to the General Agent (if applicable) or the Producer once the case has been approved by Underwriting.


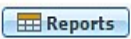

Sample 'Enrollment Approved' email below.

Blue Cross and Blue Shield of Texas (BCBSTX) has approved TEST\_TX\_UG for small group employer coverage with an effective date of 10/15/2016.

BCBSTX is in the process of finalizing your group's enrollment. You will receive another email notification after Identification Cards have been requested.

To access the Welcome Letter for this account's enrollment, log into eSales using the below link and instructions:

<https://producers.hcsc.net/producers/login>

1. Select **ACA Small Group Enrollment** from eSales Home Page
2. Search for your account in enrollment, once found, select the  **View** option next to the account name
3. From the account information page select  **Reports**
4. Select **Welcome Letter** 

Thank you for your business.

Please do not reply to this e-mail. This e-mail box is designated for outgoing messages only.

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## 4 How to Track and Manage Enrollment (Contd.)

### III. Underwriting Approval Received (contd.)

The Welcome Letter is available after Underwriting approves the group. An email advising that the group has been approved is sent to the producer or GA. You can then click **Reports** in the tool and retrieve the Welcome Letter. The Welcome Letter itself is **NOT** sent within the email. An email is also sent once membership is complete.

Sample “Welcome Letter” below.

<b>Welcome Letter</b>				<b>BlueCross BlueShield of Texas</b>			
October 10, 2016 ITG Test Broker2 901 South Central Expressway Richardson, TX 75080							
RE: TEST_TX_UG Account #:190797 Effective Date:10/15/2016							
TEST_TX_UG has been approved and your rates are indicated below. These rates are effective 10/15/2016.							
Enrollment information, including member applications, is being processed. Member ID cards will be mailed shortly. Thank you for your continued business.							
<b>General Information:</b>							
<u>Waiting Period:</u> 60	<u>COBRA:</u> N	<u>COBRA Admin:</u> N	<u>TEFRA:</u>	<u>Public Entity:</u>	<u>County:</u> Dallas	<u>In-Vitro:</u> N	<u>Domestic Partner:</u> N
<b>Benefit Summary:</b>							
Blue Choice PPO Network - PPO Plans - P600CHC: PLATINUM Plan; \$25/\$45 Office Copay/Specialist; \$250/\$500 DED In/Out; 80%/60% Coins In/Out; NA Coins Stoploss In/Out; \$0/\$10/\$35/\$75/\$150 Pharmacy; \$300/80% ER Copay/ER Coins; \$75 Urgent Care Copay; \$150/\$250 IP In/Out; \$100/\$200 OP Surg In/Out; 70%/70% Ped Dental In/Out							
Blue Choice PPO Network - PPO Plans - P601CHC: PLATINUM Plan; \$25/\$45 Office Copay/Specialist; \$1250/\$2500 DED In/Out; 100%/100% Coins In/Out; NA Coins Stoploss In/Out; \$0/\$10/\$35/\$75/\$150 Pharmacy; \$300/100% ER Copay/ER Coins; \$75 Urgent Care Copay; \$150/\$250 IP In/Out; \$100/\$200 OP Surg In/Out; 70%/70% Ped Dental In/Out							

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## 4 How to Track and Manage Enrollment (Contd.)

### III. Underwriting Approval Received (contd.)

**Temporary ID Cards:** An email notification is sent to the General Agent (if applicable) or the Producer when ID cards are released, indicating that temporary ID cards are available as of the effective date of the group.

Sample 'ID Cards Released' email below.

Membership processing for TEST\_TX\_UG (Account # 190797) is complete and member ID cards have been requested. Temporary ID cards will be available as of the effective date of the account. To access temporary IDs for members of this account, follow these steps:

1. Log into Blue Access for Producers (BAP) using the following link: <https://producers.hcsc.net/producers/login>
2. From the BAP homepage, click the Blue Access for Employers (BAE) icon to access the BAE Account Search screen.
3. Select an account name from the listing. A maximum of 200 accounts will be listed.
4. If the account name is not listed, enter the name in the search fields and click **Find**.
5. Find the employee or dependent by using one of two search methods:  
Search Option 1:
  - a. On the BAE homepage, select the **Request/Print ID Card** option from the "I want to" menu.
  - b. Select the **Employee** or **Dependent** radio button as appropriate.
  - c. Enter the employee or dependent's SSN/ID Number or Last Name.
- d. Click the **Find** button.
- Search Option 2:
  - a. On the BAE homepage, click **Employee Maintenance** then **View/Update Employee** in the left-hand menu bar.
  - b. Select the **Employee** or **Dependent** radio button as appropriate.
  - c. Enter the employee or dependent's SSN/ID Number or Last Name.
  - d. Select **Request/Print ID Card** from the "I want to" menu.
  - e. Click the **Find** button.
6. Click on the employee or dependent's name in the Search Results table to be taken to the Request/Print ID Card screen.
7. To print a temporary ID card, click on the **Print a temporary ID card** link.
8. To email a temporary ID card, click on the **Email a temporary ID card** link.
9. Follow the instructions on the screen.
10. Click the **Confirm** button

Thank you for your business.

Please do not reply to this e-mail. For questions, please call our Service Center at 800-399-5831 to coordinate resolution.

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## 4 How to Track and Manage Enrollment (Contd.)

### III. Underwriting Approval Received (contd.)

Once your case completes the ID Cards Released and Release Initial Bill activities, your case enrollment is complete.

Enrollment		Enrollment Home	
Account Name: TEST_TX_UG	Market Segment: Small Group	Account Number: 190797	Effective Date: 10/15/2016
Producer: ITG Test Broker2	<b>Status: Enrollment Completed</b>	Quote Number: NA	Case ID: 13466
Created By: External			
<a href="#">Reports</a>	<a href="#">Documents List</a>	<a href="#">Attachments</a>	EFT Status: Success
		<a href="#">Log</a>	<a href="#">History</a>

**Note:** If the case is not approved for enrollment by Underwriting, a **Not Approved** email notification is sent to the Producer or GAs with the reason code(s). Contact our Service Center at 1-800-399-5831 if you have questions regarding a case that is not approved.

## 4 How to Track and Manage Enrollment (Contd.)

### Search Functionality
















- From the Enrollment Home screen, you can now press the Enter key, on your keyboard, to submit your search request in addition to clicking the **Search** button on the screen.
- You can now search “In Process” or “Completed” enrollments by the account's nine-digit Employer Identification Number (EIN).

The screenshot displays the 'Enrollment' search interface. At the top, there is a blue header with 'Enrollment' on the left and 'Enrollment Home' on the right. Below the header, the main search area is titled 'Search Existing Accounts/Quotes' with a dropdown arrow. Underneath, there is a prompt: 'Search by Quoted status to start enrolling a quoted prospect, or **Start Enrollment without a Quote**'. The search form includes several input fields: 'Account Name', 'Agent', 'Division: Texas', 'Quote Number', 'Account Number', 'Case ID', 'Status' (a dropdown menu), 'Effective Date', and 'EIN'. The 'EIN' field is highlighted with a red box. To the right of the 'EIN' field, there is a 'Search' button with a magnifying glass icon and a 'Clear' button. The 'Search' button is also highlighted with a red box.

## 4 How to Track and Manage Enrollment (Contd.)

### IV. My Enrollments

During enrollment, if you want to view the status of the case, you can check the **My Enrollments** section of the enrollment tool. This section lists all cases currently in the enrollment process. The section will list the enrollments that you have enrolled using the tool yourself. You may sort columns for easy tracking.





















My Enrollments							
Account	Account #	Effective Date	Sales Executive	Division	Status	Last Activity	
 ANGELA TEST 3	003531	12/01/2015		TX	Enrollment More Info Required	10/05/2015	
 AMATEST TX 0928 AGING	177522	10/01/2016		TX	Enrollment More Info Required	09/29/2016	
 TX EXT TEST TI 07052016	176873	08/01/2016		TX	Enrollment More Info Required	08/03/2016	
 TEST_TX_UG	190790	10/15/2016		TX	Enrollment More Info Required	10/10/2016	
 AMATEST TX 1009 EXT	190795	11/01/2016		TX	Pending UW review	10/09/2016	
 AMATEST TX 1007 RC EXT	190785	11/01/2016		TX	Pending UW review	10/07/2016	
 AMATEST TX 1006 EXT	177572	11/01/2016		TX	Pending UW review	10/06/2016	
 EXT RPTS TEST TI 08032016	177034	09/01/2016		TX	Pending UW review	08/03/2016	
 TEST TX BROKER DEMO	187385	01/01/2016		TX	Pending UW review	05/19/2016	
 NATEST_TXEXT0310	184892	04/01/2016		TX	Pending UW review	04/04/2016	
 AMATEST FSE ADV TX EXT 1	177547	11/01/2016		TX	Pending UW review	10/04/2016	
 AMATEST_TX_1_1005	177568	11/01/2016		TX	Complete Acct/Membership entry	10/05/2016	
 LAURA TX HMO ONLY	186243	06/01/2016		TX	Complete Acct/Membership entry	04/19/2016	
 LAURA 092315 TEST EXTERNAL	003351	12/01/2015		TX	Complete Acct/Membership entry	10/02/2015	
 TX_UG	177549	10/15/2016		TX	Enrollment Internal Action Required	10/05/2016	

**Note:** Those cases that have aged after 2 days of inactivity in the “*Enrollment More Info Required*” status, the enrollment tool will highlight them in an Orange color, within the *Recently Accessed* and *My Enrollment* sections of the Enrollment home page, for awareness.

## 4 How to Track and Manage Enrollment (Contd.)

### IV. My Enrollments (contd.)

The **Recently Accessed** section lists all the enrollments that you have searched and viewed. This could be a combination of cases enrolled by yourself or by BCBS.

Recently Accessed						
Account	Effective Date	Sales Executive	Division	Status	Last Activity	
 <a href="#">View</a> TEST_TX_UG	10/15/2016		TX	Enrollment Completed	10/10/2016	
 <a href="#">View</a> TEST_TX_UG	10/15/2016		TX	Enrollment More Info Required	10/10/2016	
 <a href="#">View</a> TX_UG	10/15/2016		TX	Pre-enrollment	10/10/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/10/2016	
 <a href="#">View</a> AMATEST TX 1009 EXT	11/01/2016		TX	Pending UW review	10/09/2016	
 <a href="#">View</a> JPM R4 TOUCHPOINT AGING AND EMAILS	01/01/2017		TX	In Progress	10/07/2016	
 <a href="#">View</a> AMATEST TX 1007 RC EXT	11/01/2016		TX	Pending UW review	10/07/2016	
 <a href="#">View</a> TEST_TX_UG	10/01/2016		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> TEXT_TX_UG	10/15/2016		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016	
 <a href="#">View</a> AMATEST TX 1006 EXT	11/01/2016		TX	Pending UW review	10/06/2016	
 <a href="#">View</a> AMATEST SS 1006	01/01/2017		TX	Pre-enrollment	10/06/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/05/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/05/2016	
 <a href="#">View</a> AMATEST_TX_1_1005	11/01/2016		TX	Complete Acct/Membership entry	10/05/2016	
 <a href="#">View</a> SYS Account Name Place Holder	-		TX	Pre-enrollment	10/05/2016	

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## Resources and Help

For technical issues with the eSales enrollment tool, please contact our ITG Service Center at **1-888-706-0583**.

If there are any questions regarding any of the information within the user manual or the enrollment process, please feel free to email us at:

[SGMM\\_TechSupport@hcsc.com](mailto:SGMM_TechSupport@hcsc.com)