



**BlueCross BlueShield
of Texas**

MID-MARKET ENROLLING A NEW GROUP: ENROLLMENT TOOL USER GUIDE

Created by: RCoE Testing & Training

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Regulatory Requirements:

The Regulatory Requirements pertaining to non-discrimination based on health status as well as non-discrimination based on race, color, national origin, sex, age, or disability. Underwriters should not establish or approve separate rules for initial and/or continued eligibility, or separate premium rates that would apply discriminately to an individual member of a group based on any of these factors.

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 Group Enrollment tool.

Overview of the Enrollment Process

The eSales Small Group & Middle Market 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.

Enrolling a New Group



Once you have gathered the necessary information and documentation from your client, you access the eSales **Small Group & Middle Market 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.

Group Sales Tool Application: Login

Step	Action
	<p>When enrolling a case, click on the Small Group and Middle Market Enrollment link.</p> <div data-bbox="337 604 912 821" style="border: 1px solid black; padding: 5px;"> <p>Small Group & Middle Market Enrollment</p> <ul style="list-style-type: none"> • Metallic Plans for Small Group Prospects with 50 or fewer total employees • Standard Insured Plans for Middle Market Prospects with 51+ total employees </div> <p>Result: The Enrollment window opens.</p>



Enrollment with a Quote

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

Start Enrollment by Accessing Your Final Quote: A group can be enrolled with a quote and some of the information such as the Market Segment and Division will transfer over from the quoting system.

Step	Action												
<p>Enrollment</p>	<p>On the Group Sales Enrollment Page, search Status “QUOTED” and enter the “Quote ID” in the Quote Number Field. If the Quote ID is not available. Search by the account name.</p> <div data-bbox="334 470 1576 789" style="border: 1px solid #ccc; padding: 10px;"> <p>Search Existing Accounts/Quotes ▾</p> <p>Search by Quoted status to start enrolling a quoted prospect, or Start SG Enrollment without a Quote</p> <p>Account Name: <input type="text"/> Quote Number: <input type="text" value="1147099"/> Status: <input type="text" value="Quoted"/> ▾</p> <p>Agent: <input type="text"/> Account Number: <input type="text"/> Effective Date: <input type="text"/></p> <p>Division: Texas Case ID: <input type="text"/> Market Segment: <input type="text" value="All"/> ▾</p> <p>EIN: <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Search"/> <input type="button" value="Clear"/></p> <p style="text-align: center;">1 - 1 of 1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Prospect</th> <th>Effective Date</th> <th>Agent</th> <th>Sales Executive</th> <th>Market Segment</th> <th>Quote #</th> </tr> </thead> <tbody> <tr> <td>Start Enrollment TX 2 9 Demo Quote</td> <td>03/01/2021</td> <td>JUAN NAVARRO</td> <td></td> <td>MM</td> <td>1147099</td> </tr> </tbody> </table> </div> <p>Click Start Enrollment to begin the Enrollment process.</p>	Prospect	Effective Date	Agent	Sales Executive	Market Segment	Quote #	Start Enrollment TX 2 9 Demo Quote	03/01/2021	JUAN NAVARRO		MM	1147099
Prospect	Effective Date	Agent	Sales Executive	Market Segment	Quote #								
Start Enrollment TX 2 9 Demo Quote	03/01/2021	JUAN NAVARRO		MM	1147099								
<p>Enrollment Home Page</p> <p>Account Information</p>	<p>The Enrollment Home Page: Account Information Page will display for Enrollment Data Entry completion.</p> <div data-bbox="334 856 1576 1371" style="border: 1px solid #ccc; padding: 10px;"> </div>												
<p>Enrollment Home Page</p>	<p>The Account Information header on the Enrollment Home page includes the following information:</p> <ul style="list-style-type: none"> • Account Name • Market Segment • Account Number • Effective Date • Producer • Status • Quote Number • Case ID • Created By • DocuSign Envelop ID (when applicable) 												

Account Name: SONYA TXMMQUOTE 2.10 Market Segment: Middle Market Account Number: Effective Date: 03/01/2021
 Producer: JUAN NAVARRO Status: Pre-enrollment Quote Number: 1147155 Case ID: 288253
 Created By: External

DocuSign Envelope ID:

The header information includes additional buttons available during enrollment.

- **Reports:** Opens a list of available reports (only available after UW approval.)
- **Documents List:** Opens a list of required documents.
- **Attachments:** Opens all account enrollment paperwork attachments.
 - All active attachments are transferred from Request Center into Enrollment
- **Discontinue:** A case can be discontinued at any time during the enrollment process by clicking the Discontinue button. Enrolling cases that have not been released for enrollment review will be auto discontinued by the system 60 days from the effective date
- **Log:** Opens a text box used to enter or review notes.
 - Once the user begins enrolling, account details can be entered in the LOG. The LOG will be utilized by all users per assigned case for additional notated information when applicable up to and including missing information and Producer/Sales follow up documentation.
 - Any follow up information details should be added to the LOG.

Note: If there have *not* been any notes added to the Log, the radio button will appear blue, however once notes are added, the Log radio button will appear orange.

Case ID: 285730

Log
 History

Account Log

Account Name: TX Test DEMO Account Number:

Add Entry

Log Entries

- **History:** Opens the Activity History window that shows the Activity Date, Activity, Status, and Duration of an account.

Account Log

Account Name: TX Test DEMO Account Number:

Add Entry

Log Entries

Enrollment Home Page

General Information

General Information Section:

General Information

*Employer's Legal Name: *Does this group cover domestic partners?: Yes No

*Employer ID Number (EIN): *Is Group subject to COBRA?: Yes No

*SIC Code: -Legal services

*Policy Effective Date: ▾

*Case Submitted to BCBS:

Sales Rep. R/D/T: / /

Blue Access for Employers (BAE)

Contact Name: Contact Title:

Phone (numbers only): Ext. E-Mail Address:

Enter all required information on the **General Information** page using the paperwork as the source document. Some data entered in the quoting system will be carried forward to the enrollment system however, the Producer/GA is responsible for changing data in enrollment to match paperwork. All fields marked with an asterisk (*) are required.

- Answer Yes or No for the following questions:

*Does this group cover domestic partners?: Yes No

*Is Group subject to COBRA?: Yes No

Note1: Once the company EIN is entered, an alert will appear if there is an account in workflow with the same EIN. The alert reads "**Alert: A group with the same EIN has been previously entered in this system. This is an informational alert only.**" If the Producer/GA receives this alert, they will confirm the EIN with the client and make applicable updates. However, the tool will still allow you to enroll the case.

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

Note2: When a **Blue Access for Employers (BAE)** contact, name is entered, the email address field becomes required.

Employee Retirement Income Security Act (ERISA)

Employee Retirement Income Security Act (ERISA):

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:

Answer the ‘Employee Retirement Income Security Act (ERISA)’ question.

Note: Additional fields open when the **Yes** radio button is selected

The ERISA Plan Sponsor and, ERISA Plan Year beginning, and end date are required fields. Complete all required fields.

Physical Address/Contact Information

Physical Address/Contact Information:

Enter the Company’s Physical Address/Contact Information.

If there are separate physical and mailing addresses, select the **yes** radio button for billing and **no** for mailing address to populate the additional information. If the ‘**Yes**’ radio buttons are checked for **billing** and/or **mailing addresses**, additional fields will populate. Enter all required information.

Physical Address/Contact Information

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

*Address 1: Address 2:

*City: State: Texas

*Zip Code: 75080 *County: Collin

*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: The County will default based on the zip code entered, unless it is a shared zip code. When there is a shared zip code “Please select” will populate in the Zip Code field.

*County: Please Select

An informational message including the link to USPS.com populates instructing the user to visit USPS to locate the appropriate county.

Find Zip Code (County) using USPS.com

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

Click on the Visit USPS link to go to the USPS.com web page.

In the USPS.com web page, click Quick Tools and select Look Up a Zip Code.



In the **Zip Code by Address** tab, enter the accounts **Street Address, City**, select **State** from drop down and click the **Find** radio button.



ZIP Code™ by Address

Enter a street address along with city and state OR enter a street address and ZIP Code™. ⓘ

*Indicate a required field

Company

Street Address

App/Suite/Other

City

State

ZIP Code™

Find

Select County

Result: the full address populates

ZIP Code™ by Address

You entered:
 16731 COIT RD
 DALLAS TX

If more than one address matches the information provided, try narrowing your search by entering a street address and, if applicable, a unit number. **Edit and search again.**

16731 COIT RD
 DALLAS TX 75248-1750

Click on the to expand the address to see the county.

Result: The mailing industry details window expands and the County for that address is listed.

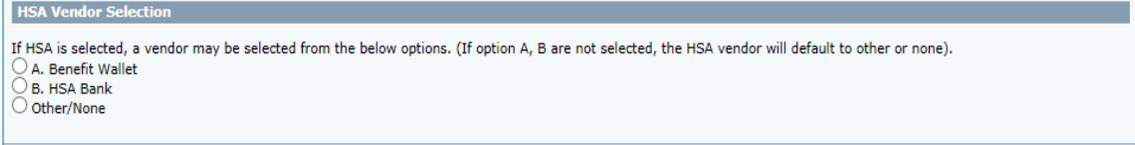
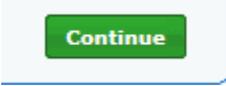
16731 COIT RD
 DALLAS TX 75248-1750

CARRIER ROUTE
 C006

COUNTY
 DALLAS

Select this county from the dropdown in the County Field (Group Sales)

<p>Address Message</p>	<p>If the Producer/GA receives a message that states <i>“The address provided appears to be incorrect. Please input the correct address.”</i>, Verify the address has been entered correctly and click on the “here” link to continue the enrollment data entry.</p> <div data-bbox="342 304 1122 411" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Attention</p> <p> The Address provided appears to be incorrect. Please input the correct Address. To continue with the address as entered, click here . An Incorrect address or zip code may result in incorrect rates.</p> </div>
<p>Producer Information</p>	<p>In the Producer Information section</p> <p>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: <i>“The email addresses do not match”</i>. Enter the email address. Renter the email address to validate it.</p> <div data-bbox="329 667 1560 1297" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Producer Information</p> <p>Primary Producer</p> <p>*Primary Producer Name: <input type="text" value="JUAN NAVARRO"/> <input type="button" value="Find"/> <input type="button" value="Clear"/></p> <p>*Tax ID/SSN: 451584905 *Producer #: 000001023</p> <p>*E-Mail Address: <input type="text"/> *Confirm E-Mail Address: <input type="text"/></p> <p>Telephone #: <input type="text" value="9565852677"/> Complete Address: 119 E 12th St</p> <p>Fax #: <input type="text" value="9565852677"/></p> <p> Please reach out to your Sales Representative if there are multiple producers involved and commissions need to be split.</p> <p>General Agent</p> <p>General Agent Name: <input type="text"/> <input type="button" value="Find"/> <input type="button" value="Clear"/></p> <p>Tax ID/SSN: <input type="text"/> Producer #: <input type="text"/></p> <p>E-Mail Address: <input type="text"/> Confirm E-Mail Address: <input type="text"/></p> <p>Telephone #: <input type="text"/> Complete Address: <input type="text"/></p> <p>Fax #: <input type="text"/></p> <p>Subproducer</p> <p>Subproducer Name: <input type="text"/> <input type="button" value="Find"/> <input type="button" value="Clear"/></p> <p>Subproducer #: <input type="text"/></p> <p>* - Required <input type="button" value="Continue"/></p> </div>
<p>Continue Button</p>	<p>Click the green Continue radio button to move to the Additional Information page.</p> <div data-bbox="329 1392 516 1440" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="text-align: center;"><input type="button" value="Continue"/></p> </div>
<p>Additional Information</p>	<p>Next, you will enter additional group level information.</p> <ul style="list-style-type: none"> • Answer Yes or No for the following questions: <ul style="list-style-type: none"> ○ Public Entity ○ Include Retirees • Select Current Health Carrier from the dropdown list <div data-bbox="337 1663 1268 1850" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Additional Information</p> <p style="text-align: left;"><input type="button" value="Previous"/> <input type="button" value="Continue"/></p> <p style="text-align: center;">Public Entity: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p style="text-align: center;">Include Retirees: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>*Current Health Carrier: <input type="text"/></p> </div>

<p>Additional Information Eligibility</p>	 <p>Check “Yes” or “No” to the <i>“Waive the waiting period on initial enrollment?”</i> question based on paperwork.</p> <p>Note 1: If “No” is selected for the <i>“Waive the waiting period on initial Enrollment”</i>, then <i>“Number of Employees serving waiting period”</i> field will populate and become a required field. If yes is selected, this field will not be visible.</p>  <p>Note 2: If group selects No, member effective dates would be required for any applications received where the member is within the groups waiting period. If group selects Yes, member effective dates are not needed on enrollment applications</p> <p>Enter the Eligibility Date information. The eligibility date defaults based on the groups effective date (EX: 1st or 15th of the month). Select appropriate days of employment from drop down (EX: 0,30,60)</p> 
<p>HSA Vendor Selection</p>	<p>If an HSA plan is selected on the paperwork, and HSA Bank or Benefit Wallet is the vendor, check the appropriate vendor from the available options. If no vendor is selected or one other than HSA Bank or Benefit Wallet is selected on the paperwork check <i>“Other/None”</i>.</p>  <p>If an HSA plan was not selected, this field may be left blank</p>
<p>Continue Button</p>	<p>Click the green Continue radio button to move to the Additional Information page.</p> 
<p>Plan Selection Options and Offers</p>	<p>Plan Selections page: Using the documentation provided, select the appropriate health, dental, vision and life plans as applicable. All fields marked with an asterisk (*) are required.</p> <p>HMO Plan: HMO plans are specific to the state that offers it. If a group is selecting an HMO plan and has applicants who reside out of the State of Texas, the group must select a PPO plan to enroll the out of state applicants. Confirm that all enrollees selecting the HMO plan live within the State, if not request clarification.</p> <p>Note: The “Yes” radio button will default for Health, however if the group has not elected a Health plan (EX: dental only group) then the “No” radio button must be checked.</p>

The screenshot shows the 'Plan Selections' page with a 'Previous' button on the left and a 'Continue' button on the right. Below the navigation is a 'View Plans Request/Response' link. The 'Health' status is set to 'No'. Under 'Options and Offers', there are two sections: 'PPO and HMO Options' and 'HMO Options'. The 'PPO and HMO Options' section includes 'In-Vitro Fertilization' with 'Decline' selected. The 'HMO Options' section includes 'Speech & Hearing' with 'Decline' selected.

Options and Offers

In-Vitro (PPO and HMO) and Speech & Hearing (HMO only) defaults as “Decline” but can be changed to “Accept” if group elects this coverage on the BPA

The screenshot shows the 'Plan Selections' page with a 'Previous' button on the left and a 'Continue' button on the right. Below the navigation is a 'View Plans Request/Response' link. The 'Health' status is set to 'No'. Under 'Options and Offers', there are two sections: 'PPO and HMO Options' and 'HMO Options'. The 'PPO and HMO Options' section includes 'In-Vitro Fertilization' with 'Decline' selected. The 'HMO Options' section includes 'Speech & Hearing' with 'Decline' selected. Below this is a table titled 'BlueChoice - PPO'.

Plan #	Ded In/Out	Coins In/Out	OPX In/Out	Office Visit/Specialist	ER Copay/ER Coins	IP In/Out	OP Surg In/Out	Preferred Rx
<input type="checkbox"/> MTBCP002**P	\$500/\$10000	100%/50%	\$1500/Unlimited	\$30/\$60	\$500/100%	100%/50%	100%/50%	\$0/\$10/\$50/\$100/\$150/\$250
<input type="checkbox"/> MTBCP006**P	\$500/\$1000	80%/60%	\$3000/Unlimited	\$30/\$60	\$500/80%	80%/60%	80%/60%	\$0/\$10/\$50/\$100/\$150/\$250
<input type="checkbox"/> MTBCP004**P	\$500/\$10000	70%/50%	\$1500/Unlimited	\$30/\$60	\$500/70%	70%/50%	70%/50%	\$0/\$10/\$50/\$100/\$150/\$250
<input type="checkbox"/> MTBCP005**P	\$500/\$10000	60%/50%	\$1500/Unlimited	\$30/\$60	\$500/60%	60%/50%	60%/50%	\$0/\$10/\$50/\$100/\$150/\$250

Dental Plan Selection

The Dental radio button will default to ‘No.’ When the ‘Yes’ radio button is selected; the product selection fields will populate. Select the applicable dental plan.

The screenshot shows the 'Ancillary Products - Dental' section with a 'Yes' radio button selected. Below this is a table titled 'PPO Dental - BlueCare Dental PPO'.

Plan ID ³	Plan Type	Deductible In/Out ²	Annual Benefit Maximum	Out-of-Network Reimb.	Coinsurance		Orthodontia Lifetime Maximum
					In-Network	Out-of-Network	
Contributory Group							
High Allocation							
<input checked="" type="checkbox"/> DTNHR31**	Passive	\$25	\$3000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$2000
<input type="checkbox"/> DTNHR32**	Passive	\$50	\$2000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$2000
<input type="checkbox"/> DTNHR33**	Passive	\$50	\$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$1500
<input type="checkbox"/> DTNHR34**	Passive	\$50	\$1000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	\$1000
<input type="checkbox"/> DTNHR39	Passive	\$50	\$1500	MAC	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/> DTNHR41**	Passive	\$25	\$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
<input type="checkbox"/> DTNHR50	Passive	\$50	\$1500	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
<input type="checkbox"/> DTNHR57**	Passive	\$50	\$1500	MAC	100%/100%/60%/50%	100%/100%/60%/50%	\$1500

Life Selection

The Life radio button will default “No”.

The screenshot shows the 'Life' selection radio buttons with 'No' selected.

Continue Button

Click the green Continue radio button to move to the Additional Information page.

The screenshot shows a green 'Continue' button.

Member Census

Click on Import Census

The Import Census Window Displays

Click Browse to locate the saved census

Once the document is located click load  to upload document

No Errors Occur click  to complete the process

The members will load

Enrollment Total

Once all census information has been entered, complete the **Enrollment Totals** field.

Note: The Health Coverage and Dental Coverage fields will default based on census enrollment.

- Members can be deleted by clicking the red X

	View Member	Name	Relationship Code	Gender	Date of Birth	Age	Health Coverage Type	Dental Coverage Type	State	Health Plan Selected	Dental Plan Selected	
	1	View	Steven test	Employee	M	06/29/1982	38	EO	EO	TX	MTBCP027	DTNHR32
	2	View	Gilberto test	Employee	M	03/20/1992	28	EO	EO	TX	MTBCP027	DTNHR32
	3	View	Galvin test	Employee	M	11/07/1974	46	EO	EO	TX	MTBCP027	DTNHR32

Rates

Confirm Rating Model defaults selected.

Account Summary

Account Summary page: Allows users to review the input data by section. The user reviews all data by section to ensure accuracy.

Separate panels with scroll bars display key information from previous pages. Each panel includes a **Change** button, which takes user to the applicable page if edits are required.

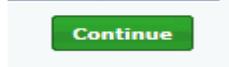
- Account Information
- Additional Information
- Member Census
- Plan Selections
- Rating Model

The screenshot displays the 'Account Summary' page with several sections:

- Account Information:** Includes SIC Code (2033-Mfg canned baby food, soup, and specialties), Policy Effective Date (01/01/2021), Case Submitted to BCBS (10/02/2020), and Blue Access for Employers (BAE) details.
- Employee Retirement Income Security Act (ERISA):** Shows 'ERISA Regulated Group Health Plan: No'.
- Physical Address/Contact Information:** Fields for Contact Name, Contact Title, Phone, and E-Mail Address.
- Additional Information:** Fields for Public Entity (No), Include Retirees (No), and Current Carrier Health (United Healthcare).
- Eligibility:** Waive the waiting period on initial enrollment: Yes. The Eligibility Date for an employee who becomes eligible after the Effective date of the Group's Health Insurance Plan is determined by the 1st day of the month following 90 days of employment.
- Member Census:** A table listing members with columns for ID, Name, Role, Gender, Birth Date, Age, SSN, BO, TX, Plan, and DTNHR32.
- Plan Selections:** A table showing selected plans like BlueChoice - PPO and PPD Dental - BlueCare Dental PPO, with columns for Plan #, Ded In/Out, Coins In/Out, OPI In/Out, Office Visit/Specialist, ER Copy/ER Coins, IP In/Out, OP Surg In/Out, and Preferred Rx.

Continue Button

Click the green **Continue** radio button to move to the **Additional Information** page.



Attached Required Documents

Attach Required Documents

Release for Enrollment

[Previous](#)

Please attach the following documents.

[View / Attach Documents](#)

Documents Needed for Enrollment

- * **Benefit Program Application Form (BPA)** Attached Signature Required
- * **Employer Group Information Form (EGI)** Attached Signature Required
- * **Enrollment Census** Attached
- RFP/Extension Form
- COBRA Application Signature Required
- HMO Disclosure Form (if HMO is selected)
- Medical Loss Ratio Assurance Form
- Medicare Secondary Payer (MSP) Employer Acknowledgement Signature Required
- Package Pricing Form Signature Required
- Prior carrier's renewal letter Signature Required

* - Required

To attach documents, select the **'View/Attach Documents'** button.

Result: A window will populate, allowing the user to search system files to find the appropriate document.

Click the **Browse** radio button; locate the appropriate drive and folder where the documents were saved and select the file to upload.

Select the appropriate document type from the **'Document Name'** drop down. Use the scroll bar to see a listing of all document types.

Document Name

Please Select

- Benefit Program Application Form (BPA)
- Employer Group Information Form (EGI)
- Enrollment Census
- Medicare Secondary Payer (MSP) Employer Acknowledgement
- RFP/Extension Form
- Signed Plans Selection & Rates
- COBRA Application
- HMO Disclosure Form (if HMO is selected)
- Medical Loss Ratio Assurance Form
- Package Pricing Form
- Prior carrier's renewal letter
- Prior carrier's most recent billing
- Other

Select the **'Attach File'** button. The document will show in the **'Existing Attached Documents.'**

As each document is attached, the **'Documents Needed for Enrollment'** list will update to show **'Attached.'**

Attachments

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

File: [Browse...](#) Document Name: [Attach File](#)

File	Date/Time Stamp	Document Name	Description/Name	Status	
BPA.docx	2020-10-05 14:32:00.383	Benefit Program Application Form (BPA)	TX00104	COMPLETED	Delete Document
EGI.docx	2020-10-05 14:32:01.213	Employer Group Information Form (EGI)	TX00104	COMPLETED	Delete Document
HR Required Census-tx.xlsx	2020-10-05 14:32:01.813	Enrollment Census	TX00104	COMPLETED	Delete Document
RATES.docx	2020-10-05 14:32:02.65	Signed Plans Selection & Rates	TX00104	COMPLETED	Delete Document
RFP.docx	2020-10-05 14:32:03.393	RFP/Extension Form	TX00104	COMPLETED	Delete Document

If the wrong document has been attached, click the **'Delete Document'** button to remove it from the list.

The deleted document will then show in the **'Deleted Documents'** section

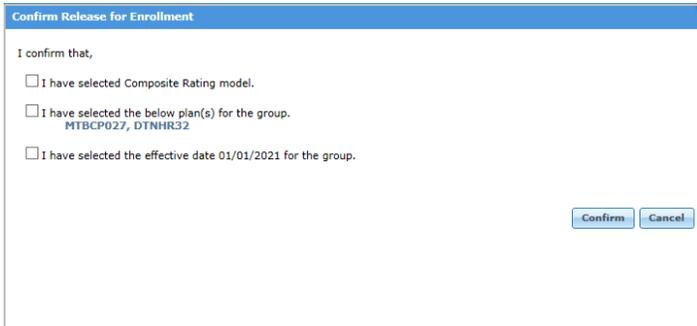
Release for Enrollment

In the **Release for Enrollment** window, check the box in front of the *“I confirm that all uploaded documents requiring a signature have been signed”* statement. The **Release** radio button will become active. Click the **Release** radio button.

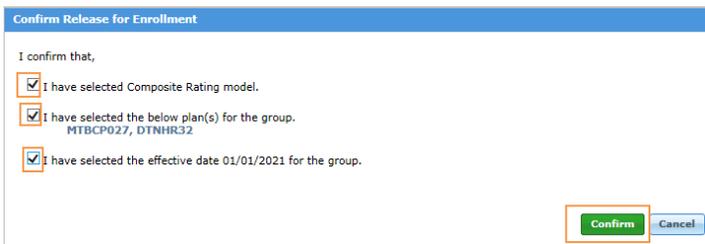


Note: The **‘Release’** button will remain grayed out until all required documents are attached.

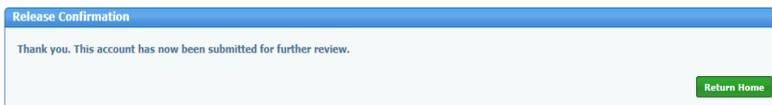
Once the release button has been completed, the **Confirm Release for Enrollment** window opens.



Confirm each selection by checking the box next to the item. Once all items have been checked, the **Confirm** radio button changes to green and user may then click the **Confirm** radio button to release the group to underwriting for review and approval.



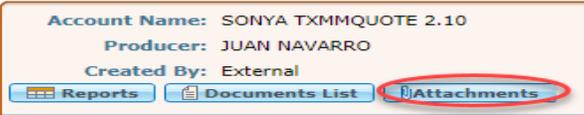
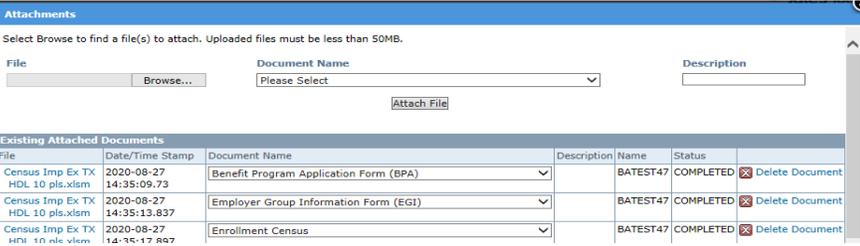
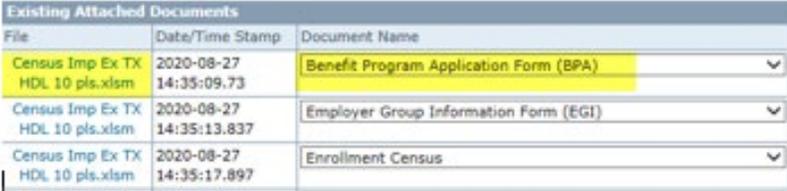
Once the group is released, a message window will populate saying *“Thank you! Your account has been submitted for review.”*



Enrollment is complete and the account is in the **Data Entry Review Activity**. Once the case has been verified, the case will be pushed to Underwriting Release.

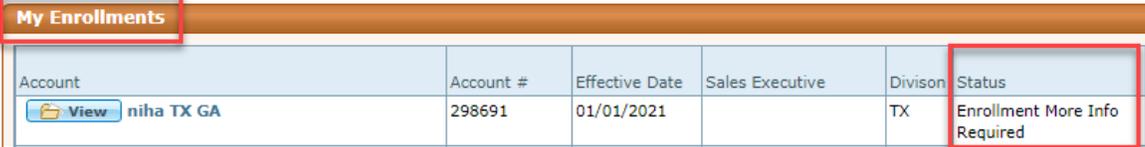
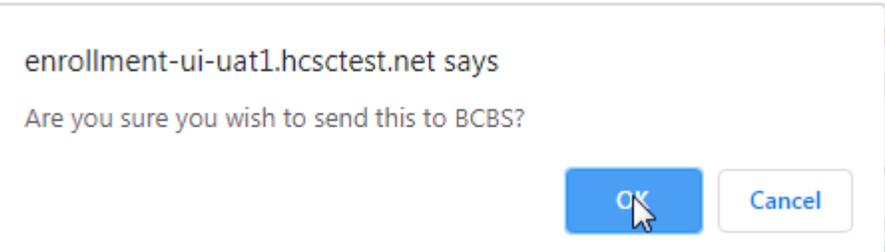
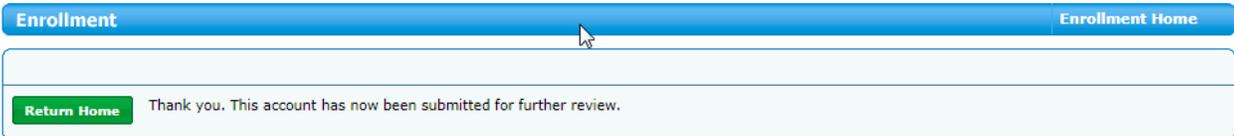
Viewing Paperwork Attachments

Follow the below steps to view the attached paperwork.

Step	Action
<p>Attachments</p>	<p>Enrollment window opens to the Account Summary page. In the Account header field, click on the Attachments radio button to view attached paperwork.</p> 
<p>Attachment Window</p>	<p>Result: The Attachments window opens.</p>  <p>Links to the paperwork attachments are found under the File column. The Date/Time Stamp column identifies date and time that paperwork was attached. The Document Name column identifies type of document attached. Not all the attached documents in this window need to be opened for account enrollment processing. Refer to the required documents for list of documents that need to be reviewed during enrollment process.</p> <p><u>Required Documents:</u></p> <ul style="list-style-type: none"> • Benefit Program Application Form (BPA) • Employer Group Information Form (EGI)- <ul style="list-style-type: none"> ○ Note: Attach the MSP for the EGI • Enrollment Census
<p>Open Attached Documents</p>	<p>To open an attached document, click on the file link next to the required Document Name.</p>  <p>The window populates asking if you want to open or save this file. Click Open</p> 
	<p>Attached document opens for viewing. Repeat step above to open other needed documents for viewing. Note: Keep all the needed documents open to complete accounts enrollment.</p> <p>With all needed documents, still open, click the upper right-hand X to close the Attachments window</p>

Returning the Case back to BCBS

There are instances when case may be sent back for more information. In that instance, the case will need to be returned to BCBS. Follow the below steps to return the case back to BCBS.

Step	Action
<p>Cases Returned by BCBS</p>	<p>The case returned will appear in “My Enrollments” in the status Enrollment More Info Required</p>  <p>View the case and access the log</p> <p>Case ID: 285730</p>  <p>A copy of the notes and reason codes will be added to the Log for your review. You can attach a separate document to provide additional clarification as needed.</p>
<p>Ready to Return to BCBS</p>	<p>Once the additional information has been fulfilled and the case is ready to return to BCBS. Select the Send to BCBS button on the Enrollment Home Page</p> 
<p>Message</p>	<p>A message window will populate saying <i>“Are you sure you wish to send to BCBS?”</i></p> <p>Click OK</p> 
<p>Case Returned</p>	<p>Once the group is released, a message window will populate saying <i>“Thank you! Your account has been submitted for further review.”</i></p>  <p>The case has been returned to BCBS</p>

Tracking and Managing Enrollment

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

Step	Action																																																																	
<p>Recently Accessed</p> <p>My Enrollments</p>	<p>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.</p>  <p>Once the group is selected, click History.</p>																																																																	
<p>Activity History</p>	<p>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.</p>  <table border="1" data-bbox="305 915 1052 1056"> <thead> <tr> <th>Activity Date</th> <th>Activity</th> <th>Status</th> <th>Duration</th> </tr> </thead> <tbody> <tr> <td>10/22/2020</td> <td>Enrollment More Info Required</td> <td></td> <td>103 Day(s)</td> </tr> <tr> <td>10/22/2020</td> <td>Underwriter Review</td> <td>Completed</td> <td>0 Day(s)</td> </tr> <tr> <td>10/22/2020</td> <td>Enrollment Data Entry</td> <td>Completed</td> <td>0 Day(s)</td> </tr> <tr> <td>10/22/2020</td> <td>Start</td> <td>Completed</td> <td>0 Day(s)</td> </tr> </tbody> </table> <table border="1" data-bbox="305 1056 1052 1864"> <thead> <tr> <th>Activity</th> <th>Status</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Enrollment Data Entry</td> <td>Pre-enrollment</td> <td>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. 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**Enrollment
Status for In
Process
Enrollments**

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. You can also attach a separate document to provide additional clarification to the underwriter as needed.