

Employer Enrollment Tool Maintenance guide for brokers

Last updated January 20, 2024

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Welcome to
your new
tool....

At Blue Shield of California,
we're dedicated to improving
the Commercial Market
experience for our customers.

Which is why we are happy to
deliver the expanded digital
capabilities of maintenance to
the Employer Enroll Tool for
Small Group and Core lines of
business.

Make enrollment changes with confidence with the Employer Enrollment Tool



Real-time installation

Provider and other downstream systems will update in their normal SLA



Visibility to your data

Group and member account pages make it easy to view information



Smart capabilities

Field level validations help you avoid typos and simple mistakes



Simple submissions

Guided workflows direct you through each step of the process

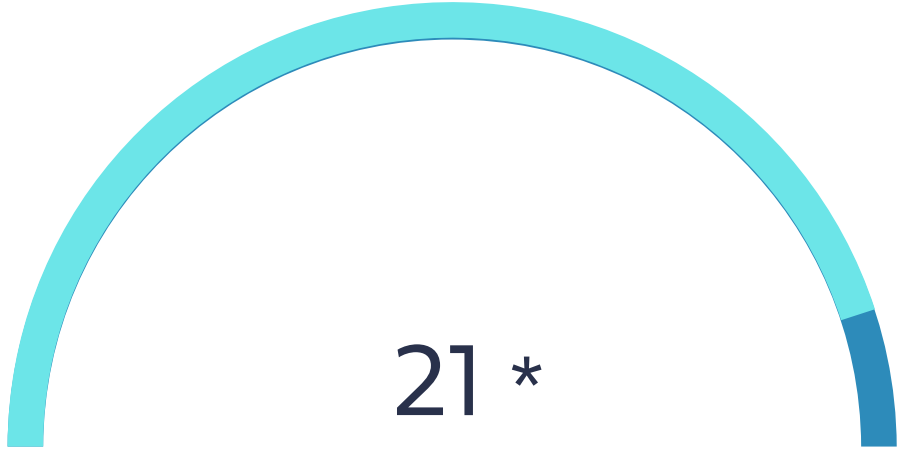
Experience easy enrollments yourself

Expected installation of
new hire enrollment



minutes

Features available in
one tool



21 *

Tool submissions with
self-service status
tracking



100%

Tool tips

1

Views default to your recently viewed information. Use the filters My Account when first accessing company accounts

2

Use the search bar or Manage all Groups action button to access a group record

3

Access to edit group and member information is determined by profile roles set on the portal

4

Use Google Chrome or Microsoft Edge browsers

5

Enter required fields indicated by a red asterisk

6

Enter the name of the person processing the submission for the digital signature

7

Click View all on the To-Do list to see the full list of open tasks

8

Group reinstatement will remain outside of the tool. Please contact Broker and Employer Services to process group reinstatements

Enrollment tips

1

Open enrollment

Make all of your open enrollment changes in the tool

2

Off-anniversary change and exceptions

You can also process changes outside of open enrollment

3

Special Enrollment Period (SEP)

Identify the qualifying/ life event in the tool and the tool will offer SEP updates

4

Waivers & refusals

Existing Blue Shield groups do not need to include members refusing coverage

Eligibility tips

1

Waiting periods

The tool will automatically implement the selected waiting periods

2

Member level benefits

Responsive fields will reflect the benefit rules in place

3

Federal COBRA

Enroll and view Federal COBRA members

4

Part-time & full-time coverage

Enroll and manage coverage for both levels of employees

Features



Group

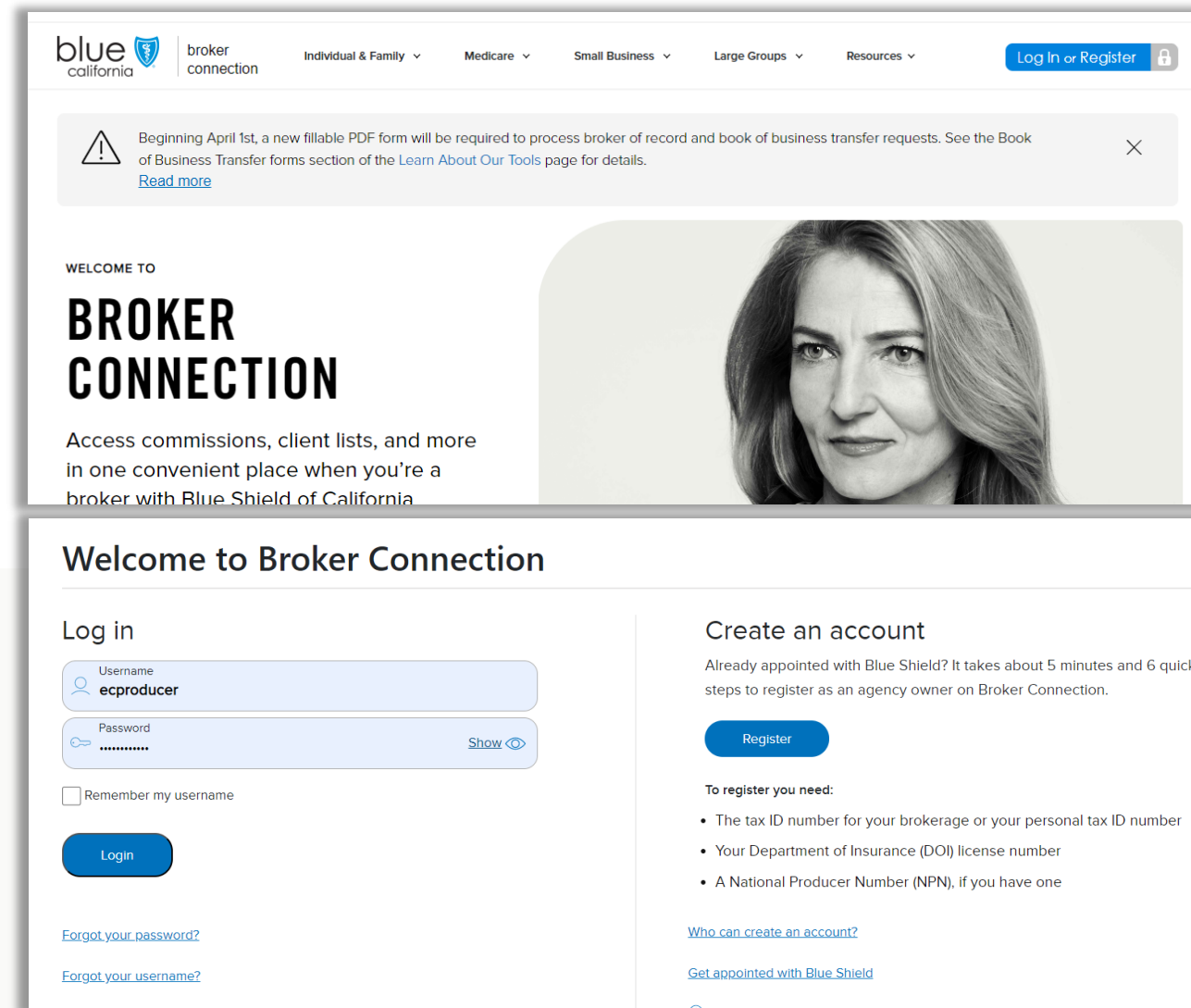
- Cancel a group
- Enroll employees
- Edit group address and contact information
- Edit group contribution amounts
- Edit group contacts
- Edit bill format
- Edit group name
- Edit group entity information
- Add a group class
- Add a plan or product
- Cancel a plan or product
- Bulk member cancelation



Member

- Cancel a subscriber
- Cancel dependents
- Order ID cards
- Download ID cards
- Edit subscriber and dependent demographics
- Edit contact information
- Edit class, subgroup, department code
- Add a plan or product
- Cancel a plan or product
- Add a dependent
- Enroll in COBRA

Navigate to the tool



The screenshot shows the Blue Shield of California Broker Connection website. At the top, there is a navigation bar with the Blue Shield of California logo, the text "broker connection", and several menu items: "Individual & Family", "Medicare", "Small Business", "Large Groups", and "Resources". A "Log In or Register" button is located in the top right corner. Below the navigation bar, there is a notification banner with a warning icon and text: "Beginning April 1st, a new fillable PDF form will be required to process broker of record and book of business transfer requests. See the Book of Business Transfer forms section of the [Learn About Our Tools](#) page for details. [Read more](#)".

The main content area features a "WELCOME TO" section with the heading "BROKER CONNECTION" and a sub-heading "Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California." To the right of this text is a portrait of a woman with long blonde hair.

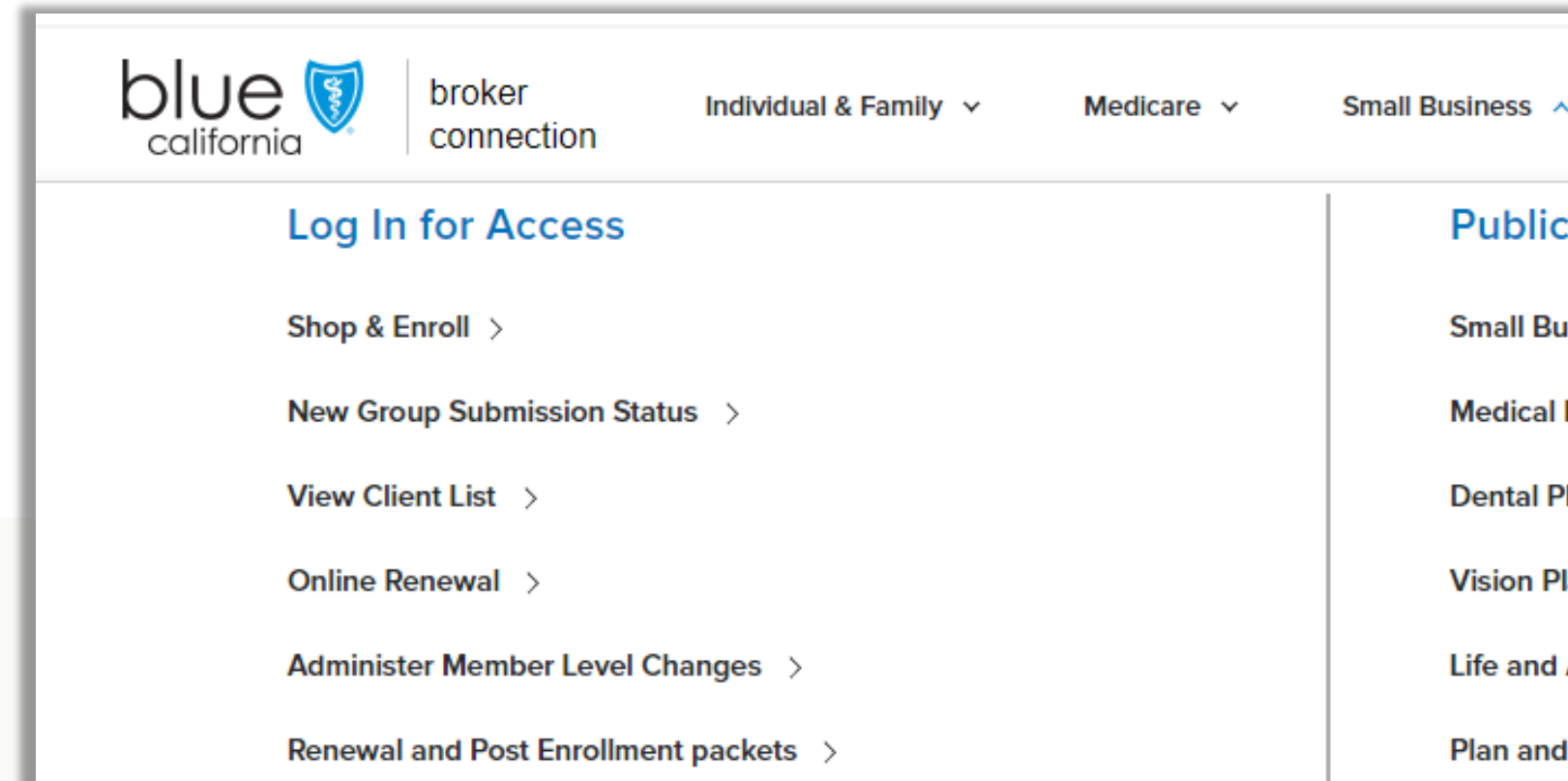
Below the welcome message, there is a "Welcome to Broker Connection" section. On the left, under the heading "Log in", there are two input fields: "Username" with the value "ecproducer" and "Password" with a masked password and a "Show" button. Below these fields is a checkbox for "Remember my username" and a "Login" button. At the bottom of the login section are two links: "Forgot your password?" and "Forgot your username?".

On the right, under the heading "Create an account", there is a "Register" button. Below the button, there is text: "Already appointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner on Broker Connection." Below this text is a list of requirements: "To register you need:" followed by three bullet points: "The tax ID number for your brokerage or your personal tax ID number", "Your Department of Insurance (DOI) license number", and "A National Producer Number (NPN), if you have one". At the bottom of the registration section are two links: "Who can create an account?" and "Get appointed with Blue Shield".

Step 1. Log into Broker Connection

Use the links on the log in page to reset your password

Navigate to the tool



Step 2. Click on the
administer member level
changes link

The link will route you to the
Employer Enrollment Tool

Homepage

Along the top:

- Search bar allows the user to search records they have permission to view, including quotes and enrollments.
- Home returns the user to the Employer Enrollment Tool home page.
- My Groups displays the company account.
- Resources links the broker to User Guide, Tips and Tricks, and a tool resource page with additional information.

Quick Actions:

- Manage all groups displays the groups owned by the logged in user and the agency book of business. To submit a group or member record change from the home or landing page, click on the button Manage All Groups.

blue
california

Search...

House Broker

HOME MY GROUPS MY REPORTS RESOURCES

New here? Get to know group-level and member-level benefits management on the Employer Enrollment Tool. [Register](#) for a training session or access a tool [quick guide](#).

Welcome House Broker!

New Enrollment View Small Group Enrollments Quote a Small Group View Small Group Quotes Manage All Groups

Enrollment Progress

Not yet started	In Progress, not submitted	Submitted, requires broker action
9/1/2023 Effective: 1 10/1/2023 Effective: 2 1/1/2024 Effective: 11	9/1/2023 Effective: 7 10/1/2023 Effective: 5 1/1/2024 Effective: 10	9/1/2023 Effective: 1

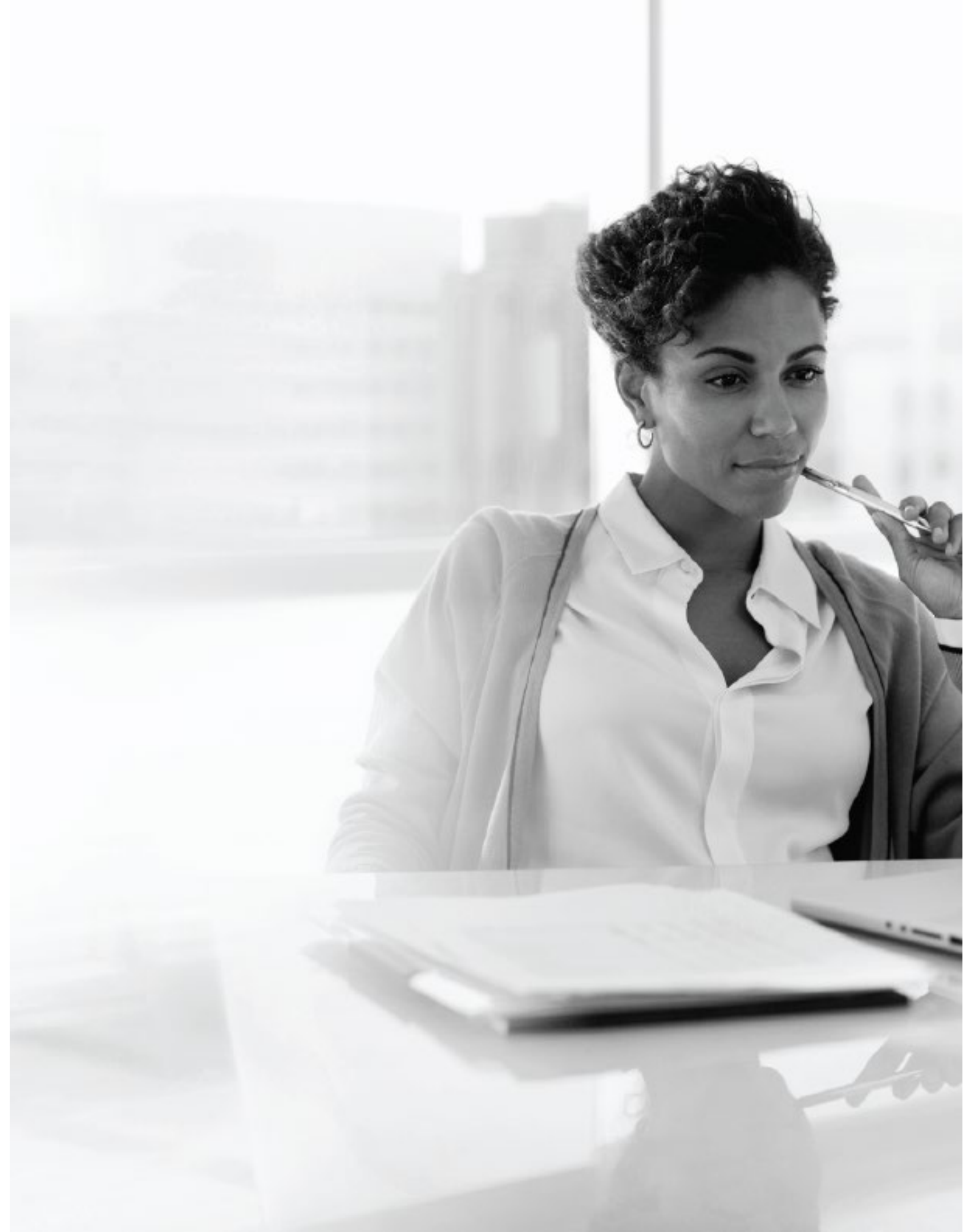
Submitted Pending UW Approved BSC Finalizing Enrolled

To Do

- SGRPJULTESTGRP92: Maintenance Documents Required
- SGRPJULTESTGRP92: Maintenance Documents Required
- SGRPJULTESTGRP92: Maintenance Documents Required
- SGJULLOCALACCESSPLS02: Maintenance Documents Required

Group level changes

Remember group features are
available by line of business



Group account

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

The account record page displays information regarding to your company.

This is the launch point for all group and member transactions.

The screen is split it up into different sections and tabs to organize the group's information. Click through the tabs and sections to view the current information on file.

Group account continued

Enroll Employee button opens an enrollment application flow that will guide the user through the enrollment process.

Edit Group button opens a screen of cards each a different type of record change. Click on a card to include it in the transaction. Click on multiple cards at one time to submit many different record change types in one transaction.

The screenshot shows the Blue California Group Account Management interface. At the top left is the Blue California logo. A search bar is located at the top right. Below the logo is a navigation menu with links for HOME, MY GROUPS, MY REPORTS, and RESOURCES. On the right side of the page, there are three buttons: Cancel Group, Enroll Employee, and Edit Group. Below these buttons is a section for the account named CLEAR CONSTRUCTION, with a + Follow button. A table displays account details:

Group ID	Status	Business Unit	No of Employees	Cancel Date	Account Payment Status
W0105243	Enrolled	ISGBU	7	12/31/2999	Current

Below the table is a navigation menu with links for EMPLOYER INFORMATION, MEMBER ROSTER, ENROLLMENT CONTRACTS, QUOTES COMPLETED, QUOTES IN PROGRESS, EMPLOYER CONTACTS, PLANS, PAYMENT, and MORE. The EMPLOYER INFORMATION section is expanded, showing three cards:

- Account Information**

Account Name	Tax ID	Effective Date	Doing Business As Name	SIC Code
CLEAR CONSTRUCTION	823613035	2019-04-01		1521
- Address Information**
 - > Principal Address
 - > Billing Address
- Waiting Period**

Class Code	Class	Waiting Period	Effective Date
1000	ACTIVE CA ELIGIBLES		2023-04-01

Group level maintenance scope

There is different functionality between Core and Small Group. Core groups will have the ability to enroll members, change the demographic details, and change group contacts. Small Groups will have more cards including changes to class offerings, plan selections, and employer contribution amounts.



- Enroll Employees
- Group details
- Group contacts
- Group plans
- Class plans
- Group name and structure changes
- Contribution amounts
- Eligibility offerings
- Billing format
- Cancel group
- Bulk cancel members



- Enroll Employees
- Group details
- Group contacts
- Cancel group
- Bulk cancel members

Enroll employees

Use for - Enrolling new employees and their dependents

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

Enroll a member

Enter the subscriber application information into the fields.

Required fields must be completed before moving forward.

▼ Qualifying Event Details

Qualifying Event* ▼ Qualifying Event Date* 📅

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

Full-Time Part-Time

Effective Date 📅

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

> Demographics
Please expand to fix all invalid fields.

> Subscriber Details
Please expand to fix all invalid fields.

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

Enroll employees continued

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


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

Plan selections

Make the member plan selections

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

Plans for current year enrollment @

 employee name

Next

Previous

Cancel


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

Plans for current year enrollment @

First Name employee Last Name name

Medical

Accept Decline

 Please select at least one plan to continue.

Save

Group cancellation

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


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


Cancel Group

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

Are you sure you want to cancel this group? *

Yes No

Cancellation Date* 

Reason code* 

Next

Bulk member cancelation

Use for – canceling multiple members in one submission.

How option 1 – Enter termination directly in the tool by checking the box next to the members from the group roster and entering the cancelation information. Use the search to quickly find members to select.

The screenshot displays the 'Enter Terminations' interface. At the top, there are two input fields: 'Enter Terminations' and 'Upload File'. Below these are three filters: 'Termination Date' (with a calendar icon), 'Benefit end date' (with a calendar icon), and 'Cancel Reason' (a dropdown menu showing 'Select an Option'). A blue button labeled 'Apply to all Selected Employees' is positioned below the filters. The main section contains search fields for 'Member Name' and 'Member ID', each with a magnifying glass icon. Below the search fields is a table with columns for 'Member Name', 'Member ID', 'Termination Date', 'Benefit End Date', and 'Cancel Reason'. Each row in the table has a checkbox on the left for selection. The table lists three members: CHRISTOPHER BARTER (ID: 908855741), ZBIGNIEW CYGANIK (ID: 908855575), and GARY K SLOANE (ID: 911403739). Each member's 'Termination Date' and 'Benefit End Date' fields are empty with calendar icons, and their 'Cancel Reason' is set to 'Select an Option'.

<input type="checkbox"/>	Member Name	Member ID	Termination Date	Benefit End Date	Cancel Reason
<input type="checkbox"/>	CHRISTOPHER BARTER	908855741			Select an Option
<input type="checkbox"/>	ZBIGNIEW CYGANIK	908855575			Select an Option
<input type="checkbox"/>	GARY K SLOANE	911403739			Select an Option

Bulk member cancellation continued

Use for – canceling multiple members in one submission.

How option 2- Download the Excel template to enter the member cancellation information and upload into the tool. Files need to be saved as a CSV format before uploading.

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

Enter the cancellation information on the screen or upload a file using the provided template.

[Download template](#)

Class offerings

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

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

Class Offerings

Make changes to the enrollment classes offered by the group

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


Classes cannot be offered cannot be re-selected.


The group currently offers the classes listed in the table

ACTIVE CA ELIGIBLES

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

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

 Please select atleast one class from the above list

Effective Date
04-01-2023 

Group contacts

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

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

The screenshot displays a web interface for managing group contacts. It is divided into two main sections: 'Update Primary Contact' and 'Update Secondary Contacts'. Each section contains a form with input fields for Name, Phone, and Email, and a 'Cancel Date' field with a calendar icon. A blue 'Add Contact' button is positioned between the two sections. The 'Cancel Date' field is currently set to February 1, 2024.

Update Primary Contact

Existing Primary Contact

Name* Lisa Courtemanche Phone* (555) 123-4555 Email* lcourtemanche@dtwc.com.invalid Cancel Date 2024

Add Contact

Update Secondary Contacts

Existing Secondary Contacts

Contact Name* Stephanie Kenyon Phone Number* (619) 525-2663 Email* no_one@email.com.invalid

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

Group plan changes

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

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

Group plan modifications

Specify the type of group plan change


Check the box to identify the type of plan change and provide the effective date. Click on the product cards to identify the product being modified. Multiple product cards can be selected at a time.

Products and plans not being modified do not need to be selected.


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

Cancel a product or cancel plans within your existing product


Select the cancel date for cancelling products and/or plans

Please select the last day of the requested month for cancellation*
01/31/2024 


Select Coverage Options




Medical



Dental



Vision



Life

Group plan changes continued

Add a plan or product

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

Select Medical Coverage

Make the group plan selections

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

Current Plans

Gold Full PPO 500/30 OffEx

Bronze Full PPO 7500/65 OffEx

Select Plan Package

Off-Exchange

Mirror

Network

Trio ACO HMO

Access+ HMO

Local Access+ HMO

Tandem PPO

Full PPO

Group plan changes continued

Cancel a plan or product

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

Select Medical Coverage

Make the group plan selections

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

Current Plan

- Gold Trio HD0 100/50 OEBx
- Gold Trio HD0 500/25 OEBx
- Platinum Trio PPO 00 OEBx
- Platinum Trio PPO 400 OEBx

Canceled Plan

- Gold Trio HD0 100/50 OEBx

Select Plan Package

Cancel Package Move

Network

- Trio HD0
- Trio PPO
- Access HD0
- Full PPO
- Local Access HD0

Cancel All **Reaffirm All**

Trio HD0

- Silver Trio HD0 2100/61 OEBx
- Bronze Trio HD0 1000/10 OEBx

Trio PPO

- Platinum Trio PPO 100/50 OEBx
- Gold Trio PPO Savings 1750/11% HD0 Over500 OEBx
- Silver Trio PPO 2100/61 OEBx
- Bronze Trio PPO 1000/61 OEBx
- Bronze Trio PPO 600/10 OEBx

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

Group details

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

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


Group details

Make changes to the group demographic information


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

Required fields must be completed before moving forward.

Update Principal Business Address

 525 GARDEN STREET SANTA BARBARA CA

Update Billing Address(es)

 CLEAR CONSTRUCTION 525 GARDEN STREET SANTA BARBARA

Next

Previous

Cancel

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

Employer contributions

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

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

Employer contribution
Make changes to the contribution amounts

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

Employer Contributions

Choose the details you would like to modify

Life

Subscriber Contribution

\$ % Enter a number* 66

Dependent Contribution

\$ % Enter a number* 66

Structure change

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

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

Update Business Name

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

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

New Doing business as (DBA)


New Standard Industry Classification (SIC) and Industry description

New Legal Entity Type

▼ Select the type of change(s) requested:

Simple Name Change

Comprehensive Business Change

 Please select the type of change(s) requested

Structure change - complex

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

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

Update Business Name

Select all that apply ·

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

Enter the total number of current Full Time and Full Time Equivalent employees

How many employed in prior calendar quarter?

How many employed in prior calendar year?

Enter the total number of current Full Time and Full Time Equivalent employed out of state

state

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

quarter

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

Structure change - simple

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

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

Update Business Name

▼ Simple Name Change

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

Filed fictitious business name (FBN) for new fictitious business Doing Business As (DBA)

Filed amendment/conversion for corporations/partnerships

Next

Previous

Cancel

Billing attribute

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

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

Modify Billing Information

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

Premium Statement Print Id

CLEAR CONSTRUCTION Standard Bill Sort by Department Code ×

Save

Next

Previous

Cancel



Member level changes

Member maintenance

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

The screenshot displays the Blue Shield of California member maintenance interface. At the top, the logo "blue of california" is visible, along with a search bar containing "sgaprtestgr" and a user profile for "Test House Broker". The navigation menu includes "HOME", "MY GROUPS", "MY REPORTS", and "RESOURCES". Below the navigation, there are buttons for "Cancel Group", "Enroll Employee", and "Edit Group". The main content area shows account details for "Account SGAPRTESTGRP68" with a "Follow" button. A table of account information is displayed with columns: Group ID (W2125231), Status (Approved), Business Unit (ISGBU), No of Employees (5), Cancel Date (12/31/2999), and Account Payment Status. Below this, a tabbed interface shows "MEMBER ROSTER" selected. A message states "Roster is limited to 100 rows. Use search and filter options to quickly find members. Download the roster to view all subscriber and dependent information." with a "Download as CSV" button. The roster table has columns: Member Name, Member Id, Birth Date, Status, Effective Date, Benefit Begin Date, and Benefit End Date. The data rows are:

Member Name	Member Id	Birth Date	Status	Effective Date	Benefit Begin Date	Benefit End Date
1 VAHRADIAN STEPHANIE1	912149303	01/01/1978	Active	04/01/2023	04/01/2023	
2 HERAS SOTO TODD	912149299	01/01/1978	Active	04/01/2023	04/01/2023	
3 JARIEL JEFFREY	912149300	01/01/1978	Active	04/01/2023	04/01/2023	
4 OSSER BEVERLY	912149301	01/01/1978	Canceled	04/01/2023	04/01/2023	04/30/2023
5 MICHAELA JONES	912149302	01/02/1978	Canceled	04/01/2023	04/01/2023	04/30/2023
6 MARIAN SABOO	912149539	04/08/1988	Pending	04/12/2023	06/01/2023	

At the bottom, there is a footer with links for "Privacy Policy", "Report Fraud & Abuse", "Legal Disclaimers", "Contact", "Nondiscrimination notice", "Language assistance", and "Cobrowse".

Member account

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

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

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

Subscriber Id	Group	Status
909338975	CLEAR CONSTRUCTION	Active

Subscriber Information

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

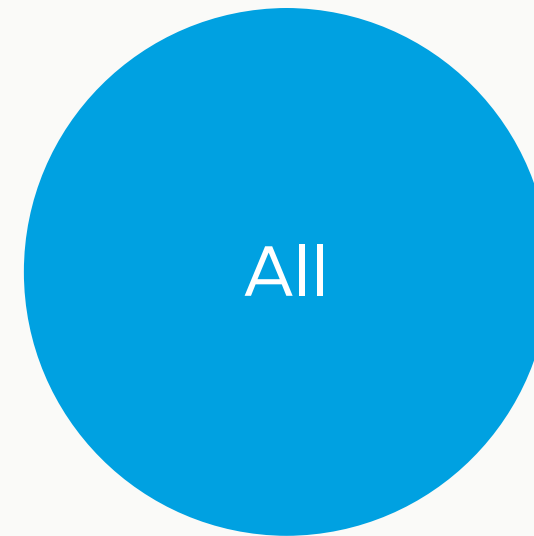
Address Information

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

Contact Information

Member level maintenance scope

Both Core and Small Group have the full suite of member maintenance functionality. Additionally, the Employer Enrollment Tool includes all prior Benefits Management Tool functionality.



- Cancel member
- Reinstate member
- Order ID card
- Download ID card
- Member demographics
- Member contact
- Member plans
- Add dependent(s)
- COBRA enrollments
- Dependent cancelation /reinstatement

Member cancelation

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

How - Click on the cancel member button on the member account page. Provide the cancelation reason and date.

If your company offers CalCOBRA coverage you will see an additional field. Indicate if this member will elect the CalCOBRA coverage and we will send out the CalCOBRA packets for enrollment. Companies offering Federal COBRA will not have this additional field.

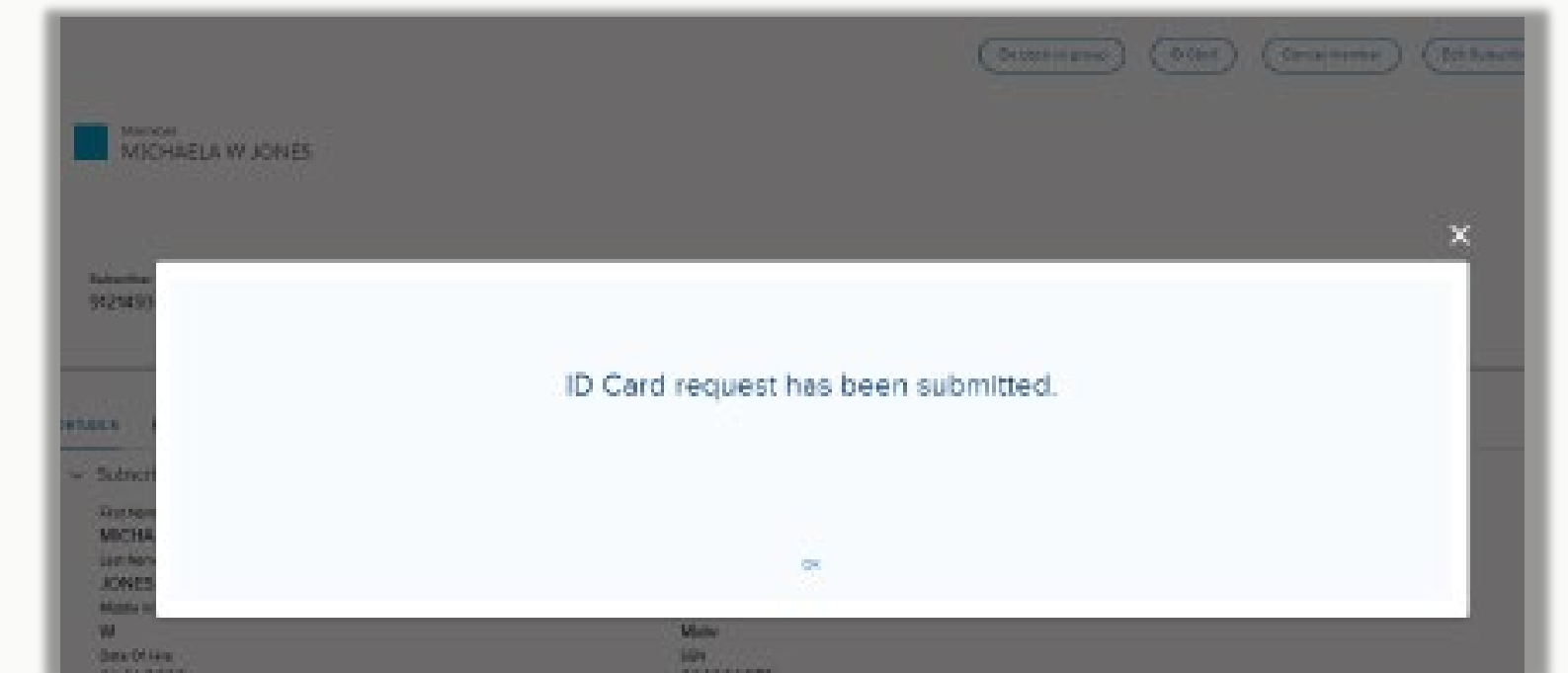
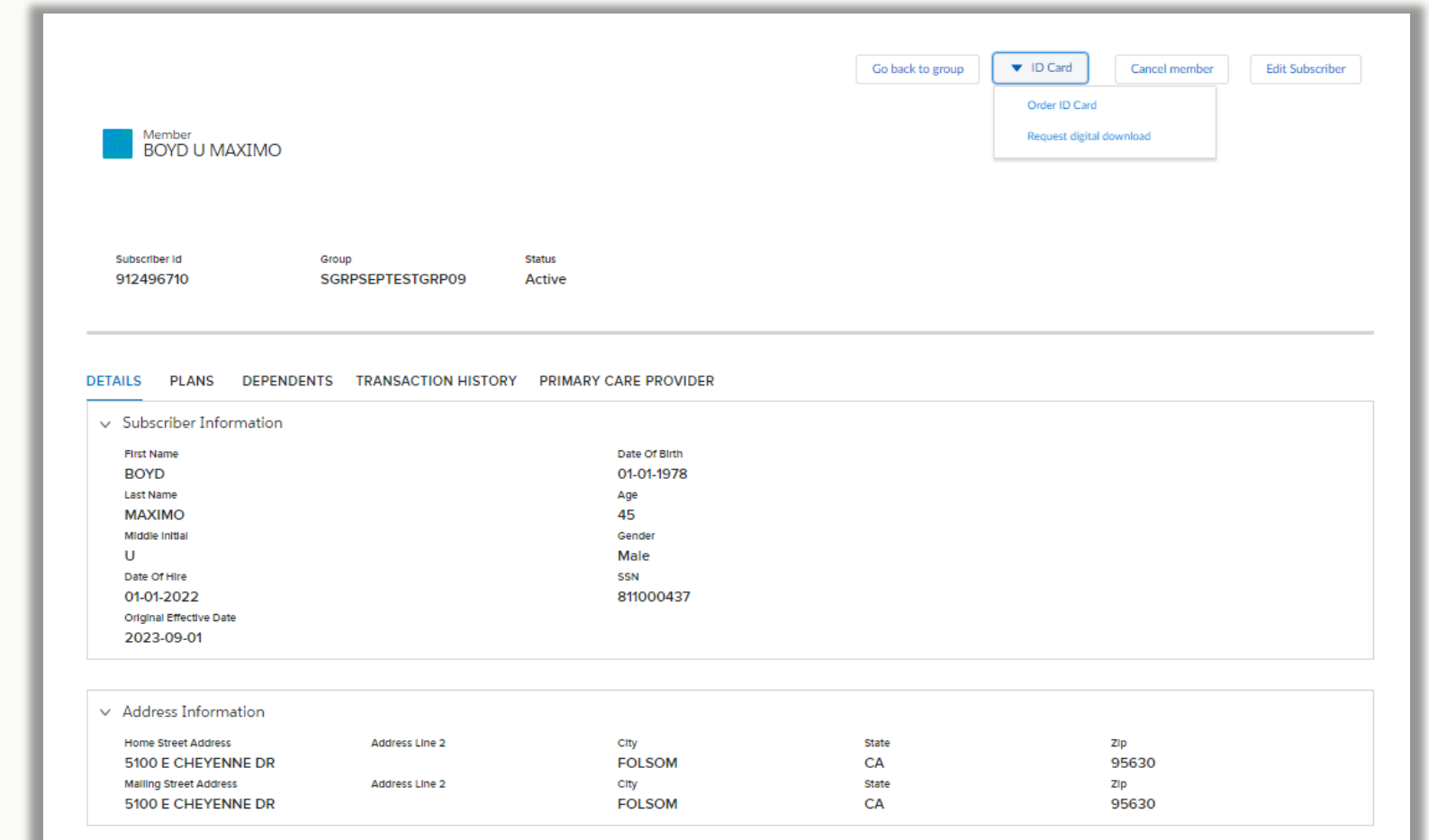
The screenshot shows a web form titled "Cancel member" with a close button (X) in the top right corner. Below the title is a warning message: "Canceling members will remove them from Blue Shield of California healthcare coverage". The form contains several input fields: "Subscriber" (expanded), "Member Name*" (MIGUEL TORRES), "Subscriber ID*" (909338975), "Cancellation Reason*" (dropdown), "Cancellation Date*" (calendar icon), "Benefit End Date" (calendar icon), and "Cal-COBRA Eligible" (radio buttons for Yes and No). At the bottom, there are two buttons: "Next" (blue) and "Cancel" (light blue).

Order ID cards

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

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

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

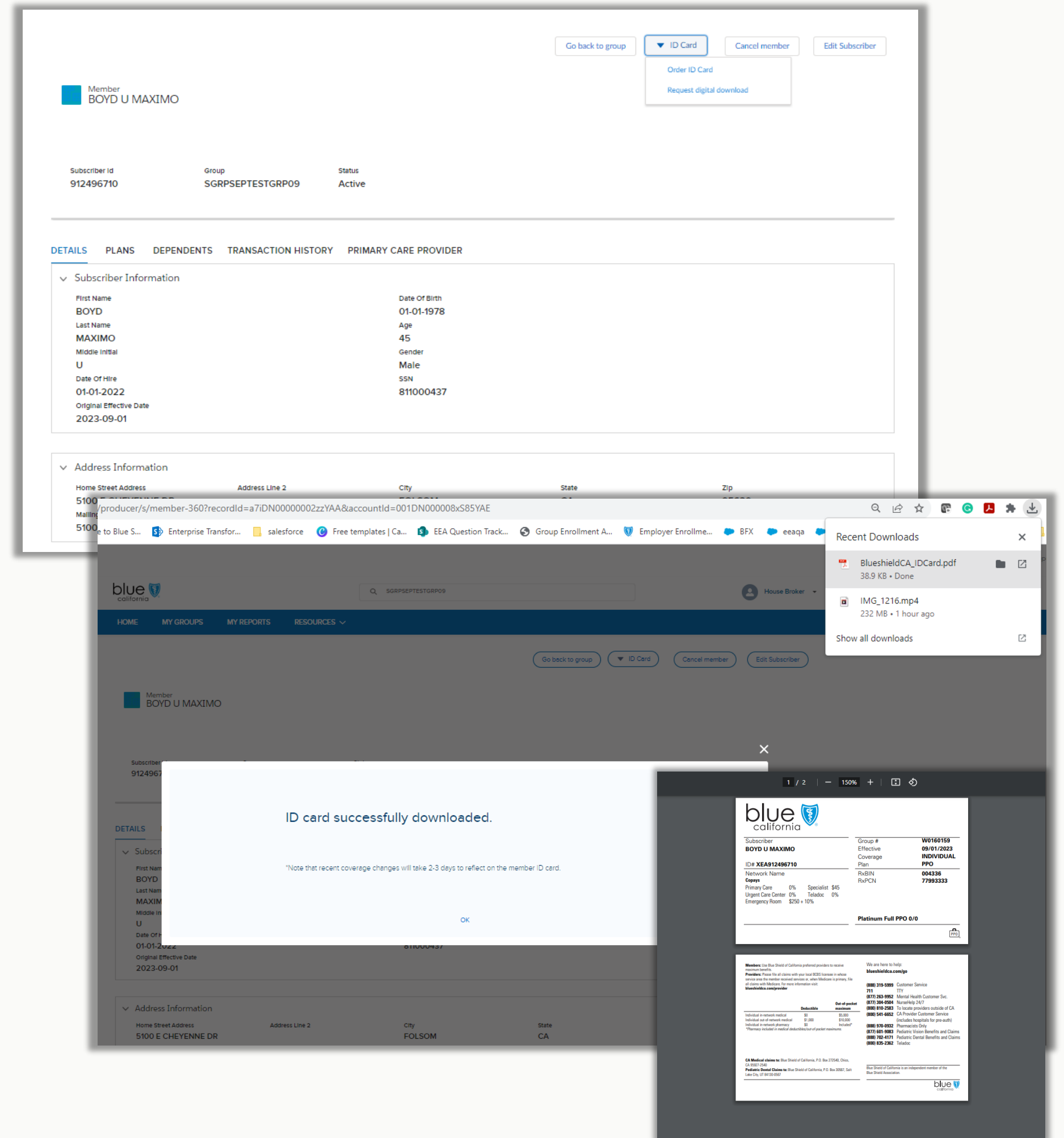


Download ID cards

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

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

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



Member plan changes

Use for – Member plan changes to products and plans.

How - This transaction has a two-screen workflow.

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

Member plan modifications

Specify the type of member plan change

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

Add Products or Change Plans Cancel Product

Qualifying Event* ▼

Qualifying Event Date 📅

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

Next

Previous

Cancel


Member plan changes continued

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

Make the member plan selections

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

Plans for current year enrollment ⓘ

 **employee** name

Next

Previous

Cancel

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


Plans for current year enrollment ⓘ

First Name
employee

Last Name
name

Medical

Accept Decline

 Please select at least one plan to continue.

Save

Add dependents

Use for – enroll dependents to an existing subscriber.

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

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

Add dependent

Enroll dependents to the subscriber

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

Required fields must be completed before moving forward.

Qualifying Event*
Loss of Coverage

Qualifying Event Date
08-29-2023

Effective Date
08-30-2023

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

Dependent Details

Dependent Type*

First Name* Middle Initial Last Name*

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

Gender*

Gender Identity

SSN

Communication Preference Email

Same address as subscriber? Yes No

Same Race and Ethnicity as the subscriber? Yes No

[Add another dependent](#)


Add dependents continued


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



Plan selections


Make the member plan selections

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

Plans for current year enrollment 


 **MIGUEL** TORRES




 **dependent** name 

First Name dependent _____ Last Name name _____ 

Medical

Accept Decline Gold Trio HMO 0/30 OffEx



Member details

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

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

Member details

Make changes to the member demographic information

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

Required fields must be completed before moving forward.

▼ Subscriber

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

Member contact & classification

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

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

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

Member contact and classification

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

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

Required fields must be completed and saved before moving forward.

Subscribers

MIGUEL TORRES ✕

Home (Physical) Address*
304 W ROBERT AVE ✎

City* OXNARD State* CA Zipcode* 93030

Address line 2

Use updated Home address for mailing address

Use updated Home address for all dependents

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

City* OXNARD State* CA Zipcode* 93030

Address line 2

Work Phone
805 793 9407

Home Phone Language Preference*
English ▼

Email

Class* ACTIVE CA ELIGIBLES ▼ Effective Date* 10-01-2019 📅

Sub Group* CLEAR CONSTRUCTION ▼ Effective Date* 10-01-2019 📅

Add/Update Department Code Cancel Department Code

Department Code Effective Date 📅

Save

Next

Previous

Cancel

Federal COBRA enrollment

Use for – Enroll an existing subscriber in COBRA.


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

COBRA enrollment

Enroll the subscriber and any dependents into COBRA

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


▼ Qualifying Event Details

Choose Qualifying Events ▼ Original Qualifying Event Date* 

▼ Classification Selection

Class* ▼ Subgroup* ▼

This field is required. This field is required.

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

Exception reviews

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

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


Exception Review

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


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

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


Reason for submitting this exception request*

 Enter the exception reason before moving to the next screen

Upload Supporting Documents

 Upload Files

Will Upload Later

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

Upload documents for exceptions

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

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

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

Users can upload the requested documents on this screen:

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

Users can check a box to upload documents later:

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



Support

Access tool resources on Broker Connection's [resource page](#)

Additional resources for enrollment and eligibility support:

- [2023 Admin Guide](#)
 - [Employer Connection Quick Start Guide](#)
 - [Employer Connection Reference Library](#)
-

Need to talk to someone?

- [Sales Account contact list](#)
- Small Group Employer Services
(800) 325 - 5166
- Core Group Employer Services
(855) 747 - 5809