Employer Enrollment Tool

General Info FAQ

Question / topic	Answer	Audience
What is the Employer Enrollment Tool (EET)?	The Employer Enrollment Tool is Blue Shield's digital enrollment system for Commercial Markets. We're leveraging our Salesforce platform to automate and streamline how we intake and process enrollment applications.	Brokers Employers
What can I do on the Employer Enrollment Tool?	Currently, the tool supports different functionality for different lines of business. Small Business - quote plans with rates, initial group enrollment, group-level benefits admin changes, member-level benefits admin changes. Core - group-level benefits admin changes, member-level benefits admin changes.	Brokers Employers
Who can use the Employer Enrollment Tool?	Brokers from general agencies or broker agencies appointed with Blue Shield. Active employer customer administrators.	Brokers Employers
Broker access	Access to EET is provided through your Blue Shield Broker Connection portal account. Log in to Broker Connection, click on the navigation bar for Small Business or Core, and select Shop & Enroll or Administer Member Level changes. Both links will automatically route you into the Employer Enrollment Tool.	Brokers
Broker access roles	On Broker Connection, the agency admin can self-manage the roles and access of the users within the agency. Role assignments set on Broker Connection carry over to EET. Broker Connection roles Primary Agent Owner, Primary Agent additional, Sales Agent will have restricted access in EET. Users with these role assignments can view all records in their agency book of business but cannot edit all groups. Broker Connection roles Sub Agent, Support Staff, Admin will have admin access in EET. Users with these role assignments can view and edit all groups in the agency book of business. Admins can also change ownership within the tool to give a restricted user edit a particular group (this is not a BOR change but edit ability within the tool).	Brokers

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Employer admin access	Active employer customers can manage their group's coverage in EET. Access will be provided through Blue Shield's Employer Connection portal. The employer customer primary contact, as indicated on the coverage contract, will need to register on the portal before accessing EET. Once registered, log in to Employer Connection portal and click on the Benefits Management link on the top of the page.	Employers
When did the Employer Enrollment Tool launch?	Small Business quote and initial group enrollment launched June 2020. Small Business and Core benefits management launched April 2023.	Brokers Employers
Broker training for benefits management features	Launch training was held March-June 2023. Watch a recording of the training - https://vimeo.com/817501288	Brokers
Employer training for benefits management features	Launch training was held from March-July 2023. Training content is similar for the different business segments but we do offer recordings for each: Small Business - https://vimeo.com/815760240 Core - https://vimeo.com/817431540	Employers
Broker user guides and tool resources	User guides, video tutorials, training recordings, and more are kept current on the Broker Connection Employer Enrollment Tool resource page.	Brokers
Employer user guides and tool resources	User guides, video tutorials, training recordings, and more are kept current on the Employer Connection portal resource page.	Employers
Where can I get help with the tool?	Resources like user guides and videos are available on the portal resource pages. For additional support with a transaction, you can reach out to your Sales representative or the Blue Shield support teams, below, to triage and resolve your questions. Small Group employer services(800)325-5166 Large Group employer services(855)747-5809 Small Group broker services (800)325-5166 Large Group broker services (844)831-4134	Brokers Employers

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How do I report something broken in the tool?	Please connect with your assigned Sales representative or Blue Shield support team. Small Group employer services(800)325-5166 Large Group employer services(855)747-5809 Small Group broker services (800)325-5166 Large Group broker services (844)831-4134	Brokers Employers
How can I check the status of a submission?	We built the Employer Enrollment Tool with visibility in mind. System-generated emails will trigger after each submission to confirm receipt of the enrollment. We'll also send emails if there are documentation requests and when the submission has completed processing. For benefits management submissions, you can track the status in real-time on the group account Transaction History tab.	Brokers Employers
Can groups who use an electronic file feed (EDI) access and submit enrollments through EET?	Yes, EET is available for groups with electronic file feeds (EDI). The electronic file is the source of truth and must be kept current with any changes made in EET to avoid overwriting information.	Brokers Employers
Will information from PDF enrollment applications or electronic file feeds (EDI) be displayed in EET?	Yes. Enrollments processed through other channels get sent to EET at a regular cadence.	Brokers Employers

Employer Enrollment Tool

Small Business initial group enrollment FAQ

Question / topic	Answer	Audience
What line of business is available for group enrollment?	Small Business.	Brokers
Can I save an enrollment and finish it later?	Yes, click “Save for later” on any screen in the enrollment process to save the information provided so far. To complete the saved enrollment, navigate to “View Small Group Enrollments” on the homepage, find the application in the list, and select “Complete enrollment” in the action column.	
Do I need to provide copies of the applications?	No, but we ask that you keep copied of the enrollment applications for any client requests or audit needs.	
How will I know if the enrollment pends for underwriting?	A screen at the end of the enrollment process will display if we need additional underwriting information. The screen will include the names of the documents requested and a place to upload them to the tool. System generated reminder emails will be sent to the submitter until the documents are provided.	
How will I know the enrollment is complete?	System generated emails will communicate the status of the enrollment application.	
When can I access ID numbers for the enrolled members?	Once the group enrollment is complete we will share member ID numbers. This typically takes 30 minutes to one hour.	
Can other agents in my broker agency view my enrollments?	Once a group is installed it will be available to view in the Employer Enrollment Tool by all users in your agency Tax ID.	
Can other agents in my broker agency complete my saved enrollments?	No. In progress or yet-to-be installed groups and applications will only be visible in your Employer Enrollment Tool account.	

Employer Enrollment Tool

Small Business Quoting FAQ

Question / topic	Answer	Audience
What line of business is available to quote?	Small Business.	Brokers Employers
Who can run a quote?	Brokers and Small Business group administrators.	
Which plan packages and products can I quote?	All plan package options across medical, dental, vision, and life products are available for quoting.	
What information do I need to create a quote?	The Employer Enrollment Tool follows the standard quoting criteria to make it easy to run quotes directly with us or a quoting engine. At a minimum you'll need: - Group name - Desired effective date - # of employees - Zip code of the group - SIC code if quoting life products - Ages of the employees on the quote - Coverage level of the employees	
Can I upload the quote criteria?	You need to enter the initial group information into the tool but you can upload a spreadsheet of the employee information like name, age, coverage level. A spreadsheet template is provided in the quoting process and also matches templates used by other quoting tools.	
What formats will I receive my quote?	You have three options to select your quote information: send an email with an attached Excel file, download an Excel file, or download a PDF.	
Can I re-run a quote?	Each quote is created and saved as a unique document. Instead of editing an existing quote, create a new quote with the new information.	
Can I save a quote and finish it later?	Yes. Click on "Save for later" anywhere in the quote process to save the information entered so far. When you're ready to complete the quote, navigate to the View Small Group Quotes button on the homepage and select the quote from the "In Progress" section.	
Where can I see prior quotes?	Click on View Small Group Quotes on the homepage and select the quote from the "Completed" section.	

Employer Enrollment Tool

Small Business and Core maintenance FAQ

Question / topic	Answer	Audience
Are there different features available for Small Business and Core?	Yes. Small Business and Core have the same member-level maintenance changes available but not the same group-level changes. For Core, the only group-level changes available are Group Details to change the address/phone number and Group Contacts (launch Feb 2024).	Brokers Employers
Are there different levels of access in EET for brokers?	Yes. EET provides two levels of access: restricted access and admin access. **Restricted access gives the user:** - access to view all groups in the book of business - access to edit only groups that they own in EET **Admin access gives the user:** - access to view and edit all groups in the book of business - access to edit groups that they own in EET - access to change user ownership of groups in EET The levels of EET access line up to the following roles on Broker Connection that brokers can self manage. **EET Restricted** = Broker Connection roles Primary Agent Owner, Primary Agent additional, Sales Agent **EET Admin** = Broker Connection roles Sub Agent, Support Staff, Admin	Brokers
Do second writing producers have access to their shared groups?	As of Oct. 2023, a manual sharing was stood up to give second writing producers access to the groups where they are listed as the secondary producer. In 2024, the team will deploy a permanent solution to give automatic access to all brokers on the group's contract.	Brokers
Does EET also manage billing and invoices?	Billing and enrollment are two separate tools. all users can still access the Billing Center tool in Employer Connection.	Brokers Employers
What types of actions are not possible in EET?	- Enrolling court ordered dependents - Future effective transactions unless it is loss of coverage - Reinstating a group - Changing the Broker of Record - Adding a new subgroup to an existing group - Bill payment	

	- Managing user access or permission roles	
Where can I get information on the qualifying events used in the tool?	EET follows the same eligibility guidelines and rules as all other enrollment channels including qualifying events. Refer to the Administrator Guides for SG and Core for qualifying event definitions, usage, and limitations.	Brokers Employers
Can groups using EDI or electronic file feeds use EET?	Yes. They can view their roster and order ID cards like before AND have ~dozen types of benefit admin changes they can make in the tool. The EDI file is the source of truth and must be reconciled with the changes submitted via EET. When an EDI submits a change in the tool they must check a box acknowledging that they will also update their file. Users cannot move forward without checking the box.	
Why is Open Enrollment not available as a qualifying event?	Open Enrollment qualifying event is displayed in the tool using logic and will only display during the Open Enrollment window - up to 120 days before the group's anniversary date and 5 days after. Check the anniversary date to see if this is why it is not available. EDI groups will not have an Open Enrollment qualifying event. To avoid missing or overwritten data, we ask that groups send OE changes via EDI and not EET. If the group needs an exception to this, submit a CID to remove the EDI markers on the subgroup. You will need to request them to be added back after the tool changes are complete.	
Can I enter a future qualifying event date?	The tool currently only allows future dated loss of coverage submissions. All other QEs need to be today's date or in the past.	
Can I filter or restrict access to a subgroup like in Employer Connection?	No. You can filter the member roster by subgroup, but you will still have access to all of the members in the group. The team has an enhancement on the roadmap to align the subgroup restrictions.	
Do I need to enroll members refusing or waiving coverage?	No. Only enroll the people taking BSC coverage.	
Are job title and job classification required for employee enrollments?	Yes. These are needed for Life plan enrollment. If the user does not have job classification they can enter the job title into both fields.	

Small Business and Core maintenance FAQ

What information should be entered into PCP / PCD fields for member enrollment?	PCP and PCD ID numbers should be used.	
Why is the class dropdown blank?	Class is driven by logic on the member's address. If the class dropdown is blank on the enrollment or contact flows, check the member's address. - if the address is in state and the dropdown is blank, erase the address and reenter it using the Google address search result - if the address is out of state, the group needs to have an out of state class setup first.	Brokers
Why does the tool ask for current and renewal plan selections?	This is a "new" approach to member enrollments done during a group's Open Enrollment window. In prior tools, when a member was enrolled during Open Enrollment and the presumptive renewal was already generated in Facets the enrolling member would not get added to the renewal. This lead to new members getting canceled on the anniversary date. To avoid this issue, EET will ask for both plans at the time of enrollment so the member can enroll for coverage now and have coverage after the anniversary date.	Employers
What do I do if plans are not available to select during enrollment or plan change transactions?	Do not complete the enrollment or plan change. Instead cancel out of the submission and notify your Blue Shield representative that no plans were available to select so we can resolve the issue.	
What happens if I submit an enrollment or plan change without the plans?	The submission will get stuck in a pending status because we cannot complete the enrollment without the plan information. An automated email will be sent to the submitter to re-do the enrollment or plan change.	
Where do I provide documents for underwriting?	Submissions that pend will sometimes require documentation for underwriting to approve/decline the change. You need to upload the requested documents thru the tool and have two places to do this. 1. The tool will let the user know the submission requires review and if & what documents we need. The user can upload the documents to this page if available. 2. If the user does not have the requested documents to provide during the submission, they can check the “will upload later box" and complete the submission. When they have the documents to	

	upload, they will have a task under the To Do List on the homepage with the group's name and a hyperlink to "upload maintenance documents". The user needs to click on the link and then click on the "upload documents" button in the right hand side of the page that opened. A window will open for the user to upload the documents."	
Can I enroll members into CalCOBRA in EET?	No. BSC does not administer CalCOBRA coverage. However, the tool will ask CalCOBRA eligible groups if a canceling member is eligible for CalCOBRA as the "digital version" of the CalCOBRA notification form. If yes, the system will notify the CalCOBRA team to send the enrollment packet to this member.	Brokers Employers
Why is the member roster filter not displaying the search criteria?	The roster search is not filtering for the first member but subsequent searches work. Clear out the search criteria and try again.	
Duplicate members are listed on the member roster, one is active, and one is pending, how do I remove the pending member?	Duplicate members show up in EET when applications are submitted in the tool and over paper/PDF. One of the applications will not fully install so we don't have duplicate members. To remove the pending application, reach out to your Blue Shield representative to have the duplicate removed.	
Why are members canceled never effective showing on the member roster?	Members canceled never effective will not update in real time. This type of cancelation will process every Tuesday and Friday.	
Why does the member's class ID did not match the class ID I have on record?	Members with future effective dates might display a different subgroup or class ID. This information gets updated on the member's effective date.	
Why can't I enroll a part-time employee?	Part-time coverage needs to be offered at the group level before part-time members can enroll. Members also need to meet the hourly thresholds to qualify for part-time employment coverage. Learn more in the Admin guide.	