BlueCross BlueShield of Texas

ACA Small Group Enrollment Job Aid

For Producers and General Agents

Document Purpose

This job aid provides a quick overview of the eSales ACA Small Group Enrollment tool enhancements. These enhancements are effective as of July 8, 2016.

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Other Reference Materials

Below is a listing of other relevant reference materials:

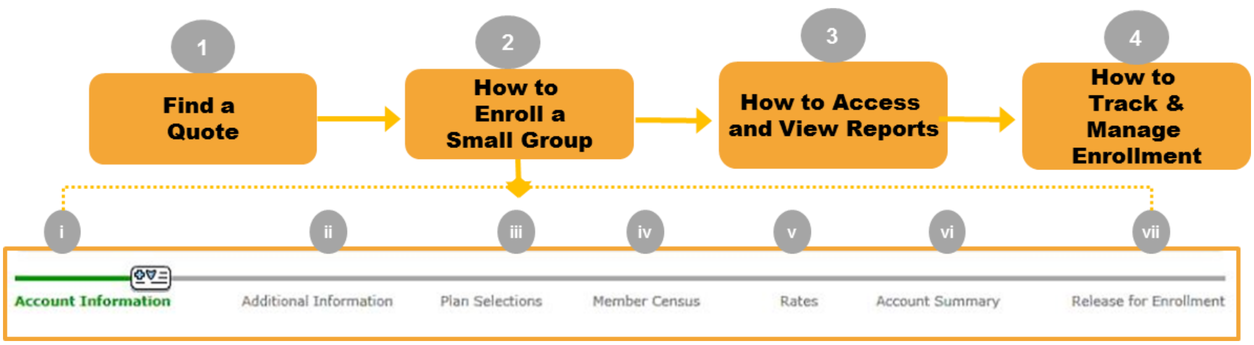
- eSales ACA Small Group Enrollment User Guide

Resources/Contacts

- For technical issues with the eSales enrollment tool, please contact our ITG Service Center at ***888-706-0583.***
- For questions or concerns regarding the eSales Enrollment tool, send inquiries to: **ACASmallGroupEnrollmentSupport@bcbsil.com**

ACA Small Group Enrollment Process

In this job aid, we will discuss the enhancements that have made to the enrollment process applicable to Sales Operations.



The enrollment process includes the following steps:

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

Key Enhancements

While discussing the enhancements, we have aligned the enhancements with the enrollment process steps as discussed on the previous page. This will help you to identify where the enhancements have been included in the process.

Email Notification Field

Step 2: How to Enroll a Small Group > i: Account Information

Ensure that the email address provided is correct. You will receive all communication /notifications regarding your case on this email address. You can update this email address, if required.

Waivers

Step 2: How to Enroll a Small Group > iv: Member Census

You are required to do minimal data entry if a member waives all coverages. You need to enter the following fields for members only:

- Waive Reason Code
- Name (First and Last required, middle initial optional)
- Signature Date

Key Enhancements (contd.)

Rates

Step 2: How to Enroll a Small Group > v. Rates

If the case status is “In Progress”, rates are not visible. The Rate View is disabled so that you do not see invalid rates.

More Information Needed by Underwriting

Step 2: How to Enroll a Small Group > vii: Release for Enrollment

You release the enrollment request for approval. However, if the Underwriting team requires more information, you can make changes or corrections to the request on the online tool. You can upload any missing documents or enter the additional information required. This feature is only enabled when more information is requested.

- **Brokers Notified**: The brokers receives an email notification if the case requires additional or missing information.

Key Enhancements (contd.)

Account Summary Report

Step 2: How to Enroll a Small Group > vi: Account Summary

The Producer’s name is now displayed on the Account Summary Report if the case is enrolled by the General Agent.

New Activities included in History

Step 3: How to Track and Manage Enrollment

History includes new activities "Enrollment Data Entry" and “Enrollment More Info Required.”

Welcome Letter

Step 3: How to Track and Manage Enrollment > iii. Underwriting Approval Received

The Producer’s name is now displayed on the Welcome Letter if the case is enrolled by the General Agent.