



**BlueCross BlueShield
of Texas**

ACA Small Group Enrollment Tool Job Aid

Tool Enhancements/ Enrollment Process Overview



For Producers and General Agents
Effective October 2016

Document Purpose

This job aid provides a quick overview of the eSales ACA Small Group Enrollment tool enhancements. These enhancements are effective October 28, 2016.

Table of Content

Click to jump to the desired section.

- [ACA Small Group Enrollment Process](#)
- [Key Enhancements](#)

Other Reference Materials

Below is a listing of other relevant reference materials:

- eSales ACA Small Group Enrollment User Guide
- eSales ACA Small Group Enrollment Video

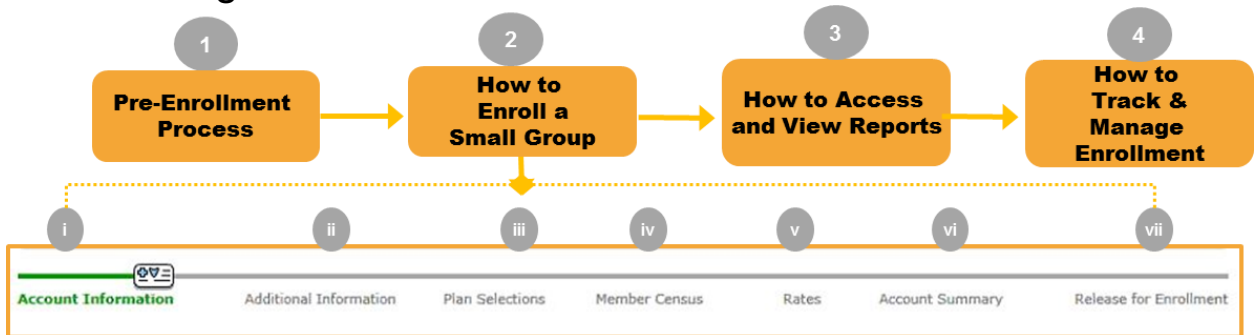
Resources/Contacts

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



Steps to Enroll a Small Group:

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

Key Enhancements

While discussing the changes, 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.

Search Functionality



Step 1: Pre-Enrollment Process

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

Enrollment
Enrollment Home

Search Existing Accounts/Quotes ▾

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

| | | |
|------------------------------------|--------------------------------------|--------------------------------------|
| Account Name: <input type="text"/> | Quote Number: <input type="text"/> | Status: <input type="text"/> |
| Agent: <input type="text"/> | Account Number: <input type="text"/> | Effective Date: <input type="text"/> |
| Division: Texas | Case ID: <input type="text"/> | EIN: <input type="text"/> |
| Request ID: <input type="text"/> | | |




Key Enhancements (contd.)

Account Information: Physical Address

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

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

Attention

-  The Address provided appears to be incorrect. Please input the correct Address.
-  The City provided appears to be incorrect. Please input the correct City.
-  As per entered address details, county selected is not valid. Please select as county in primary address.

Account Information: Producer/General Agent /Subproducer Fields

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

You can now clear an entry in the Primary Producer General Agent/Subproducer fields and re-enter the desired values. Click **Clear** to remove the name and enter the required name.

Key Enhancements (contd.)

Account Information: Email Address Validation

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

You will be required to re-enter a valid email address to ensure that you receive all system generated notifications. If the entries do not match, then you will see the following error message: *“The email addresses do not match.”*

In this example, we have entered only the Producer’s email ID.

Producer Information

Primary Producer


*Primary Producer Name:

Tax ID/SSN: Producer #:

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

Telephone #: Complete Address:

Fax #:

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

General Agent

General Agent Name:

Tax ID/SSN: Producer #:

E-Mail Address: Confirm E-Mail Address:

Telephone #: Complete Address:

Fax #:

Subproducer

Subproducer Name:

Subproducer #:

* - Required

Key Enhancements (contd.)

Additional Information: Fields No Longer Captured

Step 3: How to Enroll a Small Group > ii. Additional Information

The following fields will no longer be captured:

- Is the company headquarters in Texas?:
- Is this an independent school district that is a large employer electing to participate as a small employer?:
- Do all employees reside in Texas?:
- Is this a Public Entity Group?:
- Will you have been without group coverage (uninsured) for at least two months prior to the requested Contract(s)/Policy(ies) effective date of coverage?:
- Electronic Receipt of Certificate Booklets and Contracts?:
- Is Texas the state with the greatest number of employees eligible to enroll in this group plan?:

Additional Information: Fields No Longer Captured

Step 3: How to Enroll a Small Group > ii. Additional Information

The following fields will no longer be captured:

Complete If Group Currently Has Health Care Coverage:

- a. Paid-to-date with current carrier:
- b. Calendar year medical deductible amount:
 - \$ Individual
 - \$ Family

Key Enhancements (contd.)

Additional Information: Current Health Carrier



Step 2: How to Enroll a Small Group > ii: Additional Information

The **Current Health Carrier** is now available as a drop-down above the **Eligibility** section and will include the following values:

- Aetna Health and Life Insurance Co.
- Cigna Life Insurance Co.
- Humana Insurance Co.
- United Healthcare
- Other
- Unknown

It is a mandatory field. You will receive an error message, "Current Health Carrier is a required field", if you do not select a value in the drop-down.

This field is no longer available under the **Complete If Group Currently Has Health Care Coverage** section.

Key Enhancements (contd.)

Plan Selections: In-Vitro Plans

Step 2: How to Enroll a Small Group > iii: Plan Selections

You can now compare the In-Vitro and without In-Vitro plans side-by-side on **Plan Selections** screen when **In-Vitro Coverage** is selected as **"Yes"**. With this enhancement, you are able to compare the two plans and make an informed decision.

You will also view the static message pertaining to “with In-Vitro plans”. There will be no change in the verbiage. You can now continue to view only “without In-vitro plan IDs” when In-Vitro Coverage is selected as **"No"**.

| Plan Selections | | | | | | | | | | | |
|---|------------|------------|--------------------------|--------------|------------|-----------------------------------|------------|----------------|-------------------|-----------|---------------------------|
| Previous | | | | | | | | | | | Continue |
| Health <input type="radio"/> Yes <input checked="" type="radio"/> No In-Vitro Coverage: <input checked="" type="radio"/> Yes <input type="radio"/> No | | | | | | | | | | | |
| All Plans shown below are In-Vitro eligible. Texas Department of Insurance mandates that the option to purchase In-Vitro Fertilization (IVF) be made available to applying groups. Employers have the option of accepting or declining the IVF benefits. If the IVF benefit is elected, significant rating impacts will apply. | | | | | | | | | | | |
| Blue Choice PPO Network | | | | | | | | | | | |
| In-Vitro Plan # | Plan # | Ded In/Out | Office Visit/ Specialist | Coins In/Out | OPX In/Out | ER Copay ^{1,2} /ER Coins | IP In/Out | OP Surg In/Out | Ped Dental In/Out | Rx ** | |
| DPO Plans | | | | | | | | | | | |
| Blue Platinum Plans | | | | | | | | | | | |
| <input type="checkbox"/> | P602CHC | P600CHC | \$250/\$500 | \$25/\$45 | 80%/60% | \$1250/\$2500 | \$300/80% | \$150/\$250 | \$100/\$200 | 70%/70% | \$0/\$10/\$35/\$75/\$150 |
| <input type="checkbox"/> | P610CHC | P601CHC | \$1250/\$2500 | \$25/\$45 | 100%/100% | \$1250/\$2500 | \$300/100% | \$150/\$250 | \$100/\$200 | 100%/100% | \$0/\$10/\$35/\$75/\$150 |
| Blue Gold Plans | | | | | | | | | | | |
| <input type="checkbox"/> | G602CHC | G620CHC | \$1250/\$2500 | \$20/\$60 | 100%/80% | \$4500/\$9000 | \$300/100% | \$150/\$250 | \$100/\$200 | 70%/70% | \$0/\$10/\$50/\$100/\$150 |
| <input type="checkbox"/> | G603CHC | G623CHC | \$1250/\$2500 | \$30/\$50 | 80%/60% | \$3500/\$7000 | \$400/80% | NA/NA | NA/NA | 70%/70% | \$15/\$30/\$45 |
| <input type="checkbox"/> | G604CHC | G622CHC | \$1500/\$3000 | \$10/\$60 | 80%/60% | \$3500/\$7000 | \$400/80% | \$200/\$300 | \$150/\$250 | 70%/70% | \$0/\$10/\$35/\$75/\$150 |
| <input type="checkbox"/> | G606CHC | G621CHC | \$3125/\$6250 | \$25/\$50 | 100%/100% | \$3125/\$6250 | \$400/100% | NA/NA | NA/NA | 100%/100% | \$10/\$40/\$60 |
| <input type="checkbox"/> | G609CHC | G617CHC | \$1000/\$2000 | \$20/\$40 | 80%/60% | \$3900/\$7800 | \$400/80% | NA/NA | NA/NA | 70%/70% | \$15/\$40/\$55 |
| <input type="checkbox"/> | G610CHC | G616CHC | \$3000/\$6000 | \$30/\$50 | 100%/100% | \$3000/\$6000 | \$400/100% | \$200/\$300 | \$150/\$250 | 100%/100% | \$0/\$10/\$50/\$100/\$150 |
| Blue Silver Plans | | | | | | | | | | | |
| <input type="checkbox"/> | S601CHC *1 | S610CHC | \$2000/\$4000 | \$40/\$70 | 70%/50% | \$6850/\$13700 | \$500/70% | \$250/\$350 | \$200/\$300 | 70%/70% | \$0/\$10/\$50/\$100/\$150 |
| <input type="checkbox"/> | S602CHC *1 | S611CHC | \$2500/\$5000 | \$40/\$60 | 80%/60% | \$6600/\$13200 | \$500/80% | \$250/\$350 | \$200/\$300 | 70%/70% | \$0/\$10/\$50/\$100/70% |
| <input type="checkbox"/> | S604CHC | S607CHC | \$3000/\$6000 | \$30/\$50 | 80%/60% | \$6350/\$12700 | \$500/80% | \$250/\$350 | \$200/\$300 | 70%/70% | \$0/\$10/\$50/\$100/\$150 |
| <input type="checkbox"/> | S605CHC | S608CHC | \$3000/\$6000 | \$40/\$60 | 70%/50% | \$6000/\$12000 | \$500/70% | NA/NA | NA/NA | 70%/70% | \$20/\$40/\$60 |
| <input type="checkbox"/> | S615CHC | S606CHC | \$6000/\$12000 | \$20/\$40 | 100%/100% | \$6000/\$12000 | NA/100% | NA/NA | NA/NA | 100%/100% | \$0/\$10/\$35/\$75/\$150 |
| <input type="checkbox"/> | S616CHC | S600CHC | \$6000/\$12000 | \$20/\$40 | 100%/100% | \$6000/\$12000 | \$500/100% | \$250/\$350 | \$200/\$300 | 100%/100% | \$0/\$10/\$50/\$100/\$150 |
| Blue Bronze Plans | | | | | | | | | | | |
| <input type="checkbox"/> | B604CHC | B600CHC | \$6850/\$13700 | NA/NA | 100%/100% | \$6850/\$13700 | NA/100% | NA/NA | NA/NA | 100%/100% | 100% |
| HSA Plans | | | | | | | | | | | |
| Blue Gold Plans | | | | | | | | | | | |
| <input type="checkbox"/> | G605CHC | G619CHC | \$3000/\$6000 | NA/NA | 100%/100% | \$3000/\$6000 | NA/100% | NA/NA | NA/NA | 100%/100% | 100% |
| <input type="checkbox"/> | G608CHC | G613CHC | \$4000/\$8000 | NA/NA | 100%/100% | \$4000/\$8000 | NA/100% | NA/NA | NA/NA | 100%/100% | 100% |
| Blue Silver Plans | | | | | | | | | | | |
| <input type="checkbox"/> | S603CHC | S612CHC | \$2600/\$5200 | NA/NA | 80%/60% | \$4400/\$8800 | NA/80% | NA/NA | NA/NA | 70%/70% | 90%/90%/80%/70%/60% |
| <input type="checkbox"/> | S613CHC | S609CHC | \$5000/\$10000 | NA/NA | 100%/100% | \$5000/\$10000 | NA/100% | NA/NA | NA/NA | 100%/100% | 100% |
| Blue Bronze Plans | | | | | | | | | | | |
| <input type="checkbox"/> | B605CHC | B633CHC | \$6450/\$12900 | NA/NA | 100%/100% | \$6450/\$12900 | NA/100% | NA/NA | NA/NA | 100%/100% | 100%/NA/NA/NA/NA |
| <input type="checkbox"/> | B606CHC | B634CHC | \$5000/\$10000 | NA/NA | 80%/60% | \$6450/\$12900 | NA/80% | NA/NA | NA/NA | 70%/70% | 90%/90%/80%/70%/60% |
| <input type="checkbox"/> | B607CHC | B601CHC | \$6000/\$12000 | NA/NA | 100%/100% | \$6000/\$12000 | NA/100% | NA/NA | NA/NA | 100%/100% | 100% |

Key Enhancements (contd.)

Member Census: Import Census



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

To provide clarity when working with the Member Census Import file, additional details have been added to the “Import Census” pop up screen

- A new **Help** file is now available to review and download. This file includes information on proper formatting and expected values that may be needed in each column.
- Steps to properly download and save the import file.
- Clear definitions for the **Overwrite** or **Append** import file function
- Clarification for **Override and Import** upload option
- Legend key for warning and error symbols

Import Census

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

Steps to save the Import Census Template:

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

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

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

Overwrite - This option will replace previously entered census information.

Append - This option will add to existing census information

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

Attention

Warning Message

indicates Error Message

indicates Warning Message

Key Enhancements (contd.)

Release for Enrollment: Composite Rate Billing Method Declaration Form



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

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

| Documents Needed for Enrollment | | |
|--|------------|--------------------|
| * Employer Group Information (EGI) Form | ✓ Attached | Signature Required |
| * Enrollment Application/Change Form | ✓ Attached | Signature Required |
| * Wage & Tax Statement/Proof of Wages | ✓ Attached | |
| * Benefit Program Application (BPA) for New Small Groups 2-50 | ✓ Attached | Signature Required |
| Affidavit of Domestic Partnership | | Signature Required |
| BenefitWallet Discovery Form | | |
| Composite Rate Billing Method Declaration Form | ✓ Attached | |
| Dependent State Continuation of Coverage Form | | Signature Required |

Reports Button: EFT Payment Details



Step 3: How to Access and View Reports

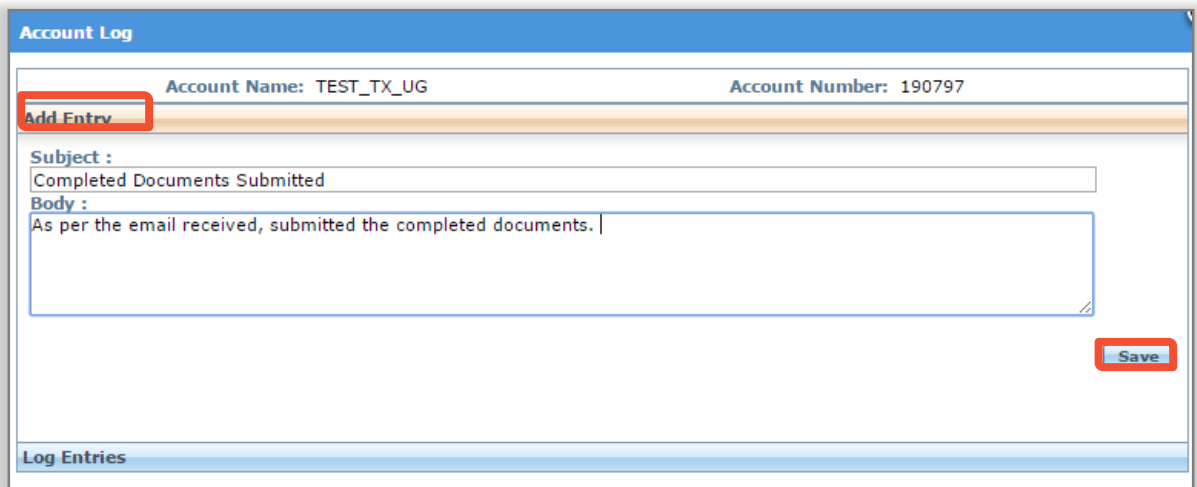
A new Electronic Funds Transfer (EFT) Detail report is available in the **Reports** tab. This report will capture the EFT information entered into the enrollment tool, if EFT was selected as the Binder Payment option. This report is informational only and is not required to be submitted as part of the enrollment process.

Key Enhancements (contd.)

Log Button: More Information Required Entries

Step 4: How to Track and Manage Enrollment > More Information Required

When alerted for a “*More Information Required*” request, you can now communicate directly with the assigned Underwriter by providing additional details pertaining to your case in the **Log**. Click the **Log** button, click **Add Entry**. Enter the details in the **Account Log** pop-up window. Click **Save**.



Account Log

Account Name: TEST_TX_UG Account Number: 190797

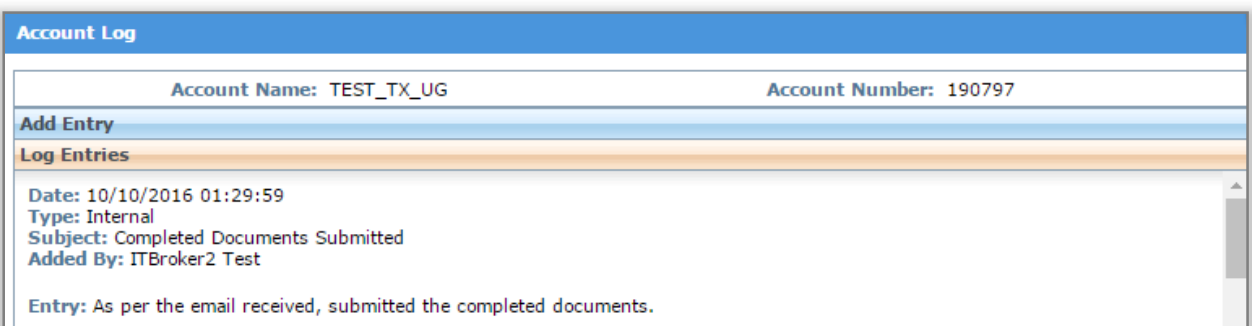
Add Entry

Subject :
Completed Documents Submitted

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

Save

Log Entries



Account Log

Account Name: TEST_TX_UG Account Number: 190797

Add Entry

Log Entries

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

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

Key Enhancements (contd.)

More Information Required: Aging Alerts



Step 4: How to Track and Manage Enrollment > More Information Required

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

Aging Email Sample

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

- Missing/Incorrect/Incomplete Document (s)

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

Additional Notes: Incomplete Documents.

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

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

HCSC Company Disclaimer

The information contained in this communication is confidential, private, proprietary, or otherwise privileged and is intended only for the use of the addressee. Unauthorized use, disclosure, distribution or copying is strictly prohibited and may be unlawful. If you have received this communication in error, please notify the sender immediately at (312) 653-6000 in Illinois; (800) 447-7828 in Montana; (800)835-8699 in New Mexico; (918)560-3500 in Oklahoma; or (972)766-6900 in Texas.

Key Enhancements (contd.)

More Information Required: Aging Alerts



Step 4: How to Track and Manage Enrollment > More Information Required

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

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