BlueCross BlueShield of Texas

ACA Small Group Enrollment Tool
User Guide

For Producers and *General Agents*

Effective October 2017

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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 ACA Small Group Enrollment tool.

Important: We encourage Producers to use the eSales ACA Small Group Enrollment tool. Enrolling groups through this tool and submitting clean cases eliminates some internal processing steps thus improving the turnaround time from quote to approval.

Overview of the Enrollment Process

The eSales ACA Small Group 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.

Let's review the steps to enroll a small group (1-50 employees) using the eSales ACA Small Group Enrollment tool.

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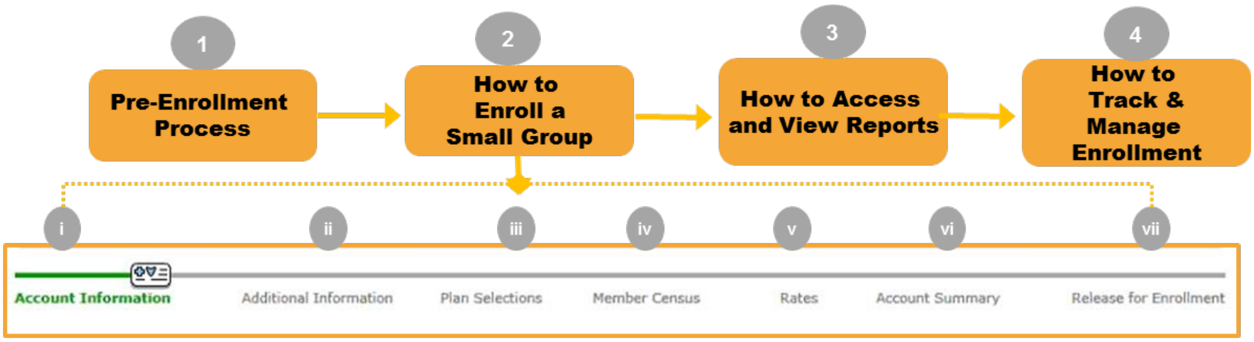
Overview of the Enrollment Process (Contd.)



Once you have gathered the necessary information and documentation from your client, you access the eSales ACA Small Group 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.

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

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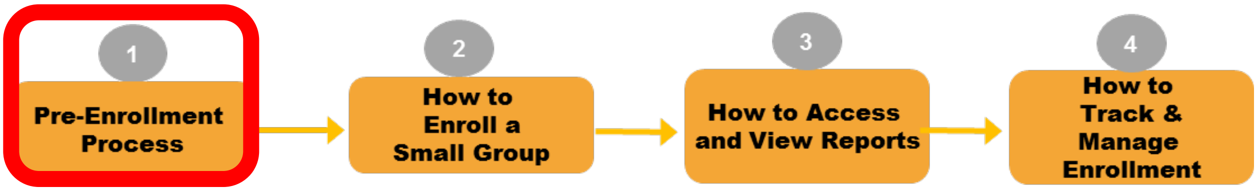
1 Pre-Enrollment Process

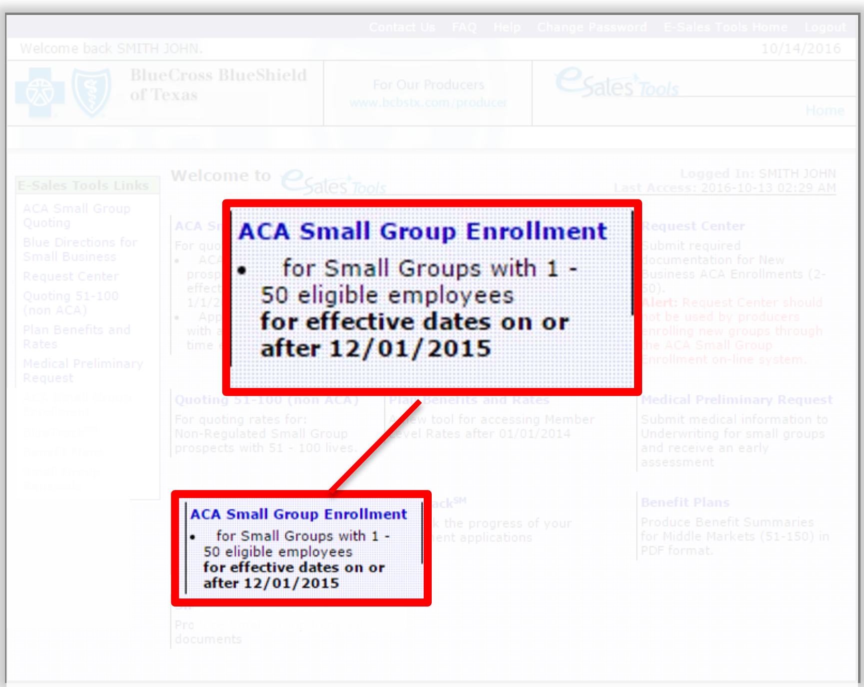


Let’s begin the online enrollment process. First, you must logon to the Blue Access for Producers (BAP) or the Producer Portal, and navigate to the eSales Tools home page.

Accessing the eSales ACA Small Group Enrollment Tool

A new link has been added to the eSales Tools home page. At this time, it is recommended to use Internet Explorer or Google Chrome web browsers to access the Enrollment tool.

After you create a quote using the **eSales quoting application**, you return to the eSales Tools Home page, and click **ACA Small Group Enrollment** link to begin the enrollment process.



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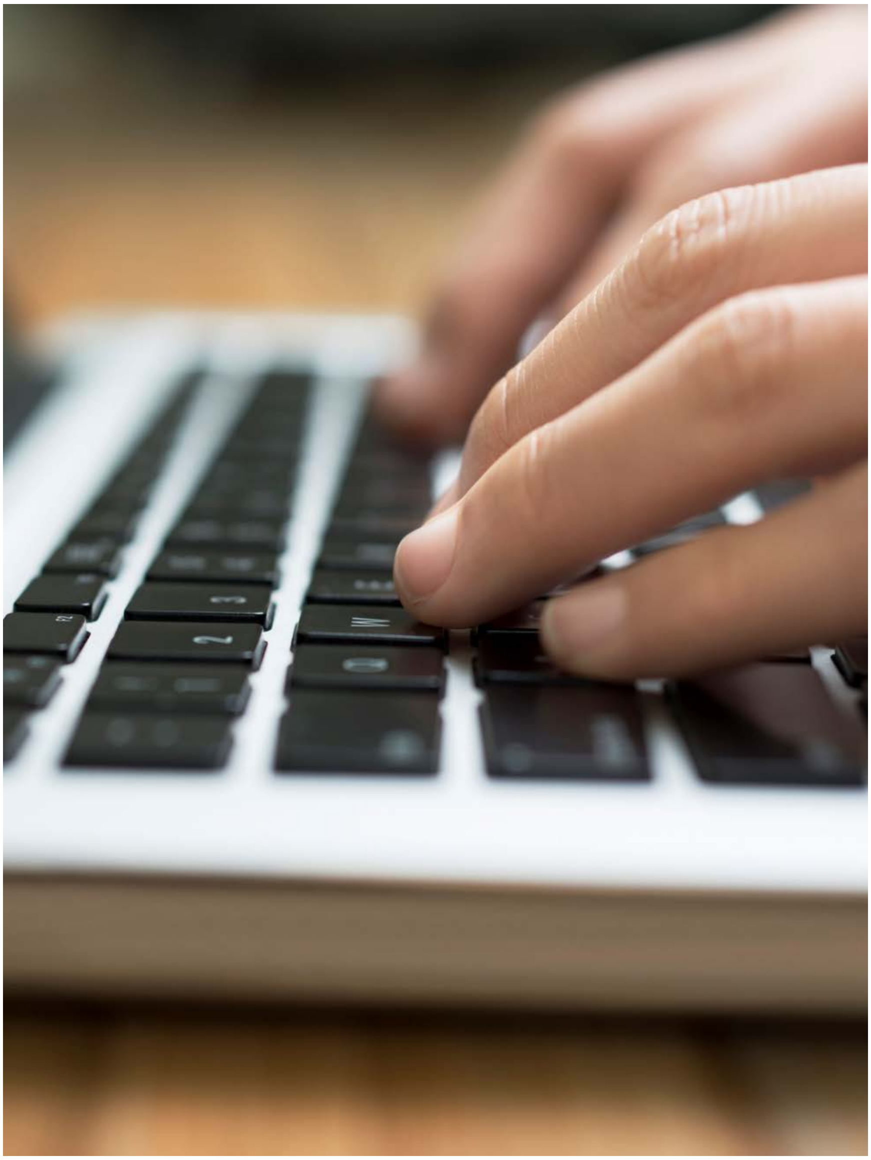

Enrollment with a Quote

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

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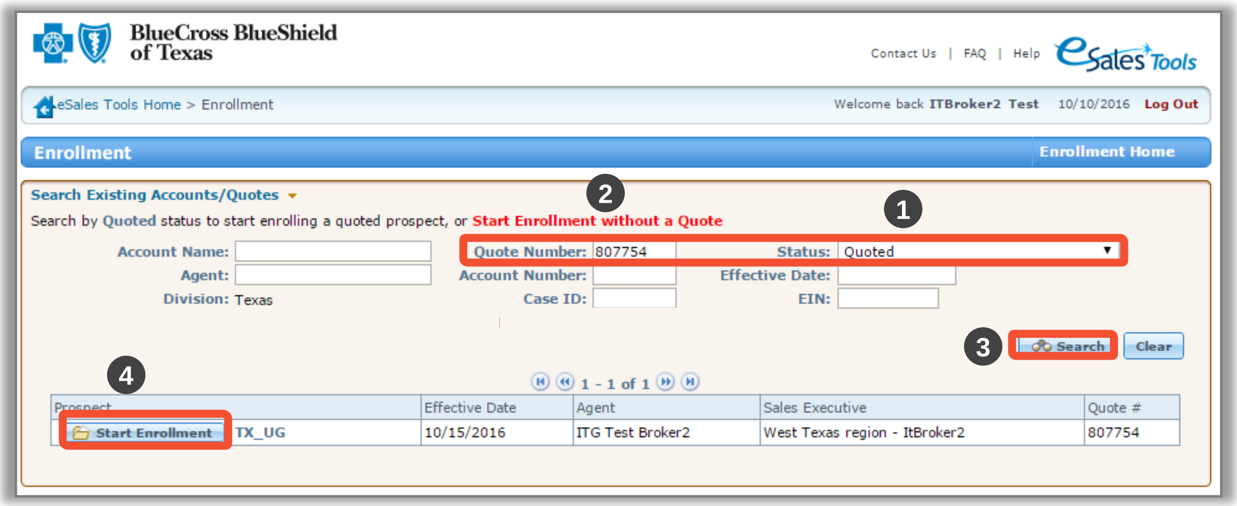
1 Pre-Enrollment Process (Contd.)

Enrolling with a Quote

Once you have logged on to the producer portal and clicked the **ACA Small Group Enrollment** link within the eSales Tools, you can start the enrollment process.

From the Enrollment home page, you can now enroll a small group with a quote and without a quote.



To enroll with a quote;

1. Search for the quote using the Quote Number or any portion of the Account Name.
2. From the **Status** drop-down list, select **Quoted**.
3. Click **Search** or hit the **Enter** key on the keyboard.
4. After you find your required quote, click **Start Enrollment**.

Note:

- Search by **Pre-Enrollment** only if returning to a case that is already in the enrollment process.
- Enrolling cases that have not been released for enrollment review will be auto discontinued by the system 60 days from the effective date.

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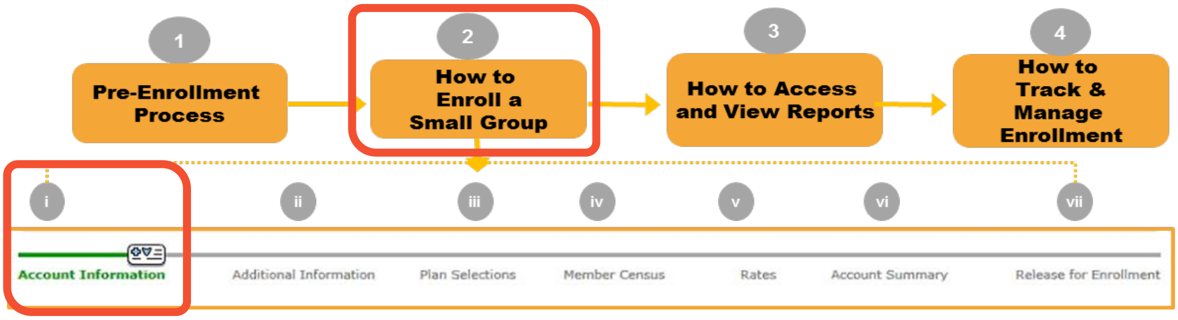
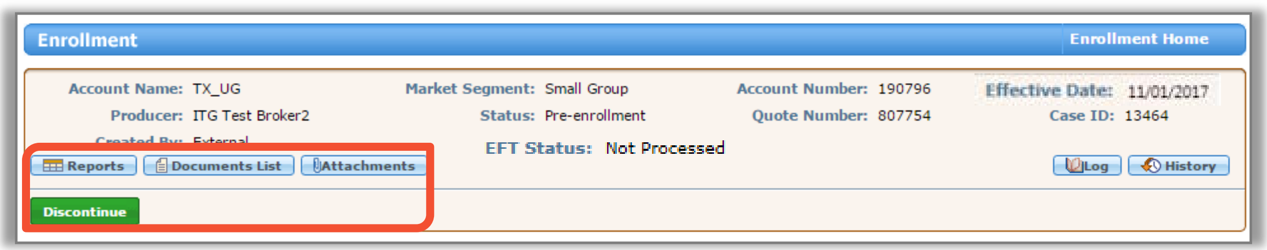
2 How to Enroll a Small Group

I. Account Information



Overview of Functionality and Navigation

On each screen of the enrollment tool, you see a progress bar that highlights the current step or screen in green. We have used the same progress bar to walk you through this user guide.



Step i: Account Information

After you search for the quote, and click **Start Enrollment**, the **Account Information** screen is displayed. At the top of each screen, you see the following buttons:

- **Reports:** Opens a list of available reports.
- **Documents List:** Opens a list of required documents.
- **Discontinue:** Allows users to discontinue a case any time throughout the enrollment process.
- **Attachments**: Allows users to attach the required documents. This functionality will be discussed in more detail later in the training.

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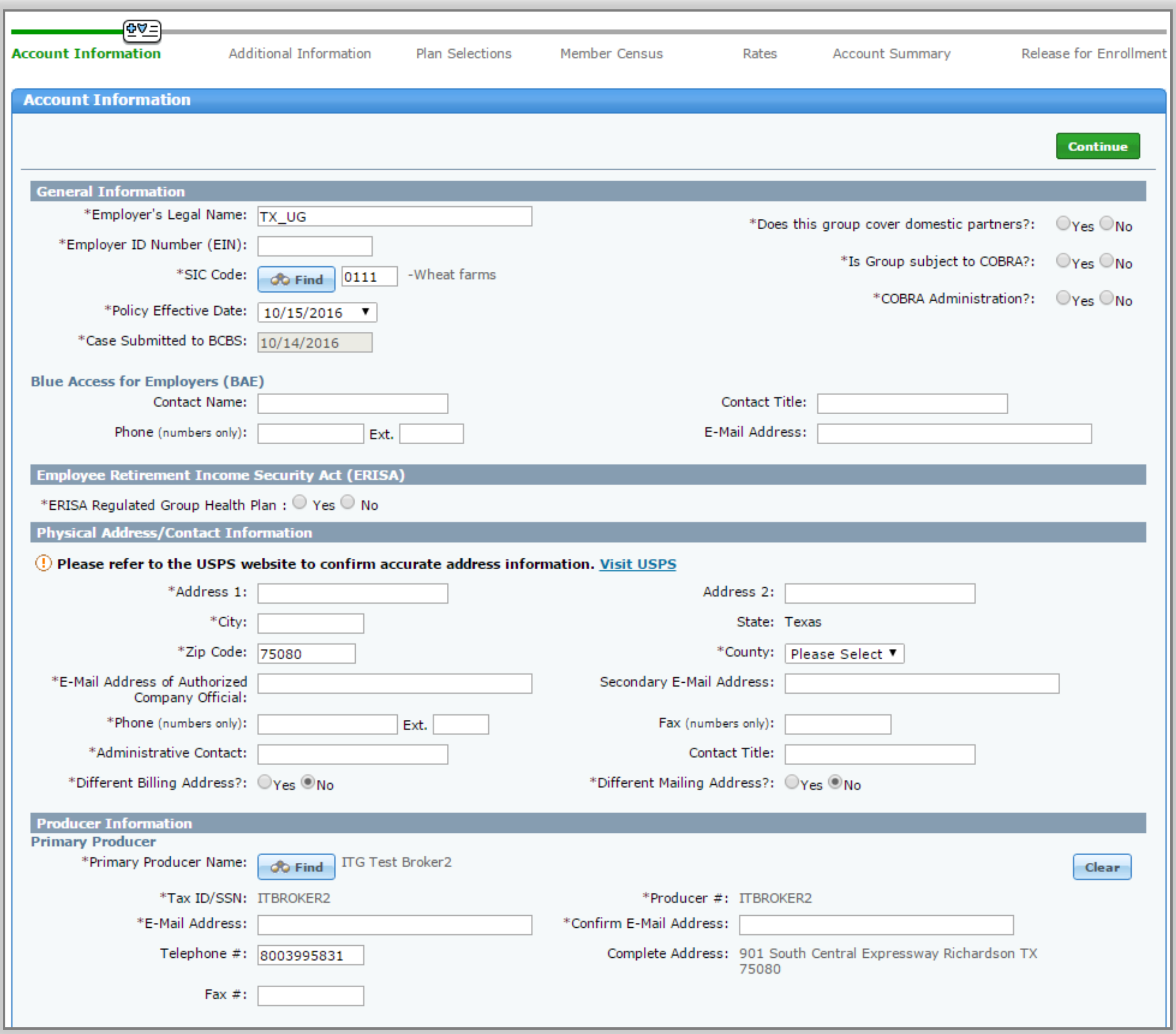
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)

On this screen, enter the information in the required fields. All fields marked with an asterisk (*) are required. Some data is already populated in the fields.


Account Information | Additional Information | Plan Selections | Member Census | Rates | Account Summary | Release for Enrollment

Account Information

Continue

General Information

*Employer's Legal Name: TX_UG
*Employer ID Number (EIN):
*SIC Code: Find 0111 -Wheat farms
*Policy Effective Date: 10/15/2016
*Case Submitted to BCBS: 10/14/2016
*Does this group cover domestic partners?: Yes No
*Is Group subject to COBRA?: Yes No
*COBRA Administration?: Yes No

Blue Access for Employers (BAE)

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

Employee Retirement Income Security Act (ERISA)

*ERISA Regulated Group Health Plan : Yes No

Physical Address/Contact Information

Please refer to the USPS website to confirm accurate address information. Visit USPS

*Address 1:
Address 2:
*City:
State: Texas
*Zip Code: 75080
*County: Please Select
*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

Producer Information

Primary Producer

*Primary Producer Name: Find ITG Test Broker2
Clear
*Tax ID/SSN: ITBROKER2
*Producer #: ITBROKER2
*E-Mail Address:
*Confirm E-Mail Address:
Telephone #: 8003995831
Complete Address: 901 South Central Expressway Richardson TX 75080
Fax #:

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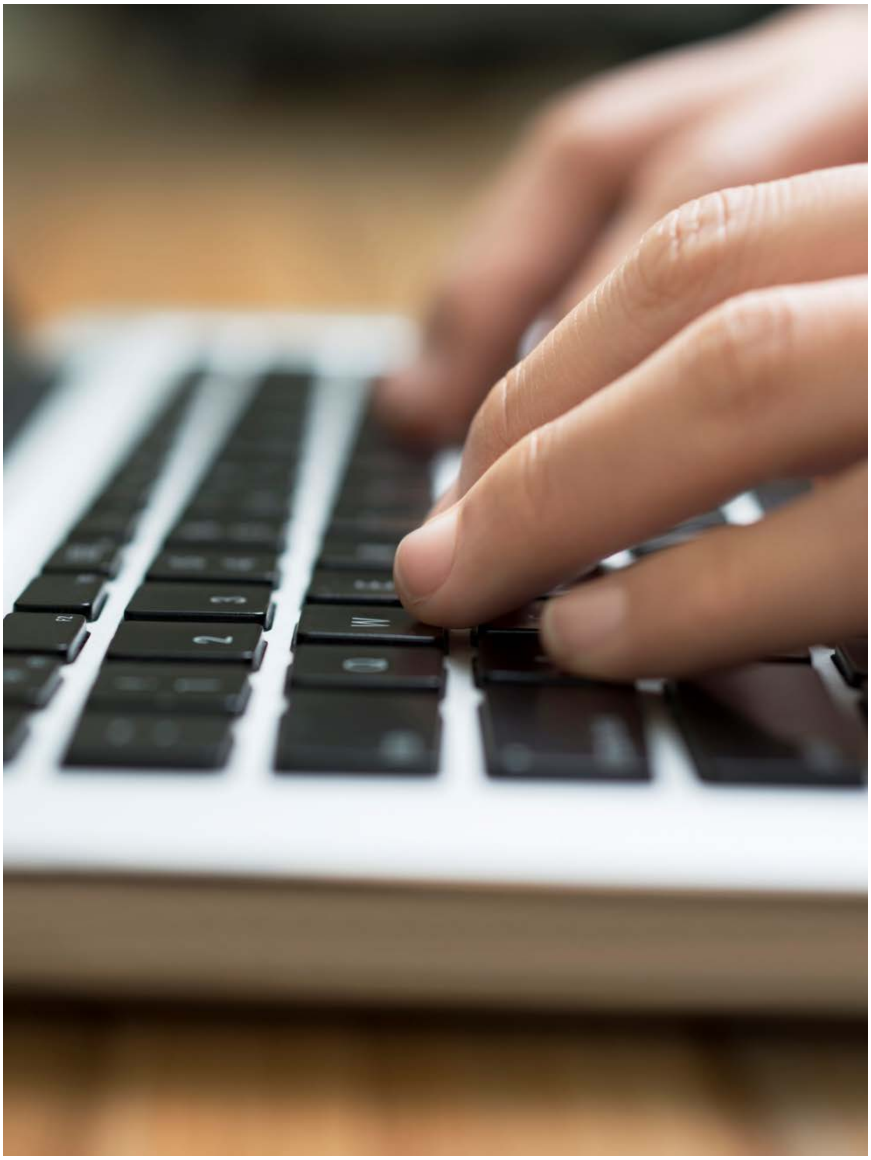

Enrollment without a Quote

Steps to start an enrollment process without a quote in eSales Tools.

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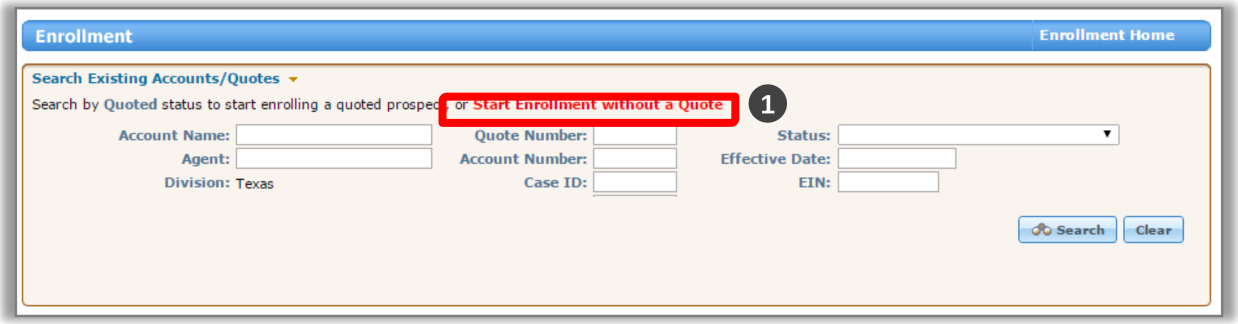
1 Pre-Enrollment Process (Contd.)

Enrolling without a Quote

You can also start the enrollment process without a quote.

1. Click **Start Enrollment without a Quote**.



Note: In this User Guide, we will continue to use the **Start Enrollment without a Quote** option to explain the ACA Small Group Enrollment process.

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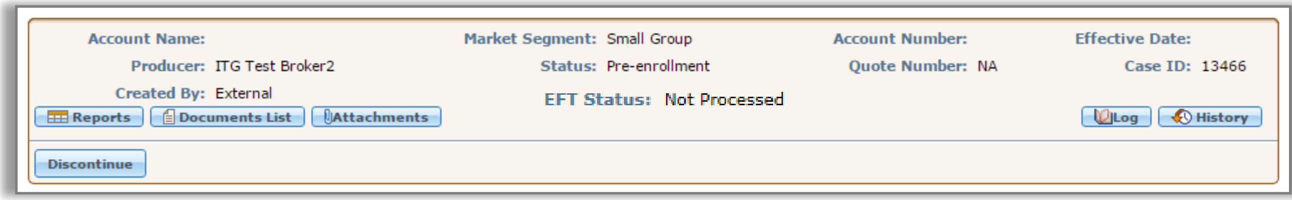
2 How to Enroll a Small Group (Contd.)

I. Account Information



When an enrollment is started **without a quote**, some of the information on the page header will remain blank until the data is manually entered on the **Account Information** screen.

Other information will pre-populate for you:

- **Account Name**: blank
- **Market Segment**: **Small Group**
- Account Number: blank
- Effective Date: blank
- **Producer**: **Producer name, unless General Agent is enrolling the case.** In this example, ITG Test Broker2.
- **Status**: **Pre-Enrollment**
- Quote Number: NA
- **Case ID**: **Unique number assigned to case.** In this example, 13466.
- **Created By**: **External**
- **EFT Status–** Payment Status.

An Account Number will be reserved when you advance to the **Release for Enrollment** screen. The report links in the **Reports** button will also become active on this screen.

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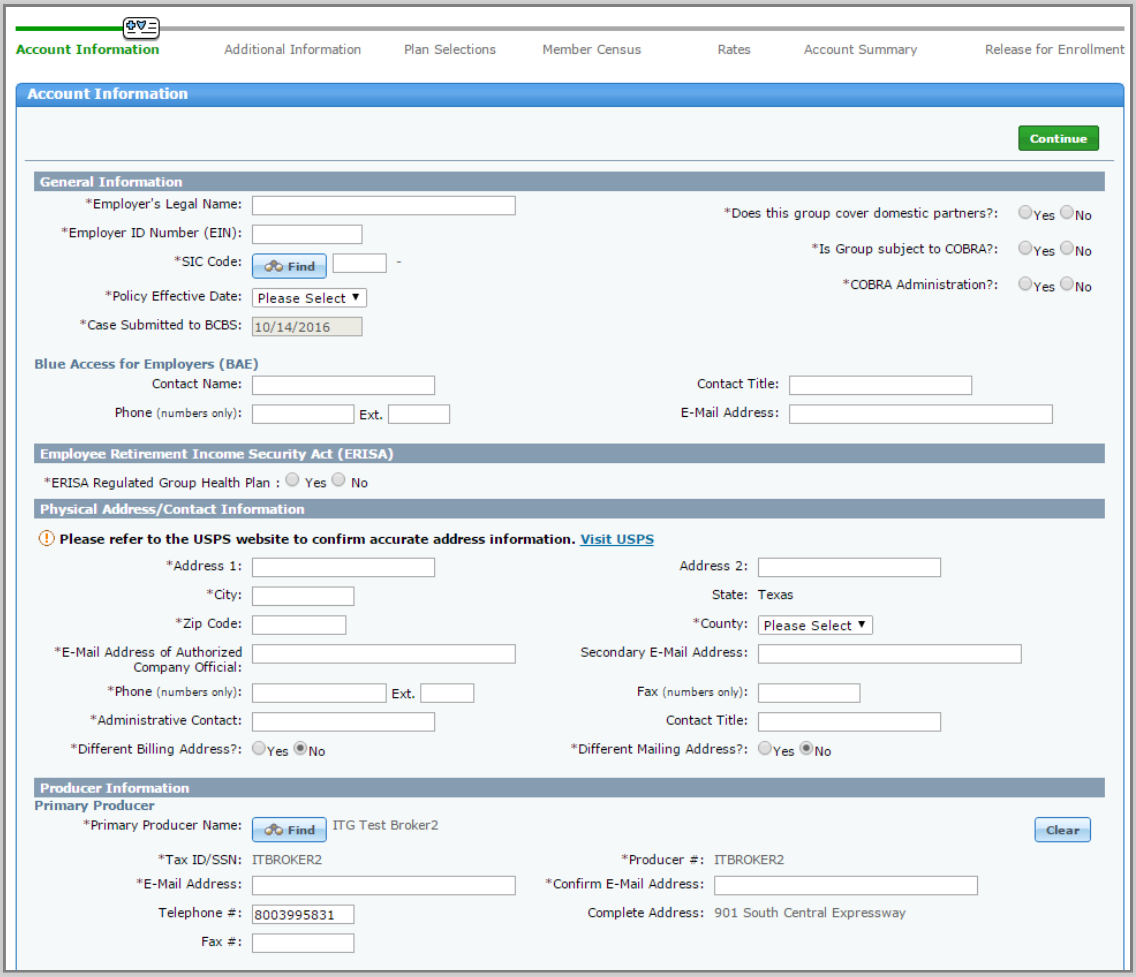
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)



When you start enrollment without a quote, the **Account Information** screen will be blank. You have to manually enter the data in all the required fields.

Note: The system will time out after several minutes of inactivity. Information is saved by clicking the green **Continue** button.

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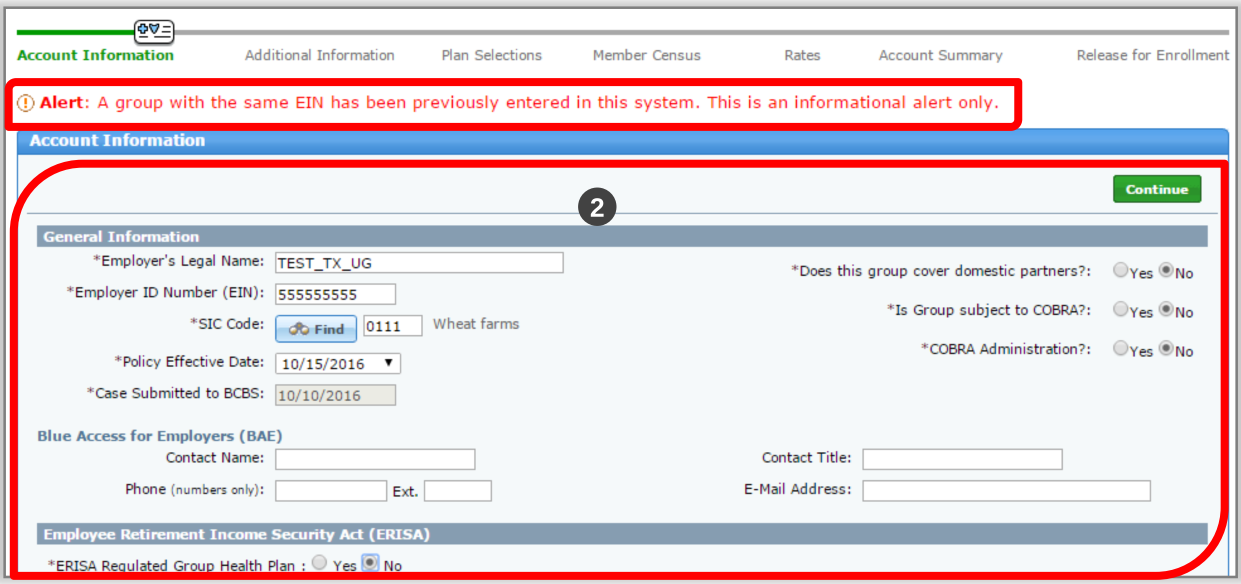
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)

2. Enter the required information under the General Information section. The required fields are marked with an asterisk (*).



Note: If enrolling a group with an EIN already in our system, the tool will display the following alert. "*Alert: A group with the same EIN has been previously entered in this system. This is an informational alert only*." However, the tool will still allow you to enroll the case.

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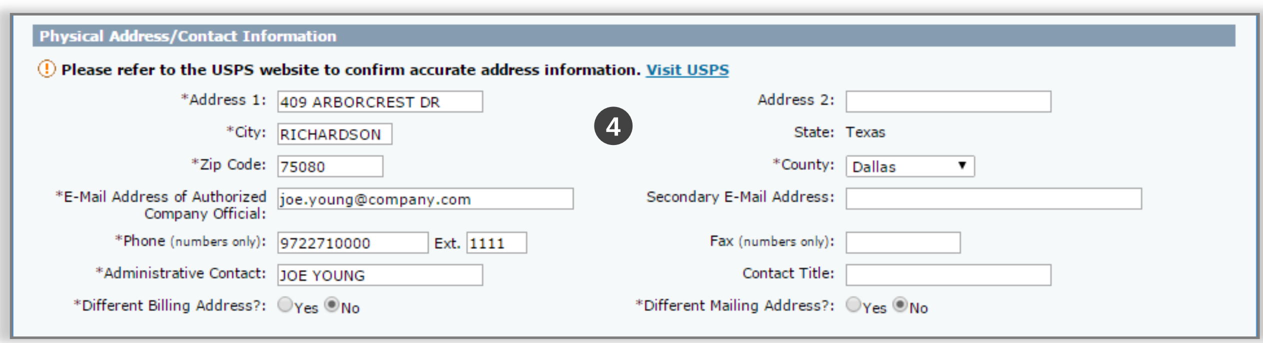
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)

3. Answer the **Employee Retirement Income Security Act (ERISA)** question. When the **Yes** radio button is selected, additional fields will populate. In this example, we select ERISA as **No**.

4. Enter the **Company's Physical Address/Contact** 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.



Note: When the zip code does not default, the user must select the county from the drop-down list. Please click the USPS link to check for the appropriate county. Incorrect county selection could result in incorrect rates.

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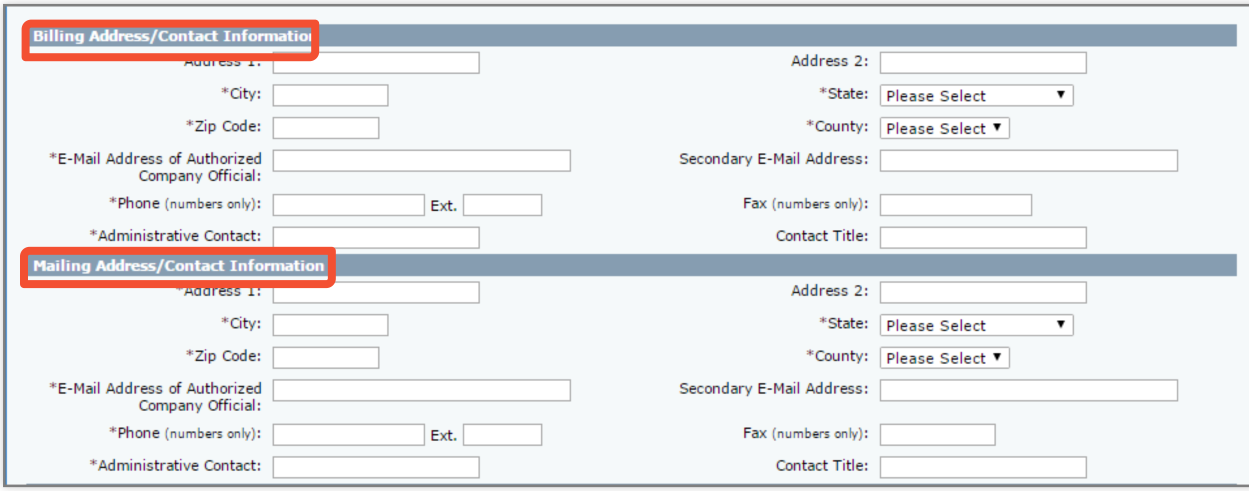
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)



Optional Step:
If there are separate physical and mailing addresses, select the **Yes** radio button for billing address and **No** radio button for the mailing address to populate the additional mailing address fields. If **Yes** is selected for the 'different billing' and/or 'different mailing address' questions, additional fields will populate. Enter all required information.

Important! *Until further notice, if a group has multiple addresses, for the physical address, select **Yes** for billing address, and **No** for mailing address.*

Note: Out of state addresses are acceptable in the billing and mailing address sections.

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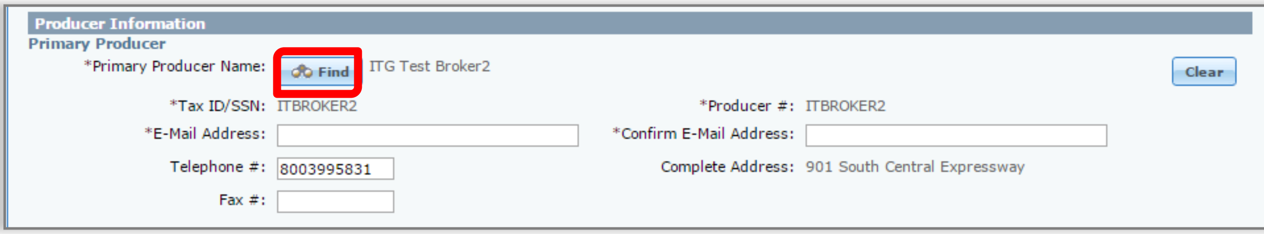
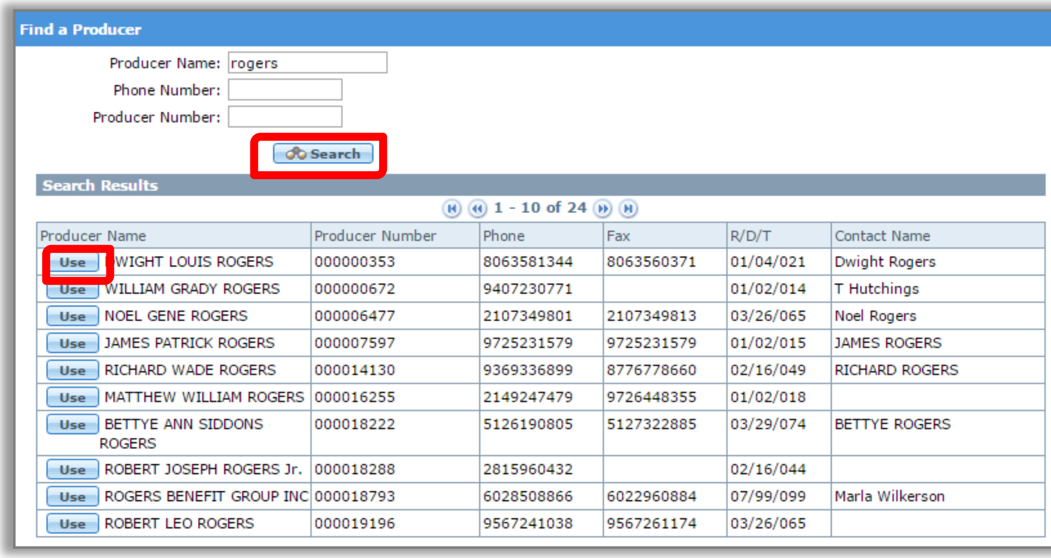
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)


Producer Information
Primary Producer
*Primary Producer Name: Find ITG Test Broker2 Clear
*Tax ID/SSN: ITBROKER2 *Producer #: ITBROKER2
*E-Mail Address: *Confirm E-Mail Address:
Telephone #: 8003995831 Complete Address: 901 South Central Expressway
Fax #:


Find a Producer
Producer Name: rogers
Phone Number:
Producer Number:
Search
Search Results
1 - 10 of 24

Producer Name	Producer Number	Phone	Fax	R/D/T	Contact Name
Use WIGHT LOUIS ROGERS	000000353	8063581344	8063560371	01/04/021	Dwight Rogers
Use WILLIAM GRADY ROGERS	000000672	9407230771		01/02/014	T Hutchings
Use NOEL GENE ROGERS	000006477	2107349801	2107349813	03/26/065	Noel Rogers
Use JAMES PATRICK ROGERS	000007597	9725231579	9725231579	01/02/015	JAMES ROGERS
Use RICHARD WADE ROGERS	000014130	9369336899	8776778660	02/16/049	RICHARD ROGERS
Use MATTHEW WILLIAM ROGERS	000016255	2149247479	9726448355	01/02/018	
Use BETTYE ANN SIDDONS ROGERS	000018222	5126190805	5127322885	03/29/074	BETTYE ROGERS
Use ROBERT JOSEPH ROGERS Jr.	000018288	2815960432		02/16/044	
Use ROGERS BENEFIT GROUP INC	000018793	6028508866	6022960884	07/99/099	Marla Wilkerson
Use ROBERT LEO ROGERS	000019196	9567241038	9567261174	03/26/065	

Optional Step: In the **Producer Information** section, the Primary Producer and/or General Agent (GA) information will appear blank. If you want to update the Primary Producer or Subproducer (writing agent) click **Find**. Enter any portion of the Producer's, General Agent's or Sub Producer's Name, Phone Number or Producer Number.

In this example, we search by the **Producer's** name. Click **Search.** Once the appropriate Producer is displayed, select the name by clicking **Use**. After selecting a Producer, you are automatically re-directed to the **Account Information** screen.

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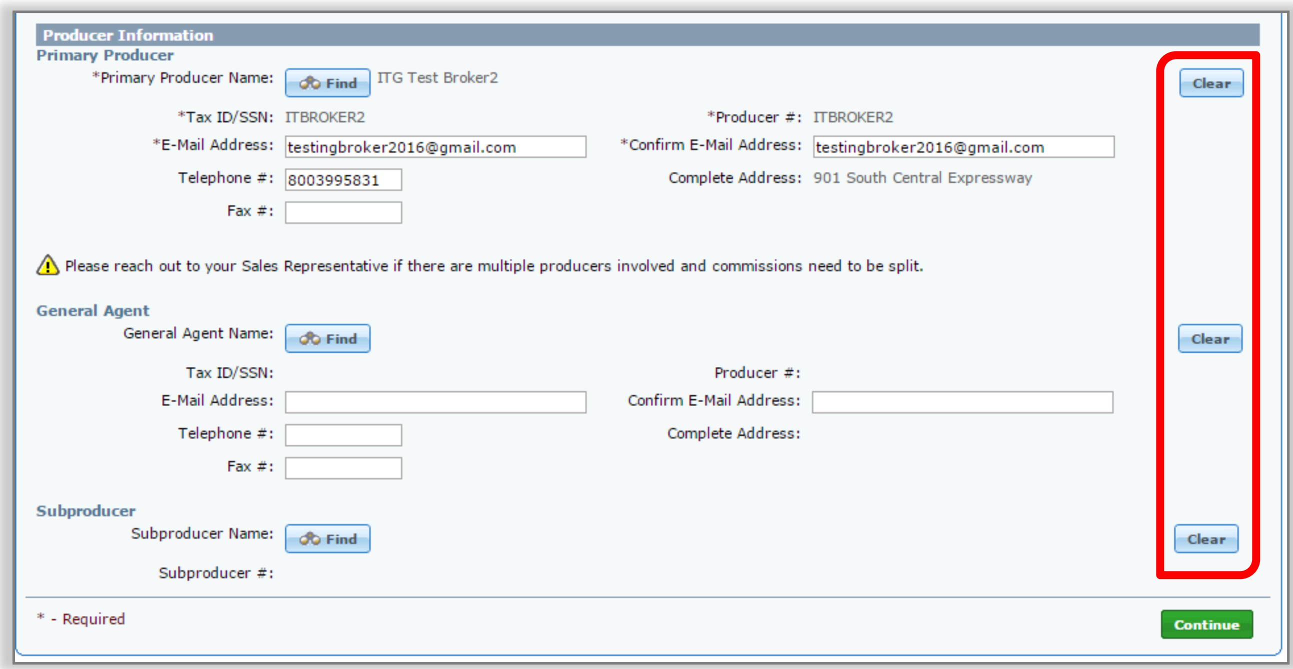
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)



Optional Step (contd.): In this example, you have searched and updated the Producer's name. If you want to change the Primary Producer / General Agent / Subproducer's name, you can click **Clear** to remove the name in the fields and enter the desired value directly.

Important! *If there are split commissions, contact your Sales Representative.*

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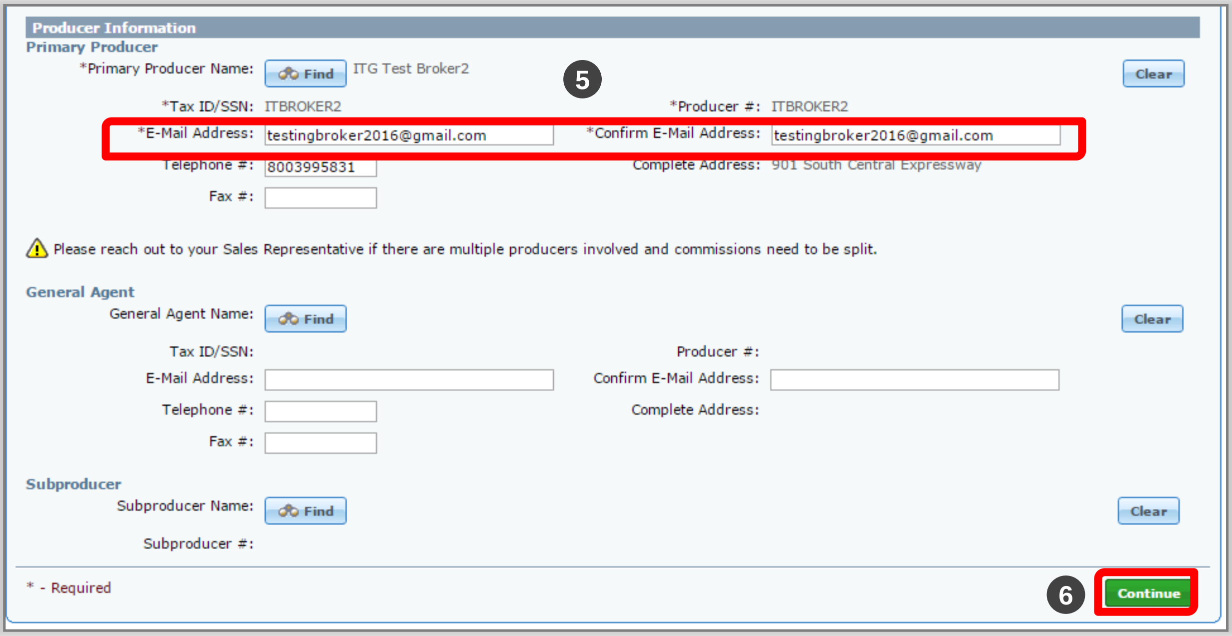
2 How to Enroll a Small Group (Contd.)

I. Account Information (contd.)



5. In the **Producer Information** section, 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: “*The email addresses do not match*”. Enter the email address. Renter the email address to validate it.
6. Once all required fields are complete, click the green **Continue** button to save and move to the next screen. Once saved, the data entered will populate the fields in the header.

Note: Ensure that the email address is accurate. All the notifications and communications regarding your case will be sent to this email address. During the Underwriter Review, in case the Underwriter needs more information or any additional information, then all relevant emails will be sent to this email address.

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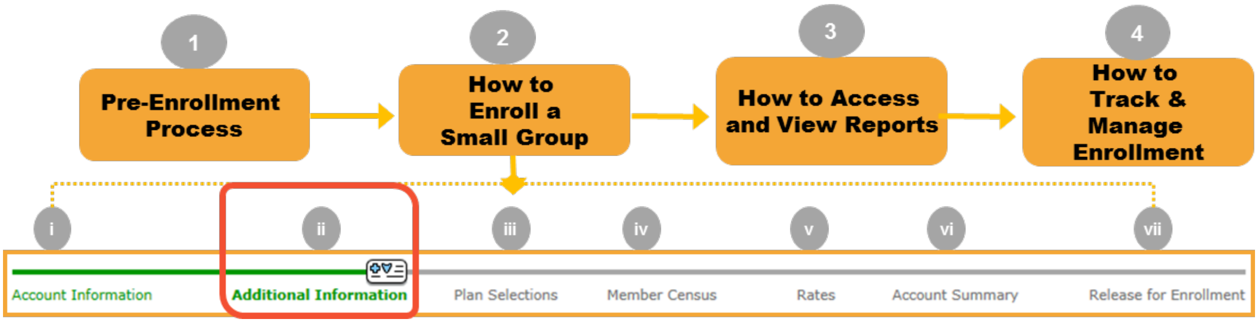
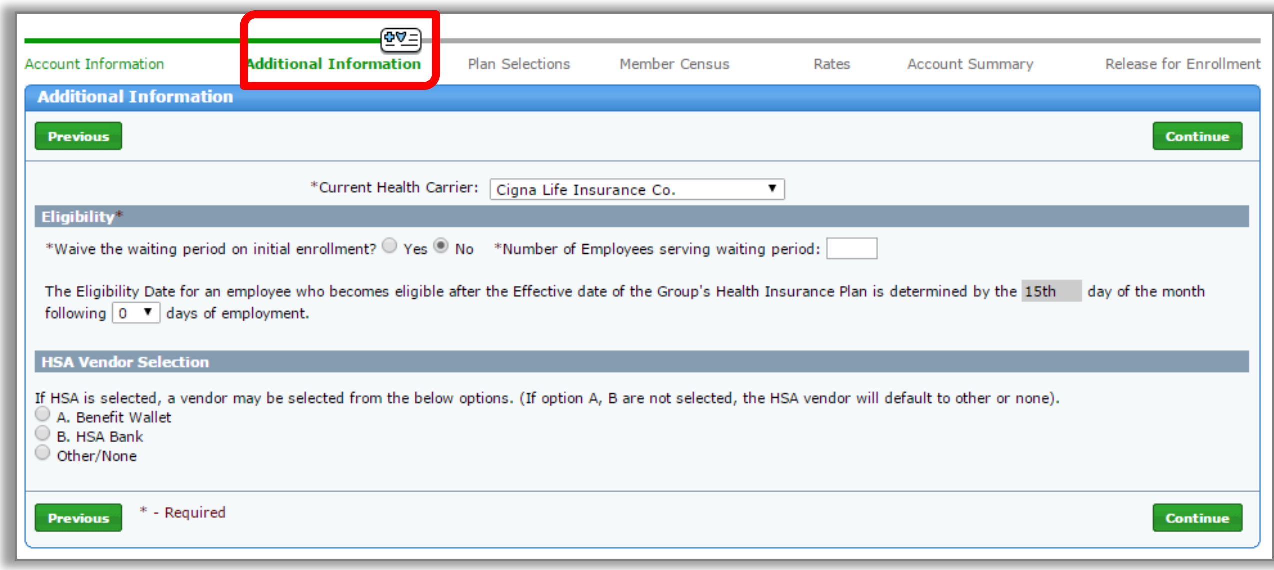
2 How to Enroll a Small Group (Contd.)

II. Additional Information



In the earlier step, you have entered the required account information for your group. Next you will enter additional group level information.



Step ii: Additional Information

1. Enter the group level information in the required fields using the documentation provided. All fields marked with an asterisk (*) are required. Use **Previous** and **Continue** to move backward and forward in the tool. Depending on your selection **Yes or No**, different additional fields will be displayed.

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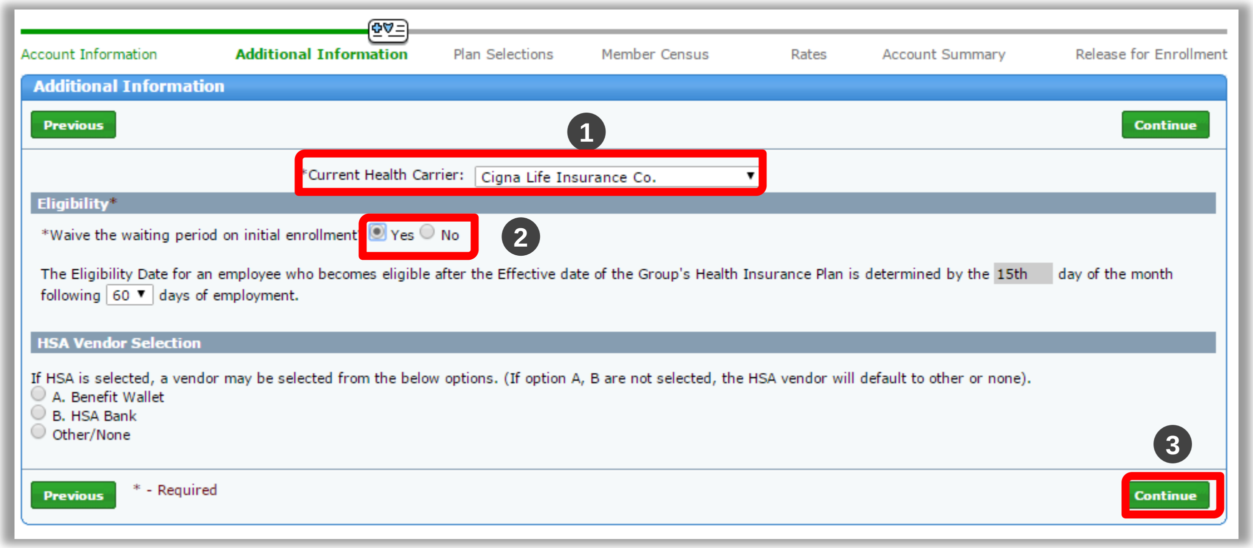
2 How to Enroll a Small Group (Contd.)

II. Additional Information (contd.)

1. On the **Additional Information** screen, select the relevant Health Carrier.



2. Under the Eligibility section, if the **No** radio button is selected, additional fields will be displayed. In this example, we select **Yes**.

Note: Under the **Eligibility** section, you can enter the number from “1-60" for employees who have become eligible after the **Effective Date** of the their health plan.

Under the HSA Vendor selection section, if a HSA is selected on the paperwork, a vendor may be selected here from the available options.

3. Click **Continue** to proceed to the **Plan Selections** screen.

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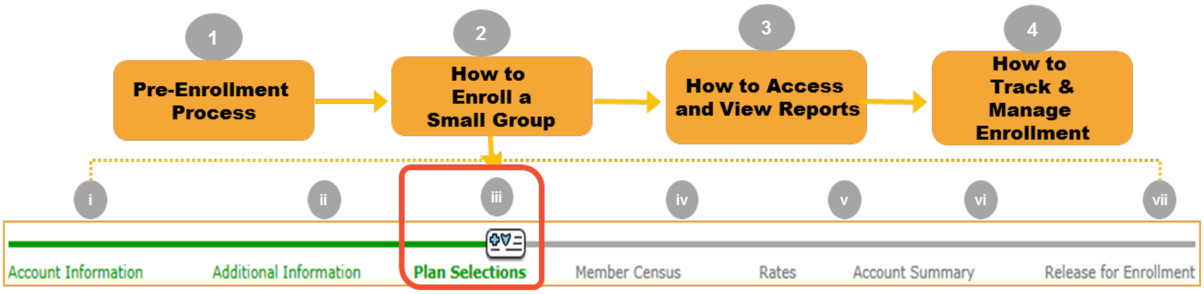
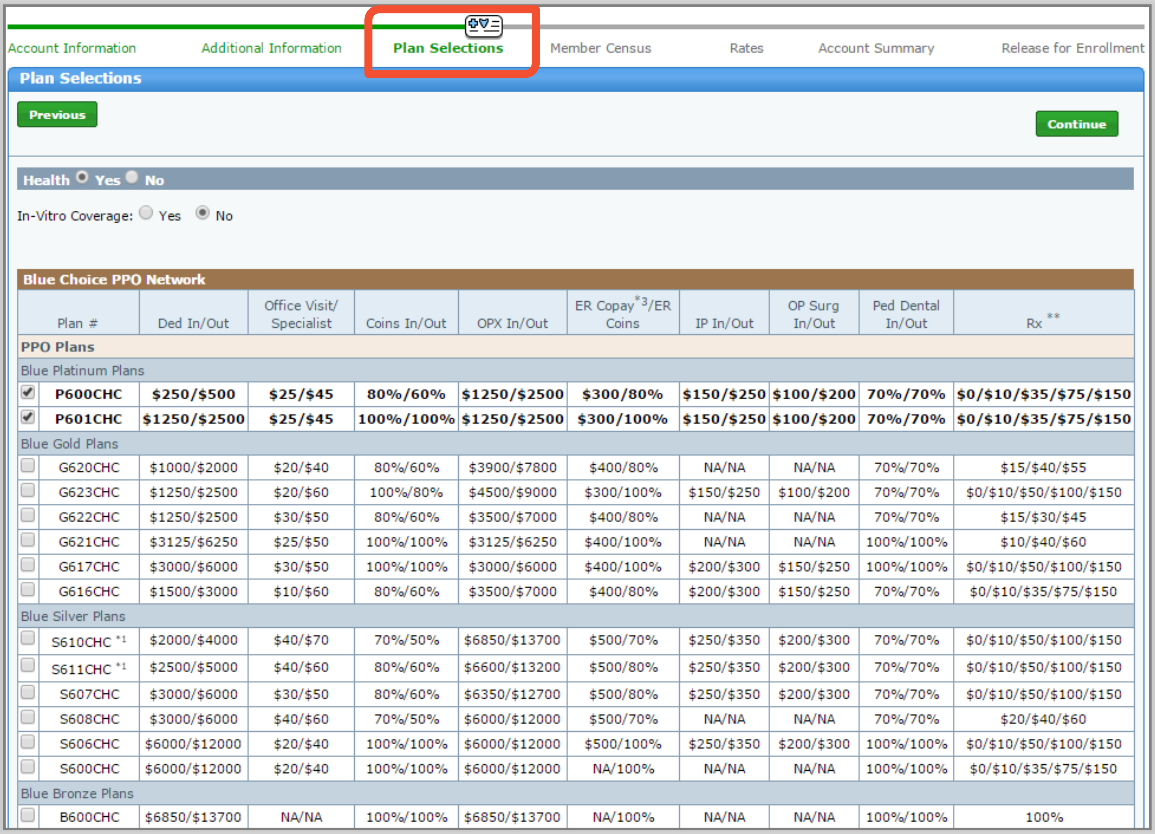
2 How to Enroll a Small Group (Contd.)

III. Plan Selections



Step iii: Plan Selections: Now that you've entered additional information, you can select the appropriate medical, dental and life plans for your group using the documentation provided. All fields marked with an asterisk (*) are required.



Account Information | Additional Information | Plan Selections | Member Census | Rates | Account Summary | Release for Enrollment

Plan Selections

Previous | Continue

Health Yes No

In-Vitro Coverage: Yes No

Blue Choice PPO Network

	Plan #	Ded In/Out	Office Visit/ Specialist	Coins In/Out	OPX In/Out	ER Copay *3/ER Coins	IP In/Out	OP Surg In/Out	Ped Dental In/Out	Rx **
PPO Plans										
Blue Platinum Plans										
☑	**P600CHC**	**$250/$500**	**$25/$45**	**80%/60%**	**$1250/$2500**	**$300/80%**	**$150/$250**	**$100/$200**	**70%/70%**	**$0/$10/$35/$75/$150**
☑	**P601CHC**	**$1250/$2500**	**$25/$45**	**100%/100%**	**$1250/$2500**	**$300/100%**	**$150/$250**	**$100/$200**	**70%/70%**	**$0/$10/$35/$75/$150**
Blue Gold Plans										
☐	G620CHC	$1000/$2000	$20/$40	80%/60%	$3900/$7800	$400/80%	NA/NA	NA/NA	70%/70%	$15/$40/$55
☐	G623CHC	$1250/$2500	$20/$60	100%/80%	$4500/$9000	$300/100%	$150/$250	$100/$200	70%/70%	$0/$10/$50/$100/$150
☐	G622CHC	$1250/$2500	$30/$50	80%/60%	$3500/$7000	$400/80%	NA/NA	NA/NA	70%/70%	$15/$30/$45
☐	G621CHC	$3125/$6250	$25/$50	100%/100%	$3125/$6250	$400/100%	NA/NA	NA/NA	100%/100%	$10/$40/$60
☐	G617CHC	$3000/$6000	$30/$50	100%/100%	$3000/$6000	$400/100%	$200/$300	$150/$250	100%/100%	$0/$10/$50/$100/$150
☐	G616CHC	$1500/$3000	$10/$60	80%/60%	$3500/$7000	$400/80%	$200/$300	$150/$250	70%/70%	$0/$10/$35/$75/$150
Blue Silver Plans										
☐	S610CHC *1	$2000/$4000	$40/$70	70%/50%	$6850/$13700	$500/70%	$250/$350	$200/$300	70%/70%	$0/$10/$50/$100/$150
☐	S611CHC *1	$2500/$5000	$40/$60	80%/60%	$6600/$13200	$500/80%	$250/$350	$200/$300	70%/70%	$0/$10/$50/$100/$150
☐	S607CHC	$3000/$6000	$30/$50	80%/60%	$6350/$12700	$500/80%	$250/$350	$200/$300	70%/70%	$0/$10/$50/$100/$150
☐	S608CHC	$3000/$6000	$40/$60	70%/50%	$6000/$12000	$500/70%	NA/NA	NA/NA	70%/70%	$20/$40/$60
☐	S606CHC	$6000/$12000	$20/$40	100%/100%	$6000/$12000	$500/100%	$250/$350	$200/$300	100%/100%	$0/$10/$50/$100/$150
☐	S600CHC	$6000/$12000	$20/$40	100%/100%	$6000/$12000	NA/100%	NA/NA	NA/NA	100%/100%	$0/$10/$35/$75/$150
Blue Bronze Plans										
☐	B600CHC	$6850/$13700	NA/NA	100%/100%	$6850/$13700	NA/100%	NA/NA	NA/NA	100%/100%	100%

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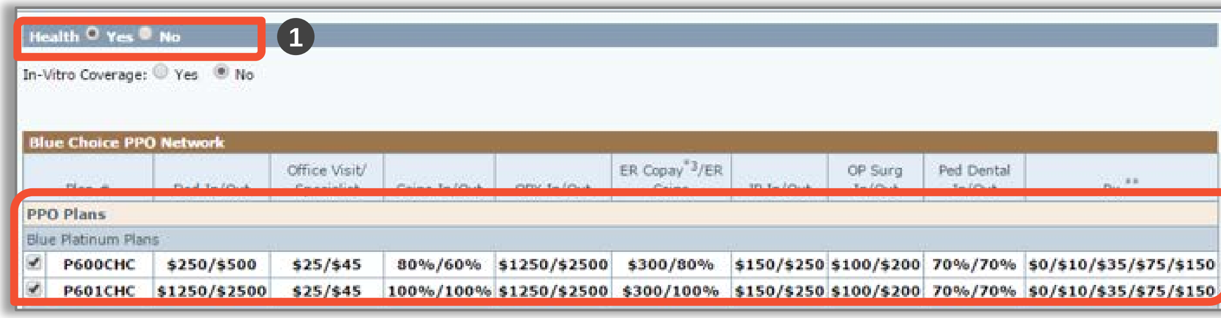
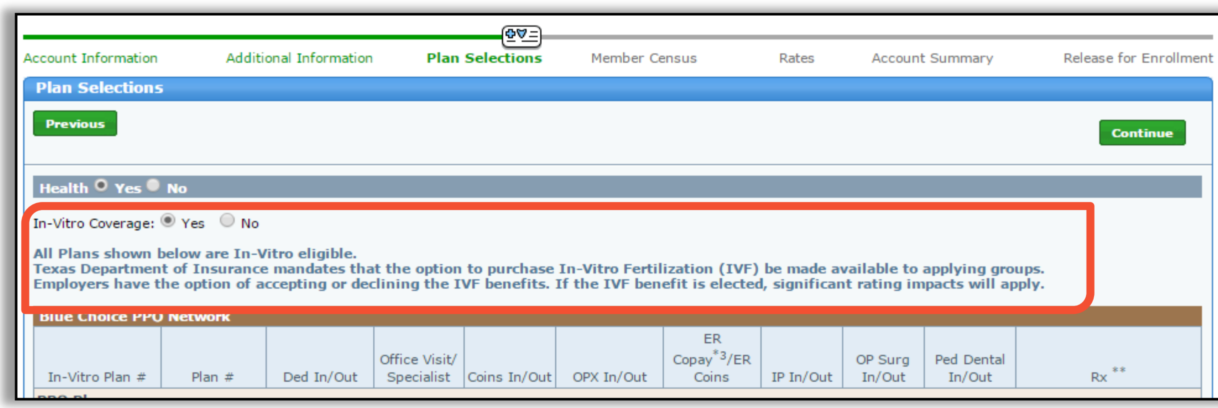
2 How to Enroll a Small Group (Contd.)

III. Plan Selections (contd.)

1. On the **Plan Selections** screen, for Health, the **Yes** option will default. If the group has not elected a health plan (i.e. Dental or Life only plans), you must manually select **No**. In this example, we keep the default selection of **Yes** and select the health plans.



2. The **No** option will default for In-Vitro Coverage. If In-Vitro is covered, you must manually select **Yes**. If you select **Yes**, you can compare the with In-Vitro and without In-Vitro plans and make an informed decision. In this example, we select **No**.



Important! *Selecting In-Vitro Coverage will significantly increase rates and change the plans.*

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2 How to Enroll a Small Group (Contd.)

III. Plan Selections (contd.)

* Ancillary Products - Dental ○ Yes ● No 3

If Dental is purchased, select from the following Dental plans.

Plan #	Plan Type	Deductible In/Out *2	Annual Benefit Max	Out-of-Network Reimb.	Coinsurance In Network	Coinsurance Out Of Network	Orthodontia Lifetime Max
True Group							
High Allocation							
DTXHR01	**Passive**	**$25/$25**	**$3000**	**90th R&C**	**100%/80%/50%/50%**	**100%/80%/50%/50%**	**$2000**
DTXHR02	Passive	$50/$50	$2000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$2000
DTXHR03	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1500
DTXHR04	Passive	$50/$50	$1000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1000
DTXHM09 *1	Passive	$50/$50	$1500	MAC	100%/80%/50%/NA	100%/80%/50%/NA	NA
DTXHM11 *3	Passive	$25/$25	$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
Low Allocation							
DTXLR05	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
DTXLR06	Passive	$50/$50	$1000	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
DTXLR07	Passive	$75/$75	$1000	90th R&C	90%/70%/50%/NA	90%/70%/50%/NA	NA
DTXLM08	Passive	$50/$50	$1500	MAC	100%/80%/50%/50%	100%/80%/50%/50%	$1000
DTXLM10 *1	Passive	$75/$75	$1000	MAC	90%/70%/50%/NA	90%/70%/50%/NA	NA
Voluntary Group							
High Allocation							
DTXHR12 *1	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1500
DTXHM13 *1	Passive	$50/$50	$1500	MAC	100%/80%/50%/NA	100%/80%/50%/NA	NA
DTXHM15 *3	Passive	$25/$25	$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
Low Allocation							
DTXLM14 *1	Passive	$75/$75	$1000	MAC	90%/70%/50%/NA	90%/70%/50%/NA	NA

3. The Ancillary Products- Dental radio button will default to **No**. In this example, we select **Yes** and select the relevant dental plans.

Attention

The number of plans selected exceeds the maximum selection allowed (6 plans).

You can only select a specified number of medical, dental or life plans. You will receive the attention message above if the number of plans you select exceeds that number.

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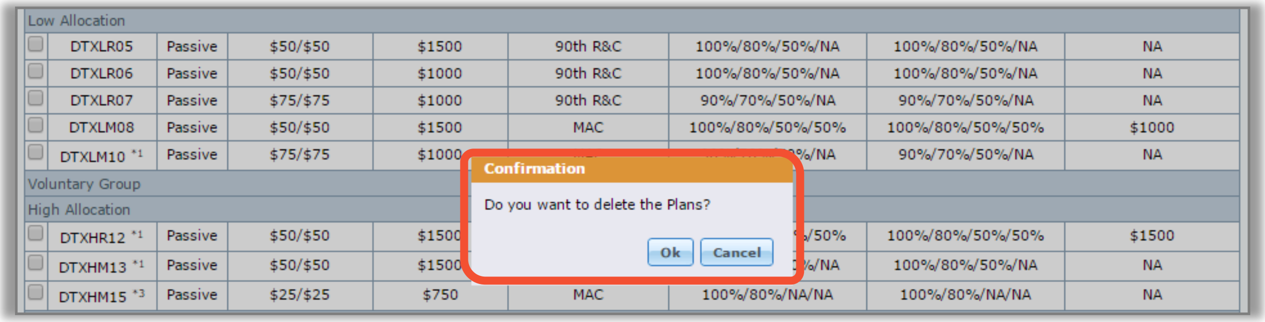
2 How to Enroll a Small Group (Contd.)

III. Plan Selections (contd.)



For any of the plans, if you have selected the **Yes** radio button and then change your selection to No, you see a confirmation pop-up asking **Do you want to delete the plans?** Click **OK** if no products are wanted in this category. This action does not remove any benefits, it only collapses the section.

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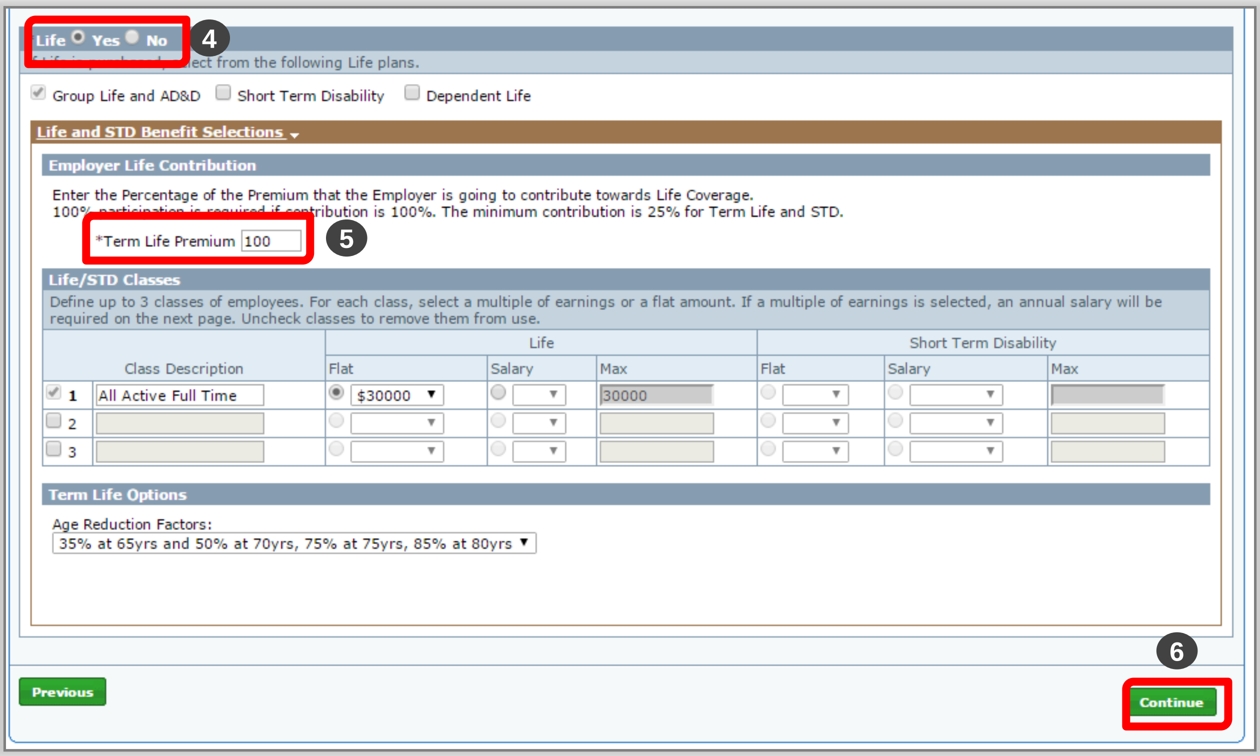
2 How to Enroll a Small Group (Contd.)

III. Plan Selections (contd.)



4. The Life radio button will default to **No**. When the **Yes** radio button is selected, the Life plan options will populate. In this example, we select **Yes**. Click the **'Life and STD Benefit Selections'** link to populate the additional required fields. Only those fields applicable to the selected ancillary products will populate. Now, the Life Selection option will default to 0-9 employees.
5. Enter the Term Life Premium amount. In this example, it is $100.
6. Click **Continue** to proceed to the **Member Census** screen.

> ***IMPORTANT! You must enter the percentage of the premium that the employer is going to contribute towards Life Coverage.*** When Life is selected, the Salary Period will default to Annual. On Member Census page, the Salary field minimum value is $10,000.00.

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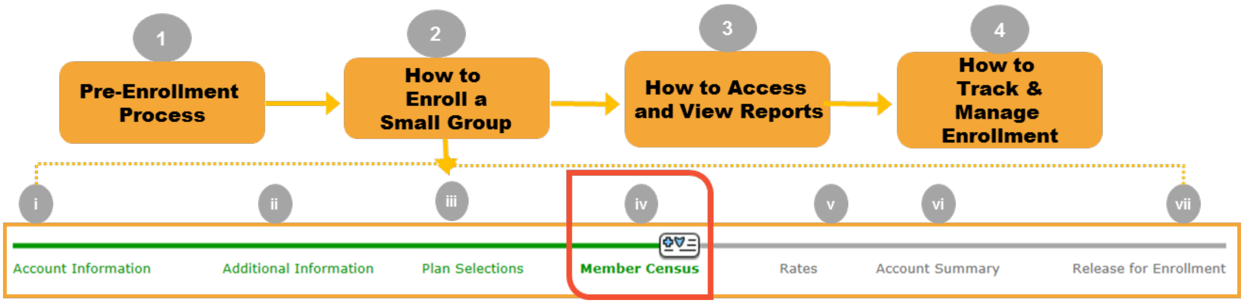
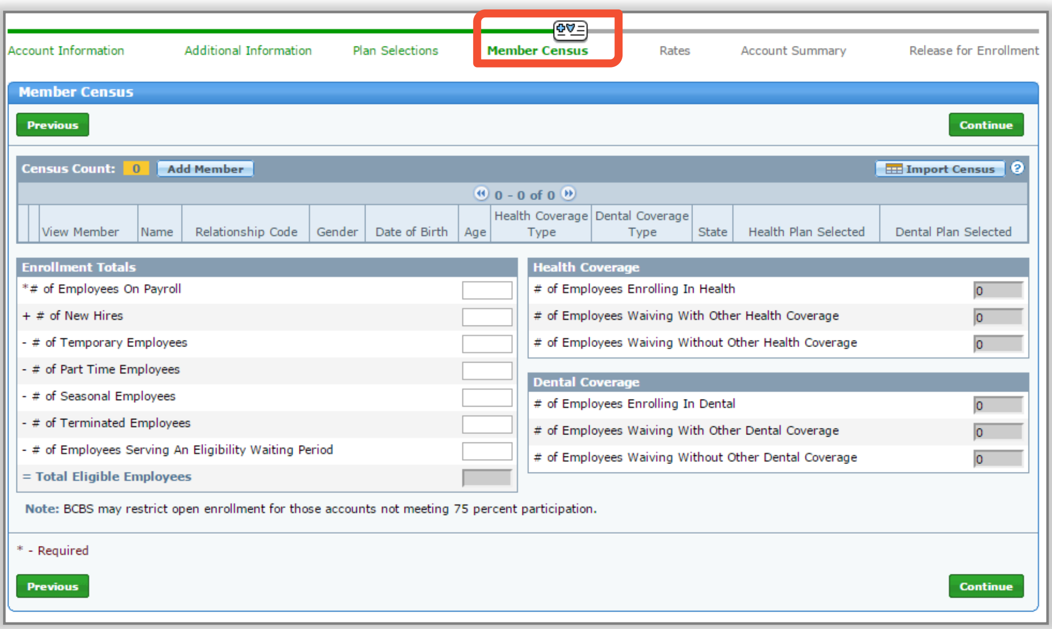
2 How to Enroll a Small Group (Contd.)

IV. Member Census



Step iv: Member Census:

You have entered the appropriate plans for your group. Next, you will enter the Member Census either manually or via a file import method using the provided documentation.



***IMPORTANT!** Information for all eligible employees waiving coverage must be included in order to calculate the participation percentage.*

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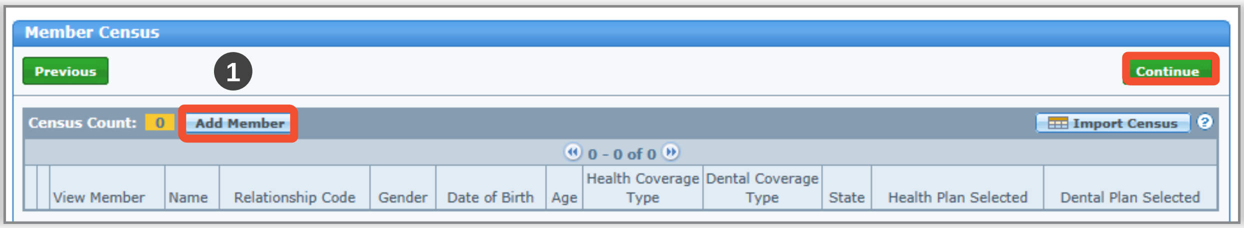
2 How to Enroll a Small Group (Contd.)

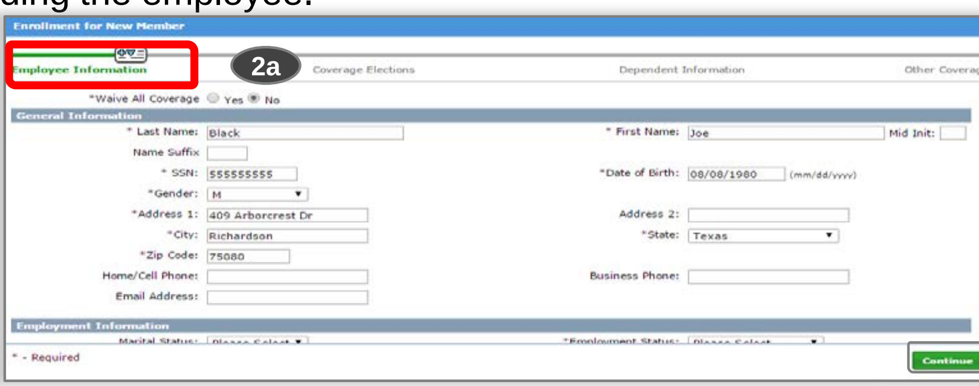
IV. Member Census

Manual Entry

The steps below will walk you through how to manually enter member census.



1. On the Member Census screen, click **Add Member** to manually add the Member Census information.
2. Click **Continue** to go through the Employee Information, Coverage Elections, Dependent Information, Other Coverage, and Employee Application Complete Screens. As members are added, the census count will auto-populate the appropriate number of rows. Let's begin with the Employee Information screen.
    - **2a: Employee Information:** General census information regarding the employee.



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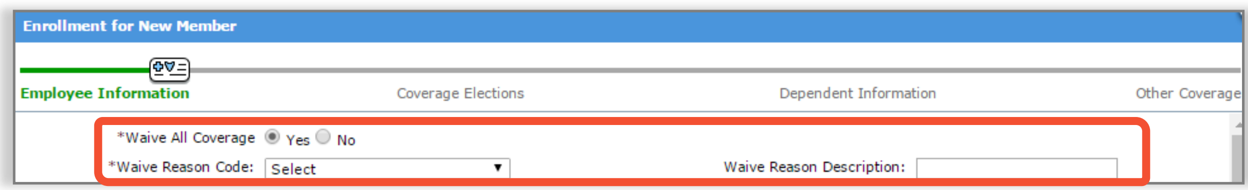
2 How to Enroll a Small Group (Contd.)

IV. Member Census (contd.)

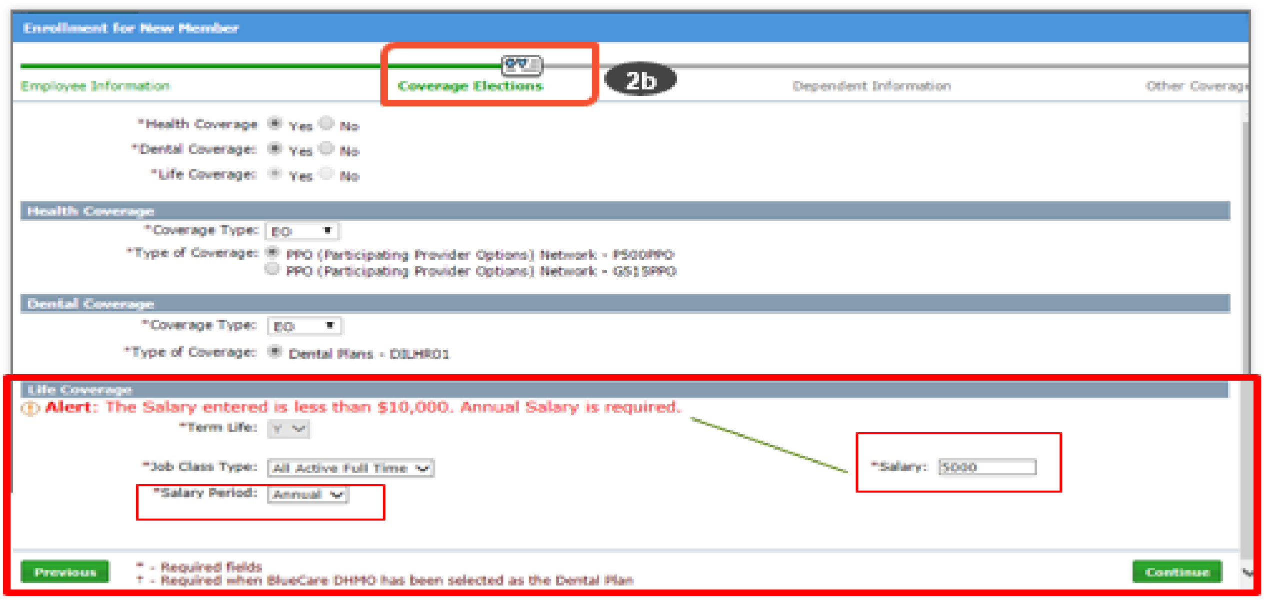
Manual Entry (contd.)

Step 2 continued: Add Member: Enrollment for New Member

- **Employee Information:** The Waiver information is also included in this section. You will have minimal data entry if a member waives all coverage. You are required to select the Waive Reason Code and Name.



- **2b: Coverage Elections**: Enter Health, Dental and Life product option selection at the member level.. When Life selected, the Salary Period will default to Annual. Salary minimum required is 10,000.00.



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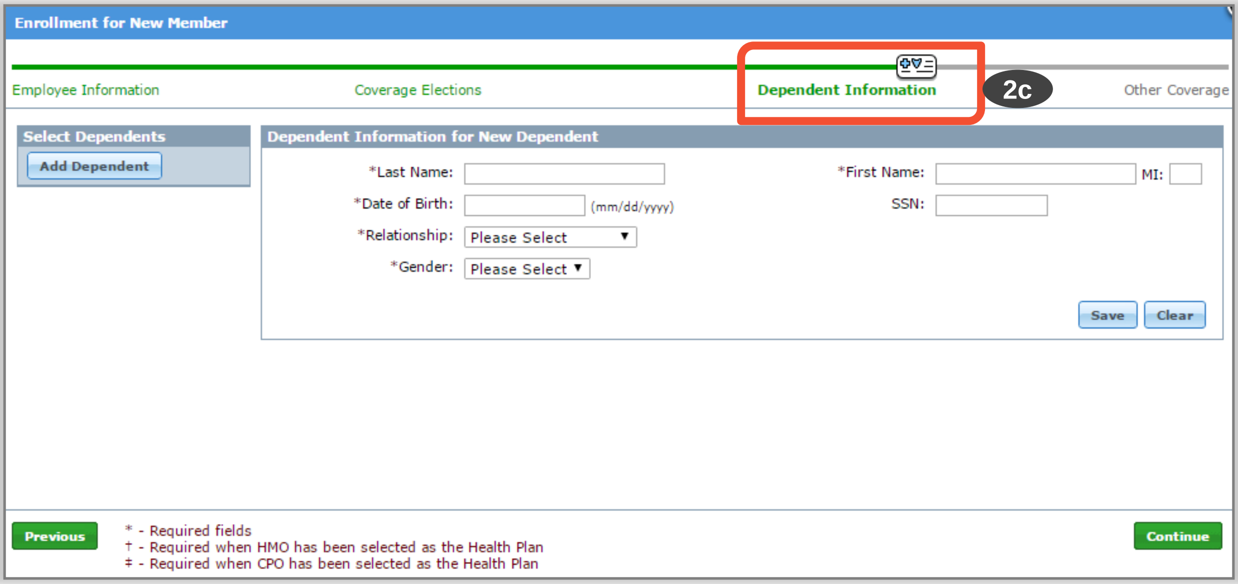
2 How to Enroll a Small Group (Contd.)

IV. Member Census (contd.)

Manual Entry (contd.)

Step 2 continued: Add Member: Enrollment for New Member

- **2c: Dependent Information**: General census information regarding covered dependents is entered here. If Dependents are covered, click **Add Dependent** and the applicable fields will populate.



Enter the dependent information click **Save** and then click **Continue**.

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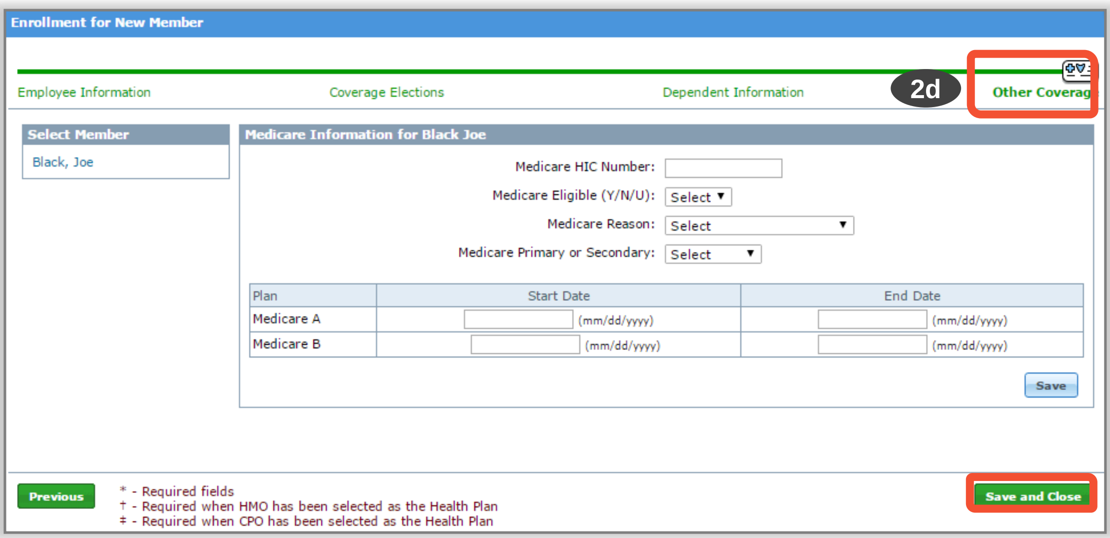
2 How to Enroll a Small Group (Contd.)

IV. Member Census (contd.)

Manual Entry (contd.)

Step 2 continued: Add Member: Enrollment for New Member

- **2d: Other Coverage:** Any applicable Medicare information for both the employee and dependent are entered here. When the name is selected, additional Medicare information fields will populate. Enter the information and then click **Save** and **Close.**



Note: When HMO coverage is elected, additional fields will become visible to enter the Medical Group and PCP information. If no Medical Group IPA # is entered **597** will default. If the medical group defaults to **597**, the member will not receive or be able to print an ID card and may have difficulty accessing benefits until a medical group is selected. Please be sure to inform the member.

***IMPORTANT!** PCP and Medical Group information is required. Users may select the Provider Help link to access the provider finder portal.*

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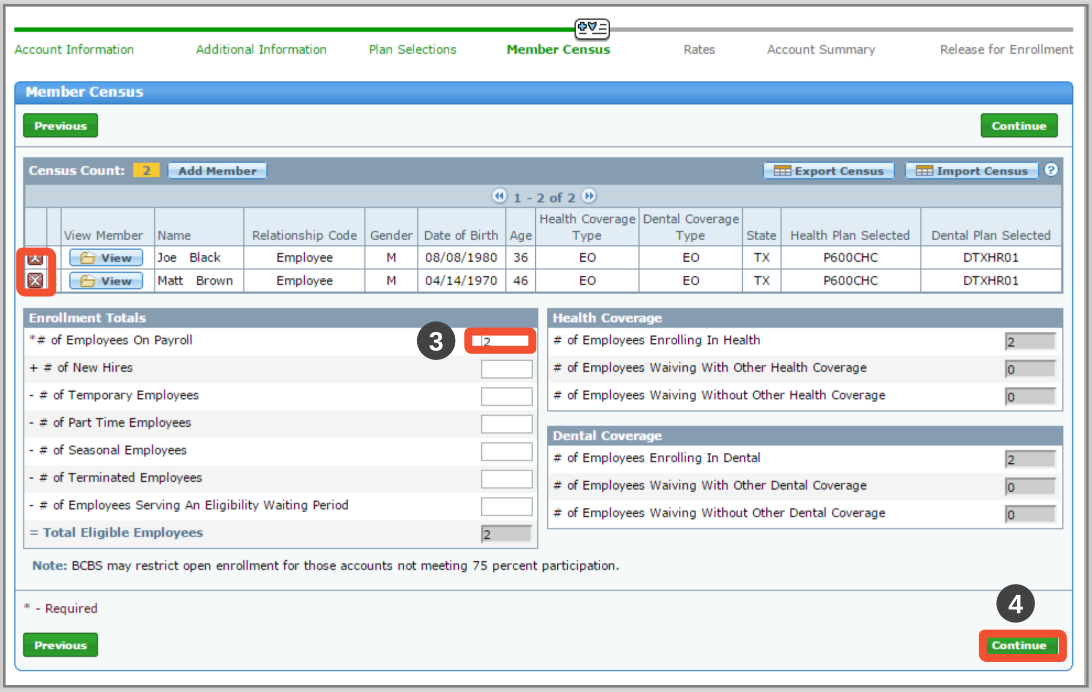
2 How to Enroll a Small Group (Contd.)

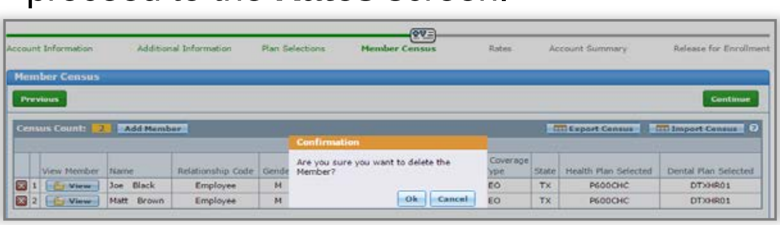
IV. Member Census (contd.)

Manual Entry (contd.)



Step iv: Member Census continued.

3. In this example, we have added two members. Next, enter the total # of Employees on Payroll. This is a required field. The fields which follow must also be completed if applicable. The census totals for health and dental coverage will default based on the census information entered.
4. After manually entering the information, you can click **Continue** to proceed to the **Rates** screen.



Note: Members can be deleted by clicking the red 'x' next to their name.

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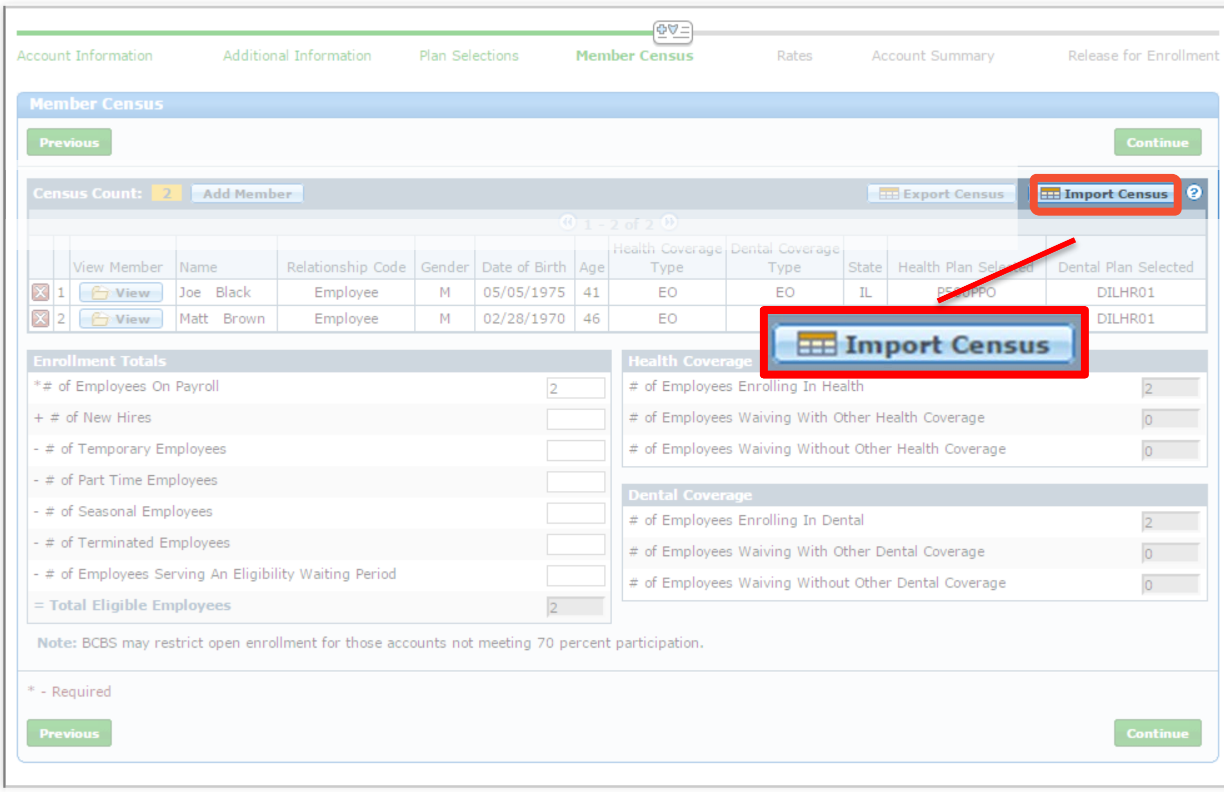


HOW TO ENROLL A SMALL GROUP (CONTD.)

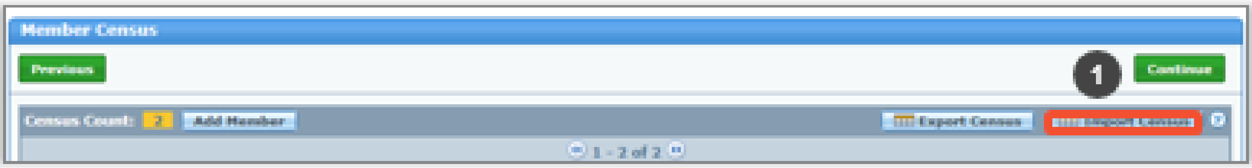
IV. MEMBER CENSUS (CONTD.)

Import Census

2 How to Enroll a Small Group (Contd.)

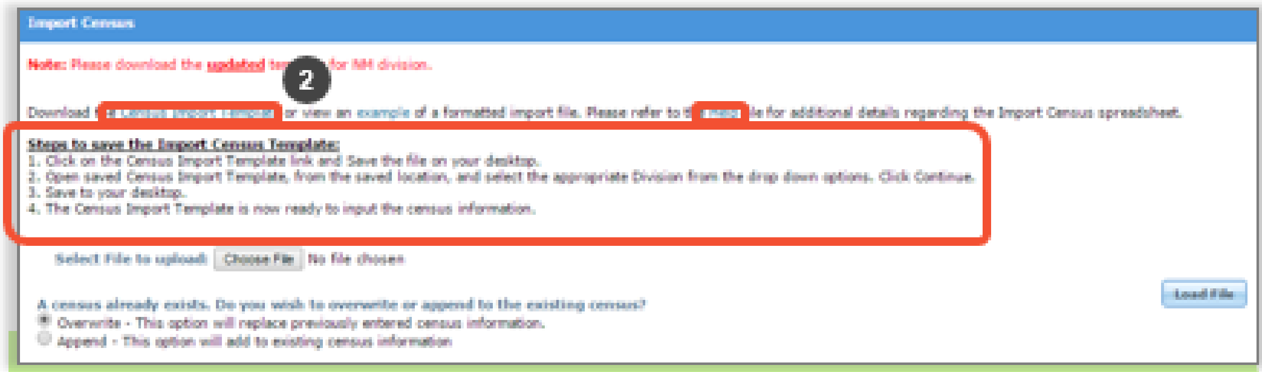
IV. Member Census (contd.)

Import Census



Step iv: Member Census (Import Census)

1. To use the Import Census option, click **Import Census**.
2. If you don't have the latest template, click the **Census Import Template** link. Save the file on your local drive.



Note:

- The **Import Census** pop-up window includes a separate link for the **Help** file, which includes separate tabs for each division in the spreadsheet.
- Steps to properly download and save the import file.
- Clear definitions for **Overwrite** and **Append import** file function.
- *Please Note: A new version of the Census Import Template for Enrollment (CITE) will be available in BAP in October, 2017. Please download the new version to your local/network drive.*

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2 How to Enroll a Small Group (Contd.)

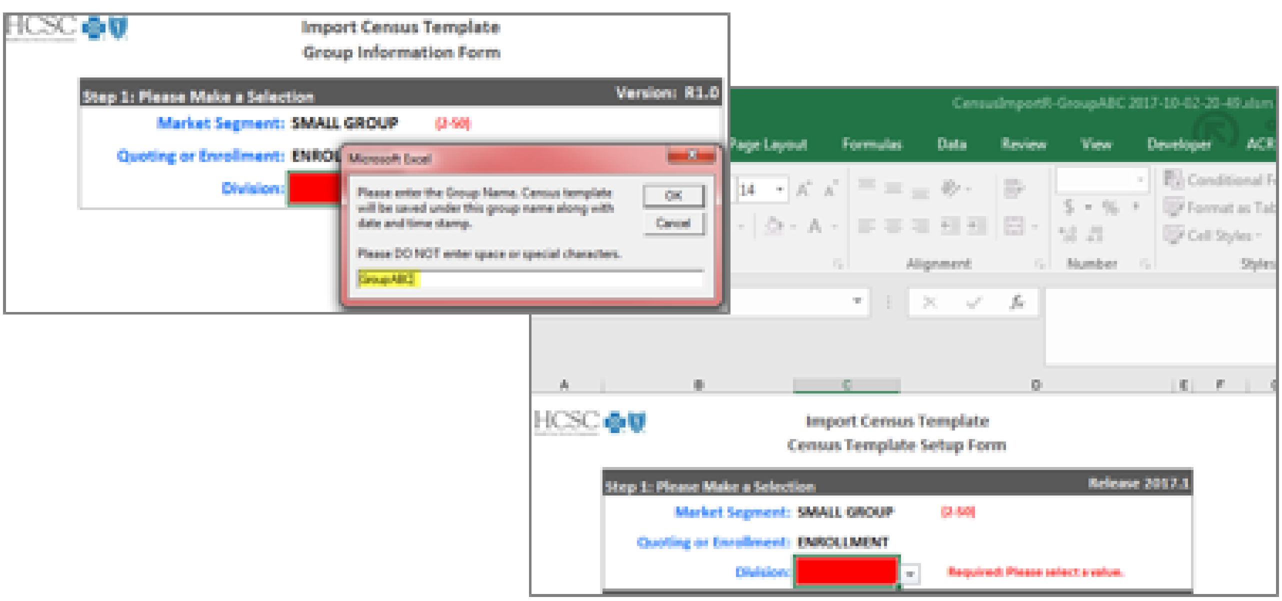
IV. Member Census (contd.)

Import Census (contd.)

Step iv: Member Census (Import Census)

Steps for entering a Group's Census using import census template:

1) Open *CITE* and save under the Group's Name.
2) Complete Census Template Setup form.
3) Enter data in Import Census Template tab.
4) Click File Save to validate data.
5) An Error List will be generated. Correct errors and click File Save to re-validate data.
6) Upon successful validation, upload *CITE* into ACA Small Group Enrollment Tool.



For more information, please refer to ACA Small Group Enrollment Import Census Template Reference Guide Release 2017.1.

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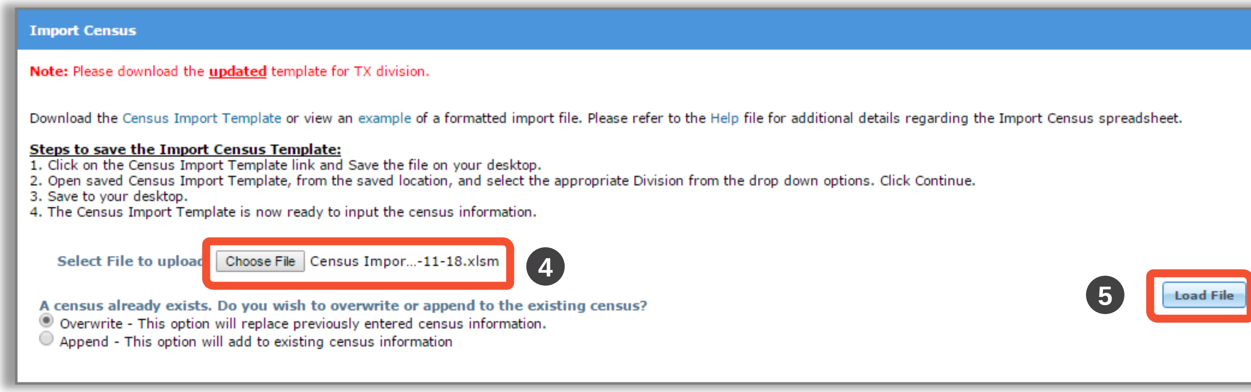
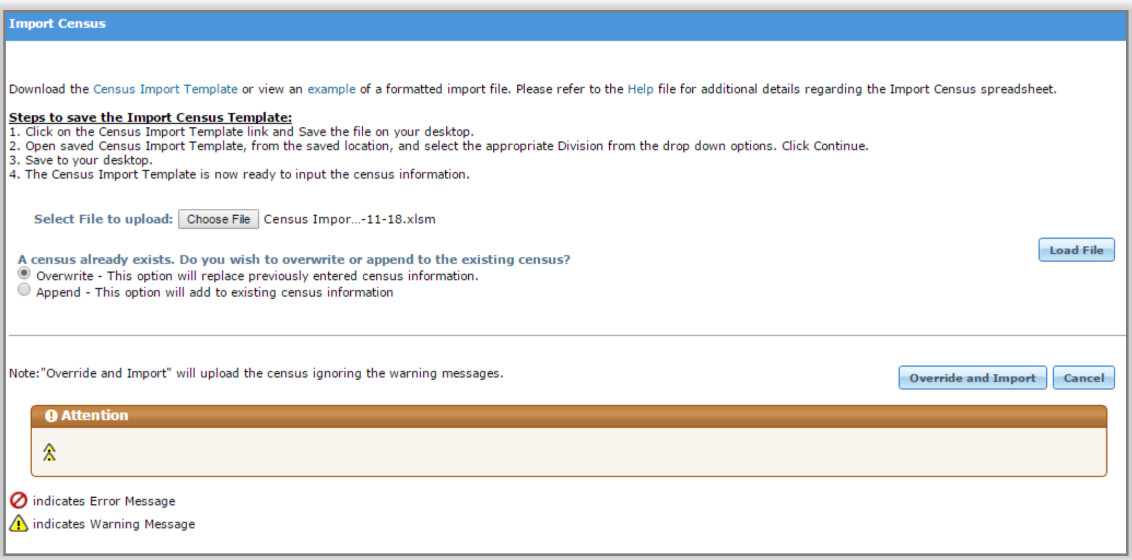
2 How to Enroll a Small Group (Contd.)

IV. Member Census (contd.)

Import Census (contd.)



4. Click **Choose File** and select the appropriate file.
5. Click **Load File**.



Note: The Import Census pop-up will also include the following:

- A clarification for **Override** and **Import** upload option.
- A legend key for warning and error symbols

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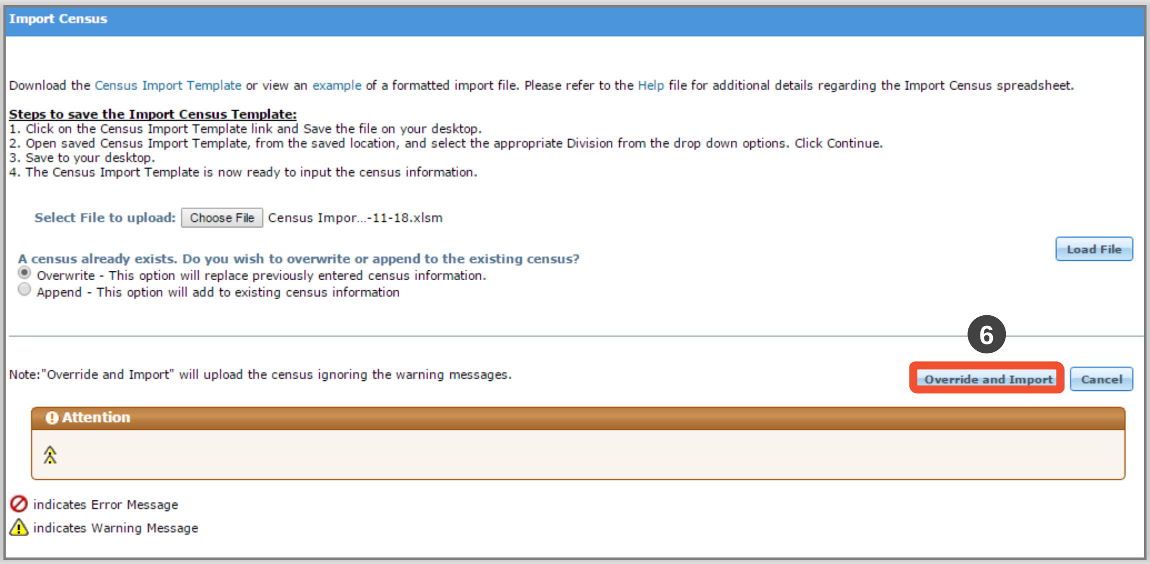
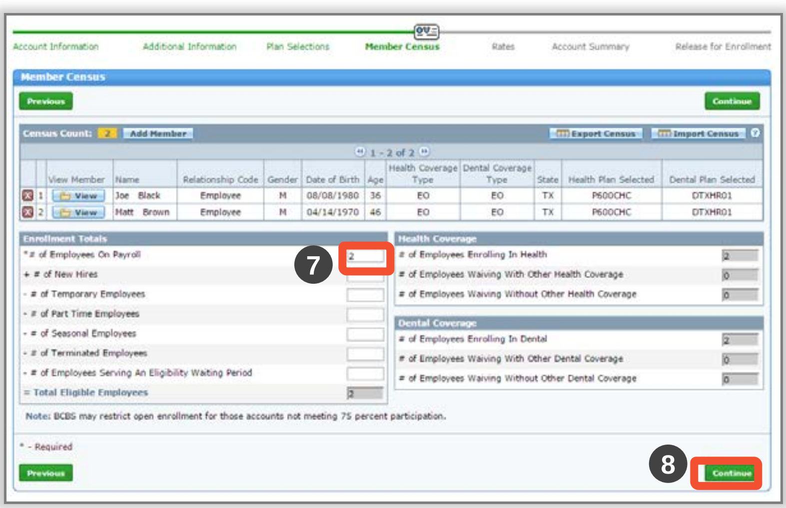
2 How to Enroll a Small Group (Contd.)

IV. Member Census (contd.)

Import Census (contd.)



6. Click **Override and Import**. The census information will automatically populate into the **Member Census** page.
7. Enter the total # of Employees on Payroll.
8. Click **Continue** to proceed to the **Rates** screen.



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2 How to Enroll a Small Group (Contd.)

IV. Member Census (contd.)

Import Census (contd.)

Helpful Tips

1) New census template will not work with Excel 2009 and older version. Please use the old import census template or enter census in ACA Enrollment Tool directly.
2) If macros are not enabled, you will need to click Enable Content button at the top or change your Excel Trust setting (Please refer to the training manual for instructions).
3) Each time you open CITE, you will be prompted to enter group name. This entry is used to save the file under that group's name along with date and time stamp. The original CITE file remains intact. For next group's census, open the original CITE file.
4) Entire cell will be highlighted in Red for required entry and if a value is invalid cells will be highlighted in Yellow.
5) If you are typing in data, value will be validated on Enter. A error message displays with Retry and Cancel button. Retry return you to the cell for edit and Cancel wipes out the typed value.
6) Before copying from an external source and pasting data onto CITE, please make sure the source format matches to the required format for the CITE census column.
7) Be sure to validate data once data entry is complete by clicking on File Save. A separate Error List tab will be generated. To fix the errors, you can toggle back and forth from Import Census tab and Error List tab.

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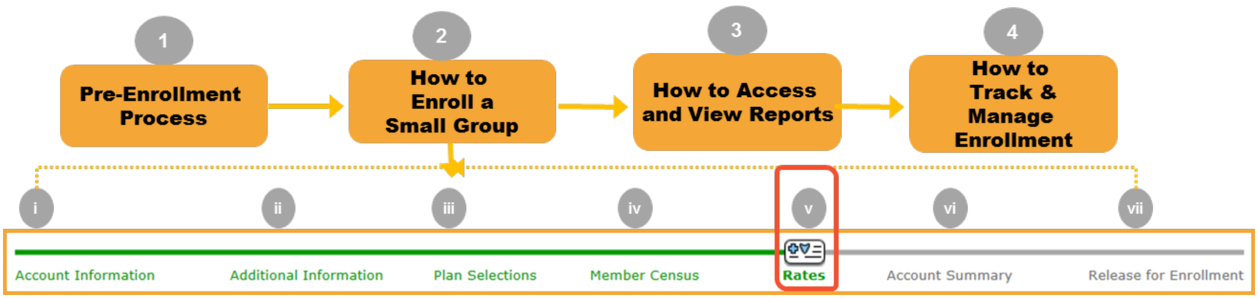
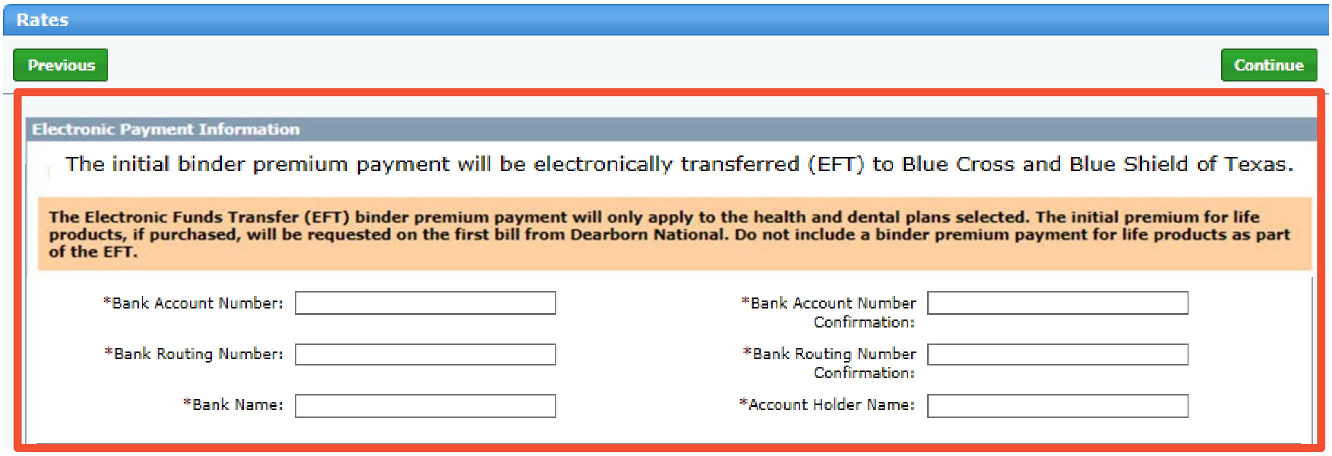
2 How to Enroll a Small Group (Contd.)

V. Rates



Step v: Rates
Electronic Funds Transfer (EFT) is required for Initial premium payment. **On the Rates screen, enter the payment information. Electronic Funds Transfer (EFT) is used to transfer the amount to Blue Cross and Blue Shield of TX".**


Rates

Previous

Continue

Electronic Payment Information

The initial binder premium payment will be electronically transferred (EFT) to Blue Cross and Blue Shield of Texas.

The Electronic Funds Transfer (EFT) binder premium payment will only apply to the health and dental plans selected. The initial premium for life products, if purchased, will be requested on the first bill from Dearborn National. Do not include a binder premium payment for life products as part of the EFT.

*Bank Account Number:

*Bank Account Number Confirmation:

*Bank Routing Number:

*Bank Routing Number Confirmation:

*Bank Name:

*Account Holder Name:

Note: The EFT draw will occur after the case is approved and the Welcome Letter becomes available. The EFT will usually happen within 24-48 hours of approval. Please notify the group of the expediency of this transaction.

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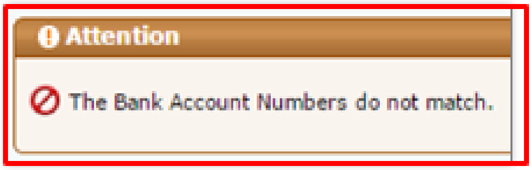
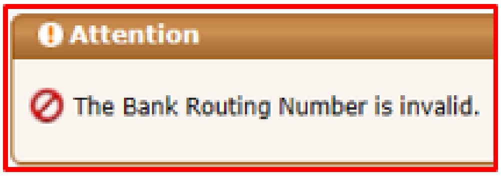
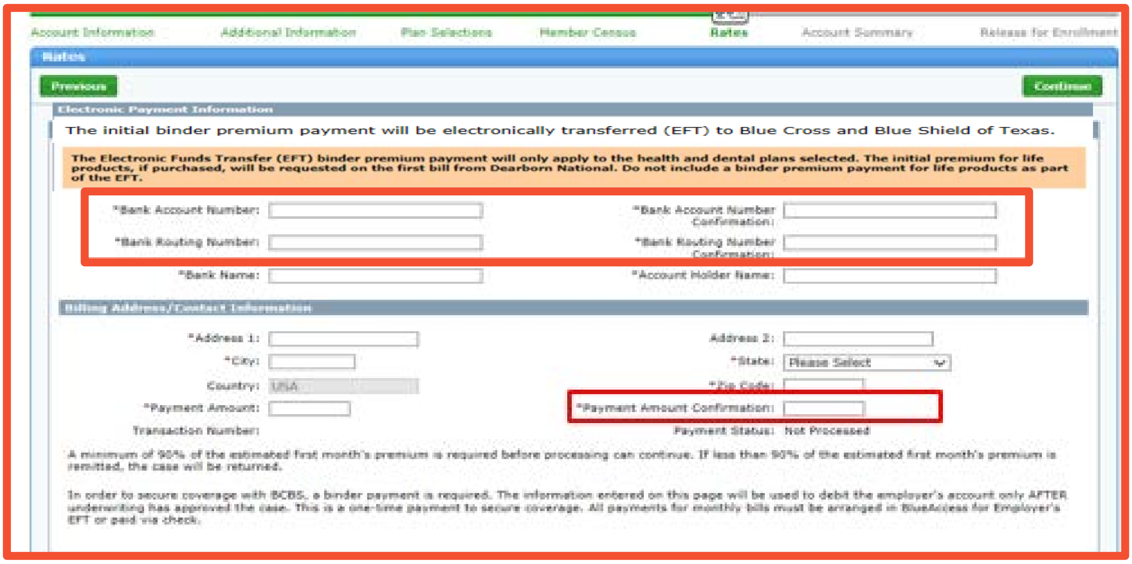
2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

1. You will need to complete the group's Bank Account Number and Bank Routing Number information. These are required fields. The Bank Routing Number will only accept numerical values and should be equal to 9 digits. The tool will confirm that these critical required fields are entered correctly. If there is a mismatch, an error message will be displayed:: "*The Bank Account Numbers do not match*." or
2. " The Bank Routing Number is invalid."







Note: The EFT binder premium payment will only apply to the health and dental plans selected. The initial premium for life products, if purchased, will be requested on the first bill from Dearborn National. Do not include a binder premium payment for life products as part of the EFT.

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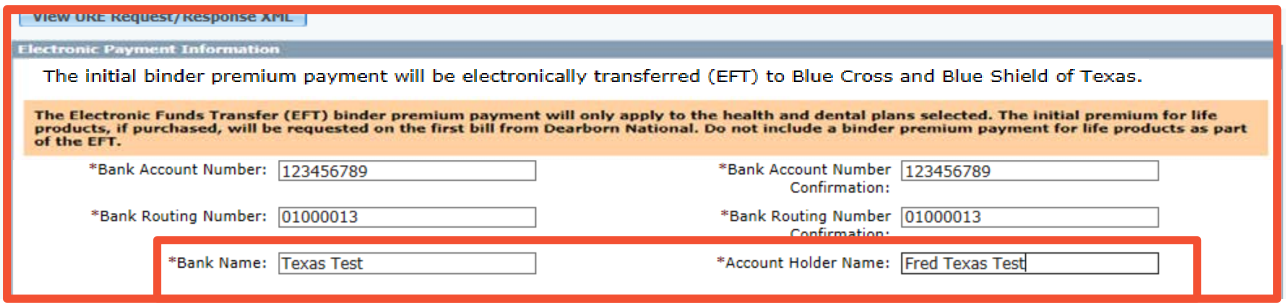
2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

2. Next, you are required to edit the Bank Name and populate the Account Holder Name which are also mandatory fields.



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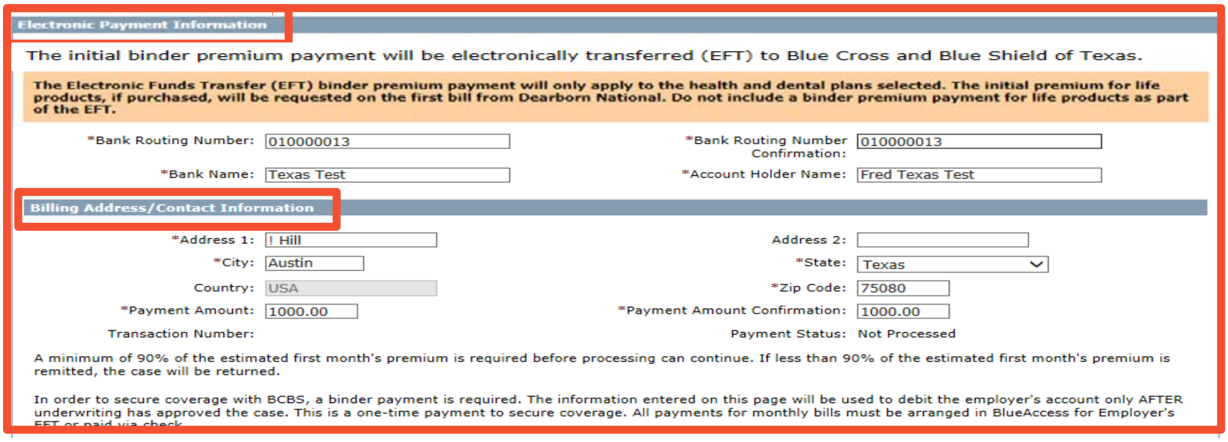
2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

3. The sub-section under Electronic Payment Information is the Billing Information. This section includes the following required fields: Address1, Address 2, City, State, Country, and Zip Code. Enter all the details in the required fields.



Let's discuss the **Billing Address/Contact Information** section. The Payment Amount is a required field and accepts value in dollars with decimal. For example: $1000.00. You can also view the following notification on the screen. The Payment Amount must be input a second time to verify accuracy. "*A minimum of 90% of the estimated first month's premium is required before processing can continue. If less than 90% of the estimated first month's premium is remitted, the case will be returned" message on the screen*.

Another required field is the **Transaction Number**. This field will remain blank before case is released for enrollment. This field will be populated once the Underwriting approves the case and the tool sends the payment details for processing.

Note: When filling in the billing address/ contact information, enter the address and contact details for the specific group.

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2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

The Payment Status field has the following statuses:

- **Not Processed**: Is displayed, until the payment is processed at the vendor and success/fail message is returned.
- **Success**: Is displayed once the EFT payment details are transferred to Alacrity.
- **Fail:** Is displayed only if the Bank Routing Number, entered into the system and transferred to our payment vendor, is not valid.

Transaction Number: Payment Status: Not Processed

A notification is displayed when you access this screen: *In order to secure coverage with BCBS, a binder payment is required. The information entered on this page will be used to debit the employer's account only AFTER underwriting has approved the case. This is a one-time payment to secure coverage. All payments for monthly bills must be arranged in Blue Access for Employer's EFT or paid via check.*

A minimum of 90% of the estimated first month's premium is required before processing can continue. If less than 90% of the estimated first month's premium is remitted, the case will be returned.

In order to secure coverage with BCBS, a binder payment is required. The information entered on this page will be used to debit the employer's account only AFTER underwriting has approved the case. This is a one-time payment to secure coverage. All payments for monthly bills must be arranged in BlueAccess for Employer's EFT or paid via check.

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2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

For unsuccessful Electronic Funds Transfer (EFT) payments, an automated email will be sent to the following recipients:
GA Cases
To:GA CC: N/A BCC: MktgTechEnrollment@bcbsil.com
NON-GA Cases
To: Broker CC: N/A BCC: MktgTechEnrollment@bcbsil.com

From: Blue Cross Blue Shield of Texas [mailto:none@bcbstx.com]
Sent: Wednesday, October 04, 2017 3:49 PM
To: Amy Stevens <Amy_Stevens@bcbsil.com>
Cc: Sucheta Mungale <Sucheta_Mungale@bcbstx.com>
Subject: AMY TX10.4 INT Account # 220035 - Unsuccessful Electronic Funds Transfer (EFT) Payment

Blue Cross and Blue Shield of Texas (BCBSTX) was unable to process the one time Electronic Funds Transfer (EFT) Payment for AMY TX10.4 INT Account # 220035.

When the EFT Payment is unsuccessful the initial premium payment will be due once the initial bill is received by the group.

For additional information regarding this transaction, please reference the log located in the ACA SG Enrollment Tool.

Please do not reply to this email. For questions, please contact the Service Center at 1-800-399-5831.

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2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

4. The Rating Model is displayed. You need to select the Rating Model either Member Level or 4-Tier Composite. In this example, we select **Member Level**. After making your selection, you can click **Print** to print the rates.

Rating Model

◉ Member Level ○ 4-Tier Composite 4

ATTENTION: There are two billing options to select from

1) Member level age rates OR
2) Composite rates.

Composite rates are calculated by aggregating the total premium across a four tier format. Important to note that billing changes are only allowed at policy anniversary date. Please carefully select the desired billing format for your enrolling client.

Member Level Rates

Employer Name: TEST_TX_UG **Plan:** P600CHC **Case ID:** 13466 Print

Effective Date: 10/15/2016 **Employer Zip Code:** 75080 **Employer County:** Dallas

Member Rates

Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*	Age	Total Monthly Health Cost*
<21	$311.40	28	$533.05	36	$603.18	44	$685.07	52	$957.24	60	$1,330.92
21	$490.39	29	$548.75	37	$607.10	45	$708.12	53	$1,000.39	61	$1,377.99
22	$490.39	30	$556.59	38	$611.03	46	$735.58	54	$1,046.98	62	$1,408.89
23	$490.39	31	$568.36	39	$618.87	47	$766.48	55	$1,093.57	63	$1,447.63
24	$490.39	32	$580.13	40	$626.72	48	$801.79	56	$1,144.08	64	$1,471.17
25	$492.35	33	$587.49	41	$638.49	49	$836.60	57	$1,195.08	65+	$1,471.17
26	$502.16	34	$595.33	42	$649.77	50	$875.84	58	$1,249.51		
27	$513.93	35	$599.26	43	$665.46	51	$914.58	59	$1,276.48		

* - Total Monthly Health Cost includes the effects of Health Insurer and Reinsurance Fees, plus any federal and state taxes applicable to these fees.

Census

	Name	Relationship Code	Date of Birth	Age	Coverage Type	State	Total Monthly Health Cost*
1	Joe Black	Employee	08/08/1980	36	EO	TX	$603.18
2	Matt Brown	Employee	04/14/1970	46	EO	TX	$735.58
						Total:	**$1,338.76**

* - Total Monthly Health Cost includes the effects of Health Insurer and Reinsurance Fees, plus any federal and state taxes applicable to these fees.
Estimated Health Insurer & Reinsurance Fees = **$36.00**

Print

ATTENTION: *There are two billing options to select from 1) Member level age rates OR 2) Composite rates. Select a rating model, and click the magnifying glass in the* ***Rates*** *column next to the product to view rates and Census information.*

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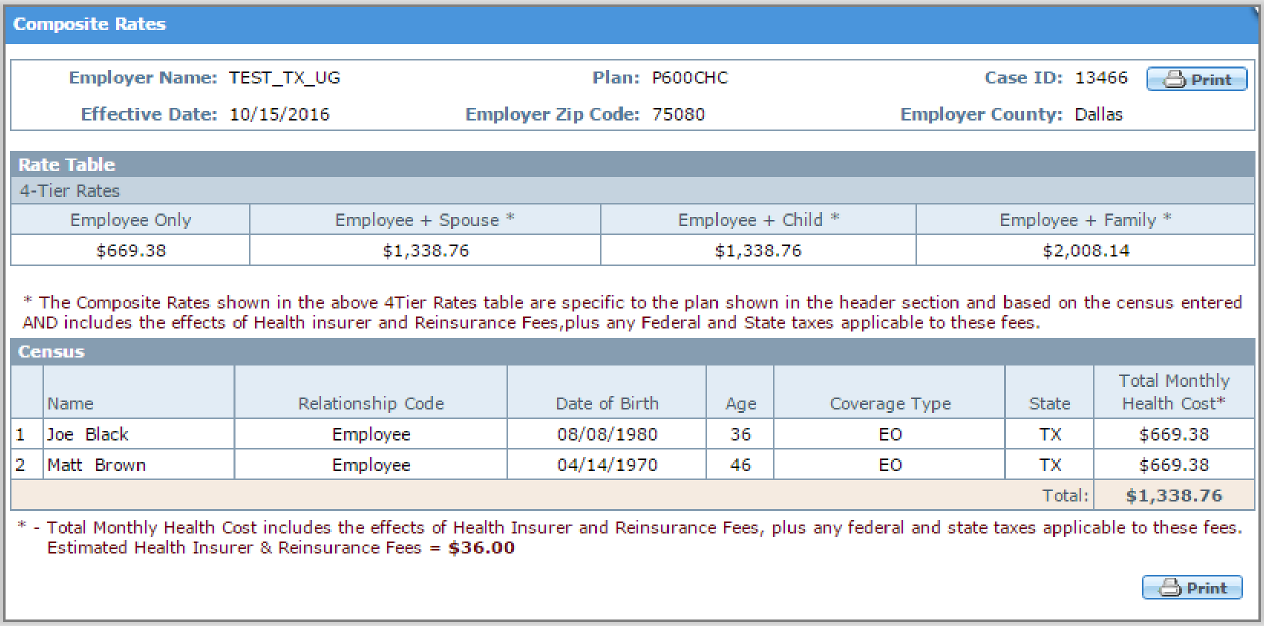
2 How to Enroll a Small Group (Contd.)

V. Rates (contd.)

Composite Rates Example



Composite Rates

Employer Name: TEST_TX_UG **Plan:** P600CHC **Case ID:** 13466 Print

Effective Date: 10/15/2016 **Employer Zip Code:** 75080 **Employer County:** Dallas

Rate Table

4-Tier Rates

Employee Only	Employee + Spouse *	Employee + Child *	Employee + Family *
$669.38	$1,338.76	$1,338.76	$2,008.14

* The Composite Rates shown in the above 4Tier Rates table are specific to the plan shown in the header section and based on the census entered AND includes the effects of Health insurer and Reinsurance Fees,plus any Federal and State taxes applicable to these fees.

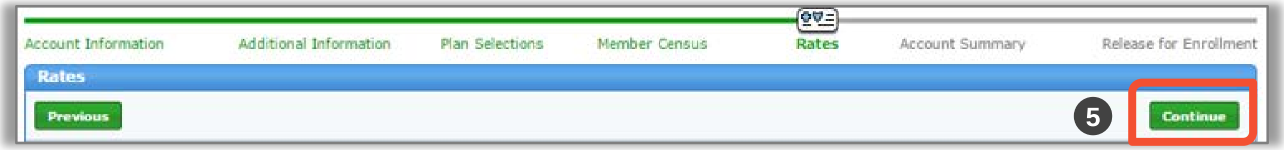
Census

	Name	Relationship Code	Date of Birth	Age	Coverage Type	State	Total Monthly Health Cost*
1	Joe Black	Employee	08/08/1980	36	EO	TX	$669.38
2	Matt Brown	Employee	04/14/1970	46	EO	TX	$669.38
						Total:	**$1,338.76**

* - Total Monthly Health Cost includes the effects of Health Insurer and Reinsurance Fees, plus any federal and state taxes applicable to these fees.
Estimated Health Insurer & Reinsurance Fees = **$36.00**

Print

Note: Composite rates are calculated by aggregating the total premium across a four tier format. Important to note that billing changes are only allowed at policy anniversary date. Please carefully select the desired billing format for your enrolling client.



5. Click **Continue** to proceed to the **Account Summary** screen.

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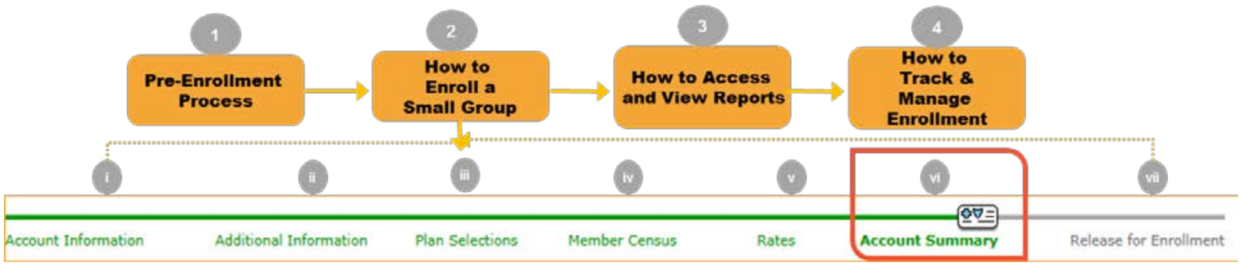
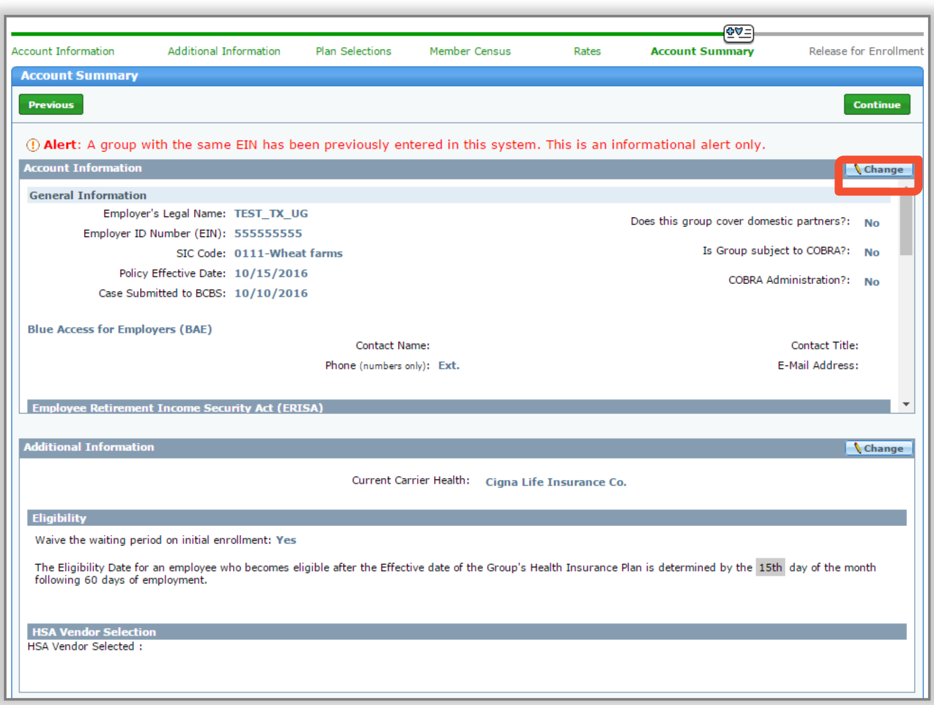
2 How to Enroll a Small Group (Contd.)

VI. Account Summary



Step vi: Account Summary:

The **Account Summary** screen allows you to review all of the input data by section. Review the information you have entered and revise if needed. Separate panels with scroll bars display key information from previous screens. Click **Change** in each panel to view the relevant page if you want to make any edits. If changes are made, click **Continue** to go back to the **Account Summary** screen. This ensures that all edits have been saved and rates have been adjusted if necessary.



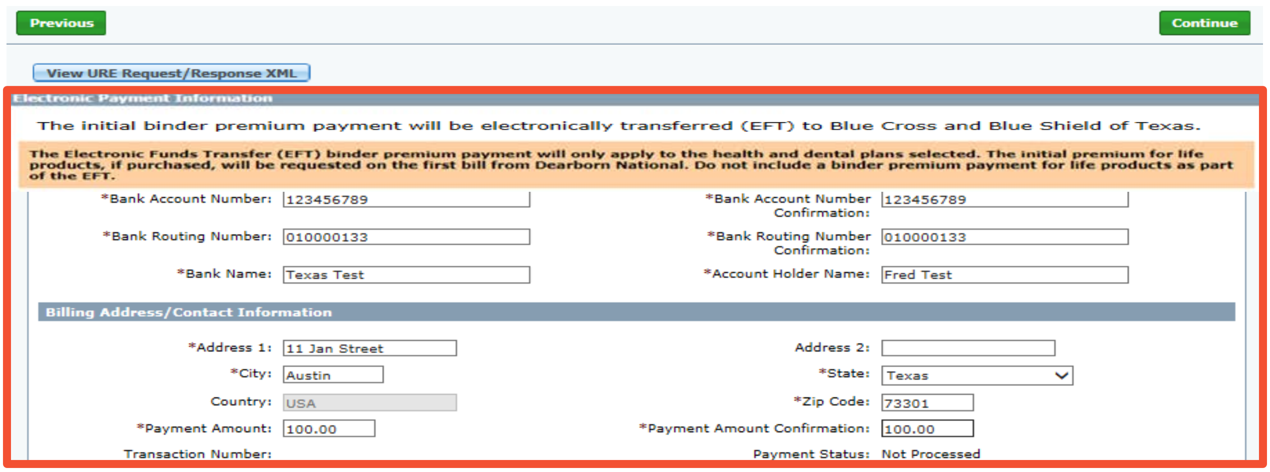
Return to Table of Contents

2 How to Enroll a Small Group (Contd.)

VI. Account Summary (contd.)

The **Electronic Payment Information** is now displayed under the **Plan Selections** and Header section. Under this section, all the data that was entered on the **Rates** screen will be displayed.

1. Click **Continue** to move to the **Release for Enrollment** screen.



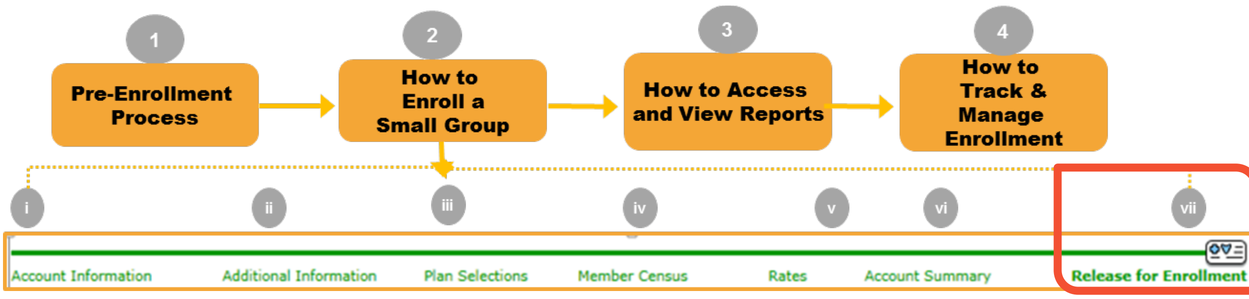
Note: You should be able to view the Electronic Funds Transfer (EFT) Payment Details document under the **Reports** tab on the **Account Summary** screen. You should also be able to view it irrespective of the status of the case.

You should be able to view the fields and their values in this document without been masked except for the Bank Account Number and the Bank Routing Number.

Return to Table of Contents

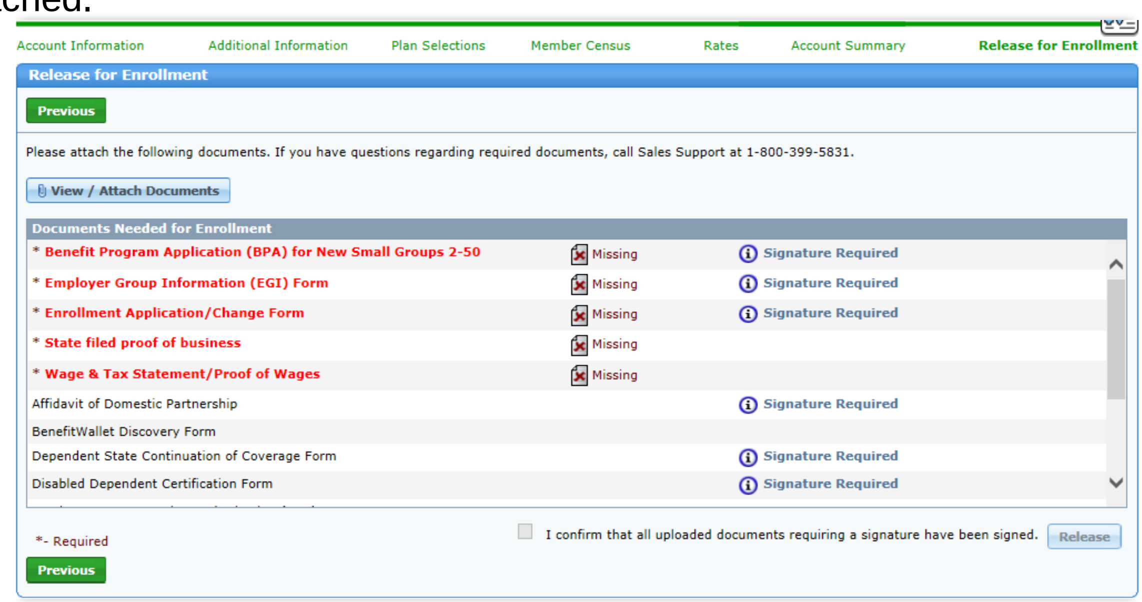
2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment



Step vii: Release for Enrollment

Based on the default required documents, under the **Documents Needed for Enrollment** section, the list will populate. Documents will be required based on the selections made during the data entry process. In order to release the case for enrollment successfully, these documents must be attached.



1. Click **View/Attach Documents**. This will populate a pop-up window, allowing the user to search system files to find the appropriate document.

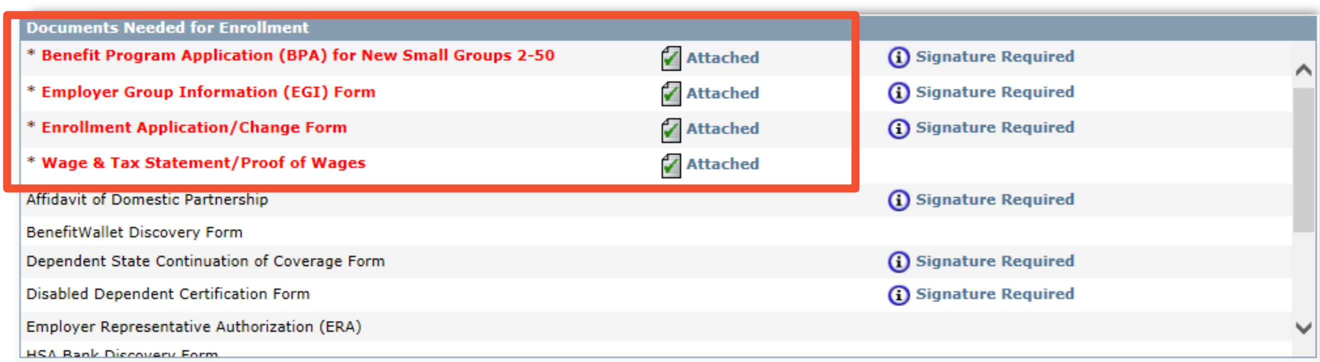
Return to Table of Contents

2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment (contd.)

Before proceeding to the next steps, let's discuss the **Documents Needed for Enrollment** section. This section easily identifies Required and Optional Documents. Required documents are identified by **bolded red font** and asterisks.

The "*Missing*" or "*Attached*" indicator will only appear for the required documents.



Documents Needed for Enrollment		
* **Benefit Program Application (BPA) for New Small Groups 2-50**	Attached	Signature Required
* **Employer Group Information (EGI) Form**	Attached	Signature Required
* **Enrollment Application/Change Form**	Attached	Signature Required
* **Wage & Tax Statement/Proof of Wages**	Attached	
Affidavit of Domestic Partnership		Signature Required
BenefitWallet Discovery Form		
Dependent State Continuation of Coverage Form		Signature Required
Disabled Dependent Certification Form		Signature Required
Employer Representative Authorization (ERA)		
HSA Bank Discovery Form		

Note: 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. This information will be captured on the new BPS.

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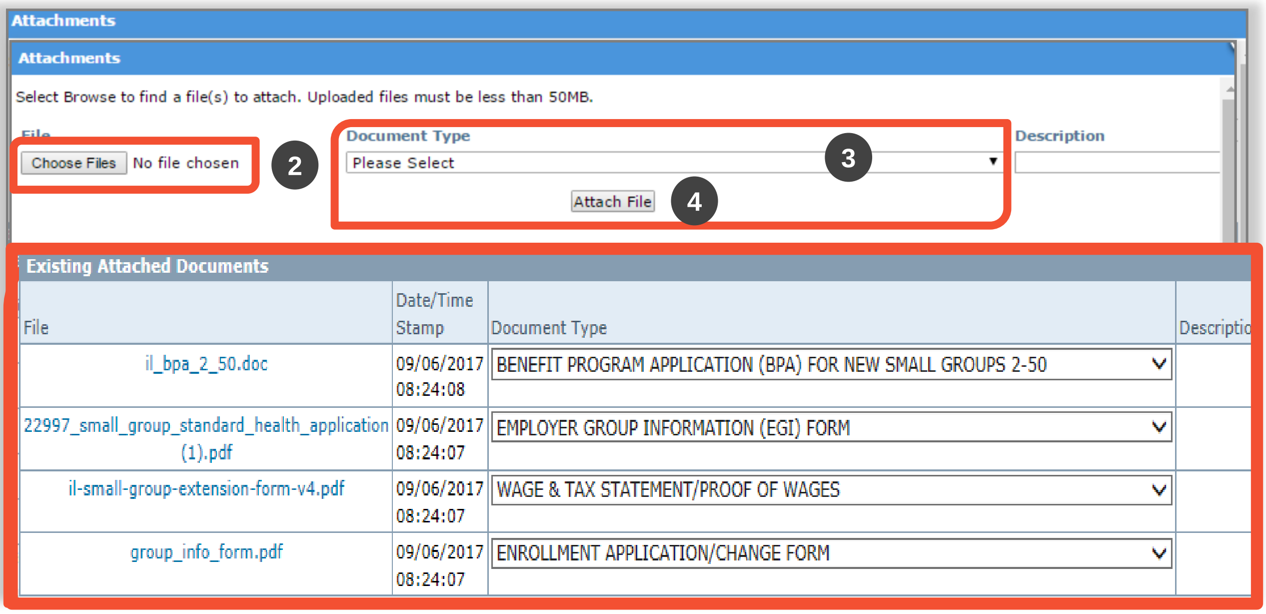
2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment (contd.)

2. Click **Browse** and locate
   the appropriate system folder and file.
3. Select the document type from the **Document Type** drop-down list.
4. Click **Attach File**. The document shows in the **Existing Attached Documents** section. If the wrong document has been attached, use **Delete Document** to remove the document.



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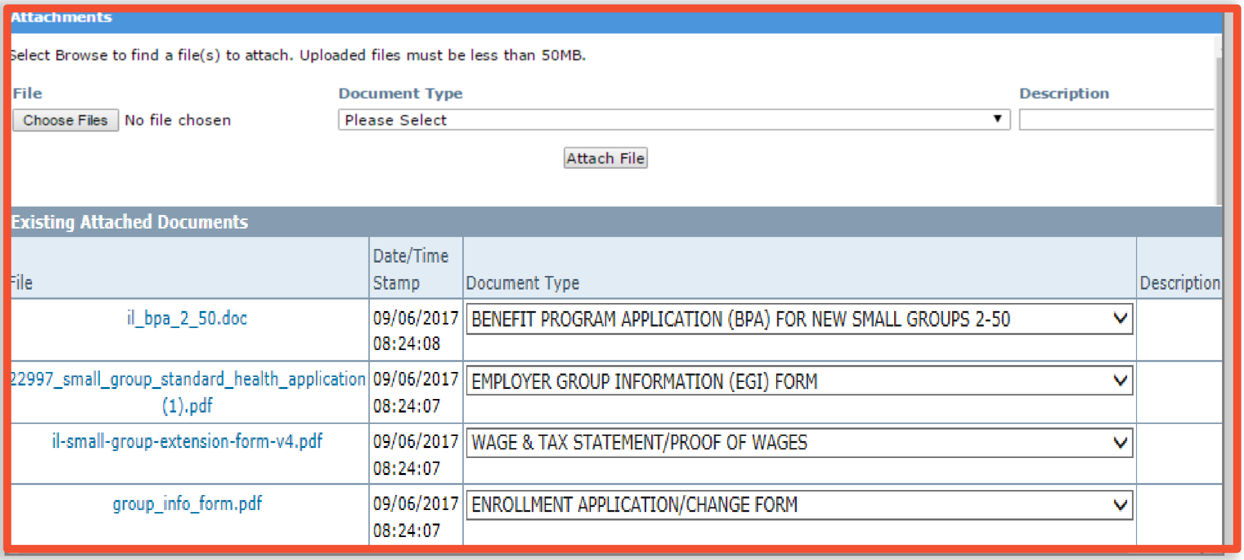
2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment (contd.)



You can also upload multiple documents, if required. When uploading multiple documents you can to assign multiple Document Types to the documents.

Important information about attaching multiple documents

- You must select one Document Type in order to attach the selected documents. This document type will be applied to all the attachments. Click **Attach**.
- Use the drop-down arrows next to the specific document to change the type
- After changing the necessary document types, click **Save** When done, click **X** to return to the **Release for Enrollment** screen.

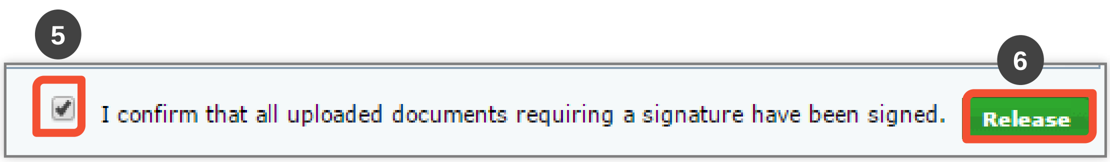
Note: The tool is compatible to support Zip files. A zip file may be uploaded and the applicable doc type selected. (i.e. employee applications) However, keep in mind that all required documents must be attached and document type selected, in order to release the group.

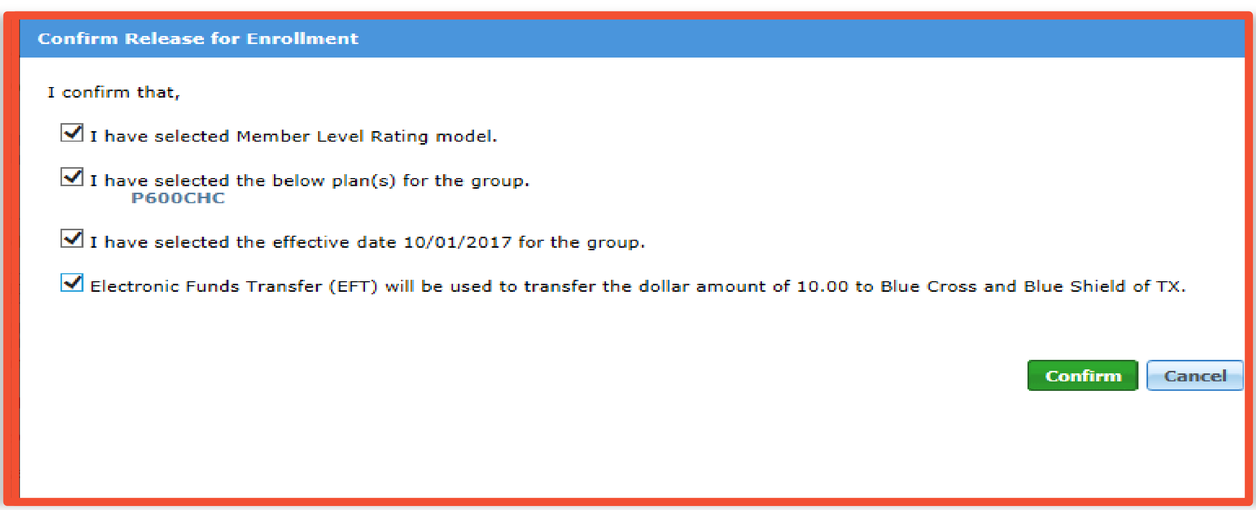
Return to Table of Contents

2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment (contd.)

5. Once you close the Attachments window, you are re-directed to the **Release for Enrollment** screen. Select the '***I confirm that all uploaded documents requiring a signature have been signed***' check box.
6. Click **Release** to release the group to Underwriting for review.
7. Confirm your selections. These include: Rating Model, Plans, Payment Method and payment amount, and the Effective Date for the group. Click **Confirm**.



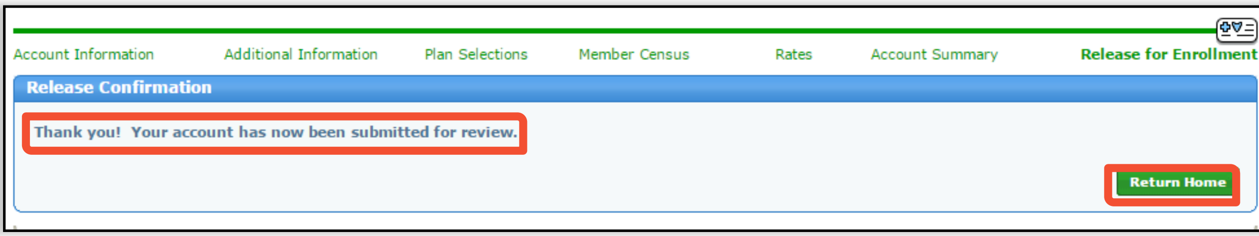


Return to Table of Contents

2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment (contd.)

After confirming, you receive a message saying **"Thank you! Your account has been submitted for review."** At this point you can click **Return Home** to return to the home page.



Once you click **Release**, the group is in a read-only status. No additional changes can be made until after the Underwriter has reviewed the case. If the Underwriter requires additional information, an email will be sent to the address entered in the Producer section during the enrollment process. The case will then be open to you to go back in to the tool and enter/upload missing information or documents. Please add, edit or attach the requested data, then return the case to BCBS. If you require changes, prior to review or approval, please contact your sales representative as soon as possible.

Note:
- You need to ensure that all information is correct before submitting to BCBS. The only way to correct information entered into the system is if the Underwriter returns the case to the user for **More Info Required** with the reason code of **Data Change Needed**. Once submitted, you cannot edit data.
- The EFT draw will occur after the case is approved and the Welcome Letter becomes available. The EFT will usually happen within 24-48 hours of approval. Please notify the group of the expediency of this transaction.

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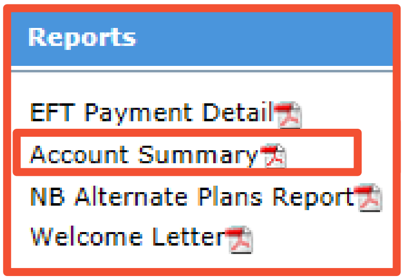
2 How to Enroll a Small Group (Contd.)

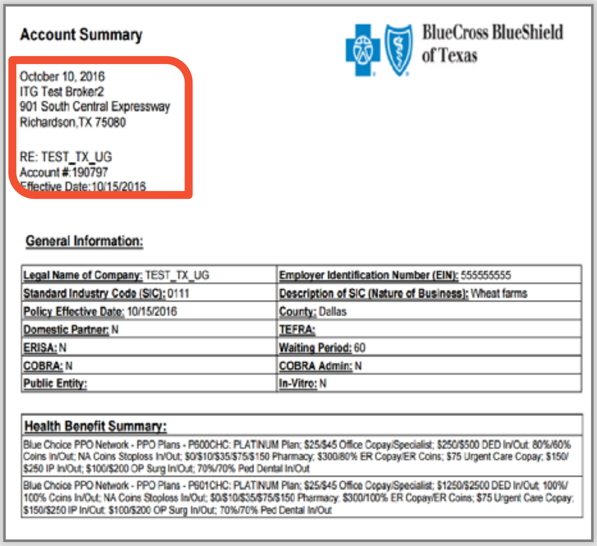
VI. Account Summary Report

Let's discuss the Account Summary Report.

Now, the **Account Summary Report** is available on the Release for Enrollment screen. Click **Reports** to view the report.



It is recommended that this document be reviewed and approved by the client for accuracy and to ensure that all plans, rates, and census information are accurate BEFORE the case is released. You can also view and print the report after the case has been approved.



Account Summary

BlueCross BlueShield of Texas

October 10, 2016
ITG Test Broker2
901 South Central Expressway
Richardson,TX 75080

RE: TEST_TX_UG
Account #:190797
Effective Date:10/15/2016

General Information:

Legal Name of Company: TEST_TX_UG	**Employer Identification Number (EIN):** 555555555
Standard Industry Code (SIC): 0111	**Description of SIC (Nature of Business):** Wheat farms
Policy Effective Date: 10/15/2016	**County:** Dallas
Domestic Partner: N	**TEFRA:**
ERISA: N	**Waiting Period:** 60
COBRA: N	**COBRA Admin:** N
Public Entity:	**In-Vitro:** N

Health Benefit Summary:
Blue Choice PPO Network - PPO Plans - P600CHC: PLATINUM Plan; $25/$45 Office Copay/Specialist; $250/$500 DED In/Out; 80%/60% Coins In/Out; NA Coins Stoploss In/Out; $0/$10/$35/$75/$150 Pharmacy; $300/80% ER Copay/ER Coins; $75 Urgent Care Copay; $150/$250 IP In/Out; $100/$200 OP Surg In/Out; 70%/70% Ped Dental In/Out
Blue Choice PPO Network - PPO Plans - P601CHC: PLATINUM Plan; $25/$45 Office Copay/Specialist; $1250/$2500 DED In/Out; 100%/100% Coins In/Out; NA Coins Stoploss In/Out; $0/$10/$35/$75/$150 Pharmacy; $300/100% ER Copay/ER Coins; $75 Urgent Care Copay; $150/$250 IP In/Out; $100/$200 OP Surg In/Out; 70%/70% Ped Dental In/Out

The Account Summary Report is **not** emailed. Please access it through **Reports** on the online tool.

Note: Make sure that you review the data for accuracy prior to releasing the case. Once the case is released, no changes can be made. If additional information is required, you will be notified and your case will be opened to you to add the missing or requested information.

Return to Table of Contents

2 How to Enroll a Small Group (Contd.)

VII. Release for Enrollment (contd.)

The **Documents List** button in the header provides access to the list of required and optional documents required for enrollment. You can click where it says “Some of these forms are available for download here”. The BAP Downloadable Forms for Small Group Products will open in a new browser. From this browser, forms may be opened and saved for attachment in enrollment.

Documents List

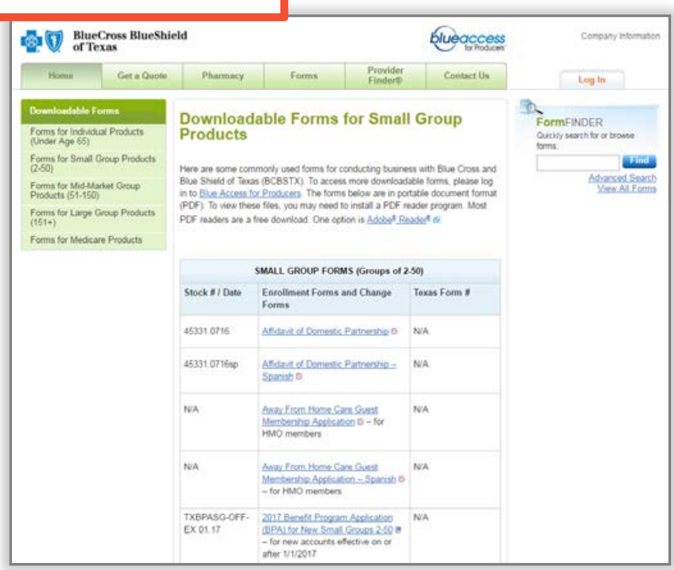
Please remember to gather these documents to attach at the end of the enrollment process.
Some of these forms are available for download here.

Required Documents

- Benefit Program Application (BPA) for New Small Groups 2-50
- Employer Group Information (EGI) Form
- Enrollment Application/Change Form
- State filed proof of business
- Wage & Tax Statement/Proof of Wages

Optional Documents

- Affidavit of Domestic Partnership
- BenefitWallet Discovery Form
- Dependent State Continuation of Coverage Form
- Disabled Dependent Certification Form
- Employer Representative Authorization (ERA)
- HSA Bank Discovery Form
- Other
- Small Group Certificate of Common Ownership
- Supplemental Employment Verification Form
- Texas Nine (9) Month State Continuation of Insurance Application Form



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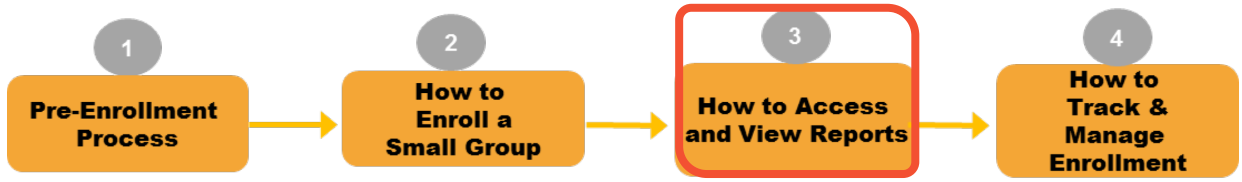
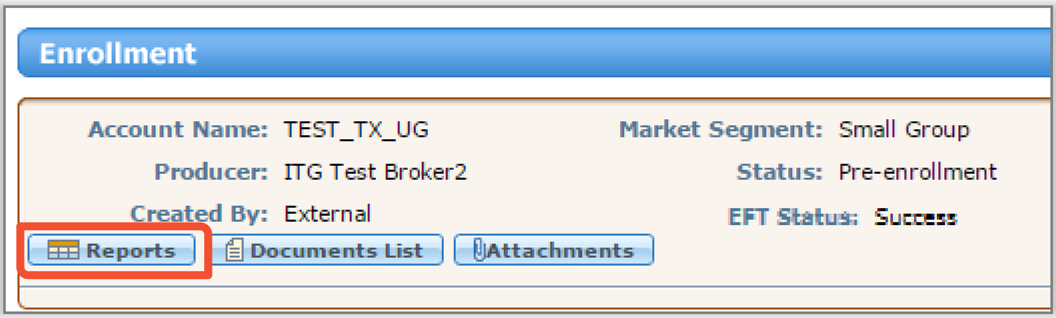
3 How to Access and View Reports



You can access and view reports by clicking **Reports** in the upper left-hand corner of each screen.



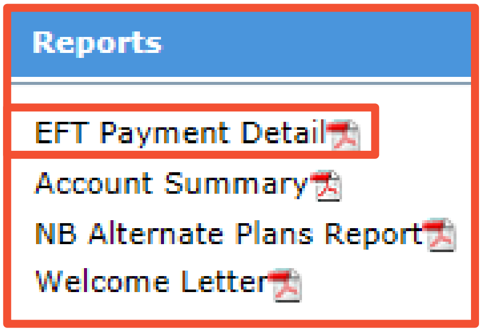
Types of documents accessible in the **Reports** tab include:

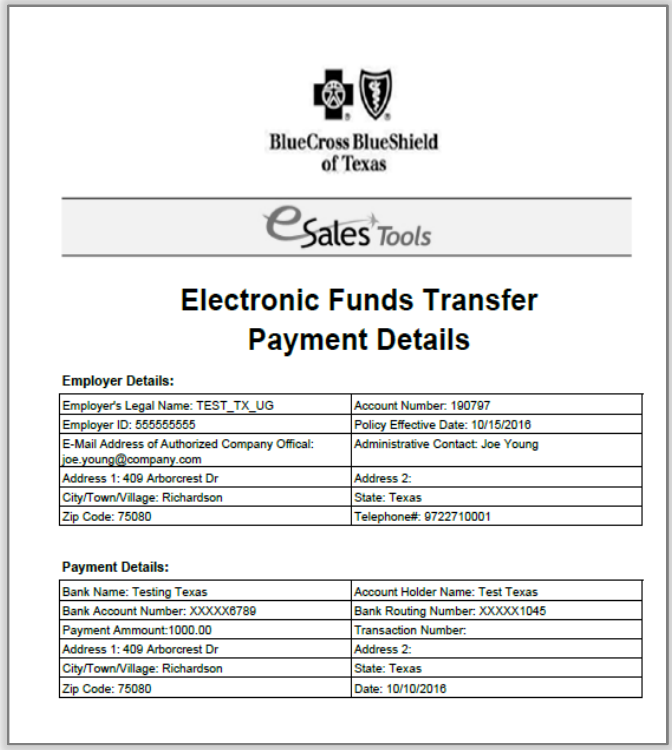
Welcome Letter:
The Welcome Letter is available after Underwriting approves the case. An email advising that the group has been approved will be sent to the producer or GA. You can then go into **Reports** to retrieve the Welcome Letter. The Welcome Letter itself will **NOT** be sent within the email.

Account Summary: The Account Summary Report will become available in the Reports List after **Continue** is clicked on the Account Summary screen.

Return to Table of Contents

3 How to Access and View Reports (Contd.)




BlueCross BlueShield of Texas

eSales Tools

Electronic Funds Transfer Payment Details

Employer Details:

Employer's Legal Name: TEST_TX_UG	Account Number: 190797
Employer ID: 555555555	Policy Effective Date: 10/15/2016
E-Mail Address of Authorized Company Offical: joe.young@company.com	Administrative Contact: Joe Young
Address 1: 409 Arborcrest Dr	Address 2:
City/Town/Village: Richardson	State: Texas
Zip Code: 75080	Telephone#: 9722710001

Payment Details:

Bank Name: Testing Texas	Account Holder Name: Test Texas
Bank Account Number: XXXXX6789	Bank Routing Number: XXXXX1045
Payment Ammount:1000.00	Transaction Number:
Address 1: 409 Arborcrest Dr	Address 2:
City/Town/Village: Richardson	State: Texas
Zip Code: 75080	Date: 10/10/2016

EFT Payment Details

The Electronic Funds Transfer (EFT) Detail report is available in the **Reports** tab. This report will capture the EFT information entered into the enrollment tool. This report is informational only and is not required to be submitted as part of the enrollment process.

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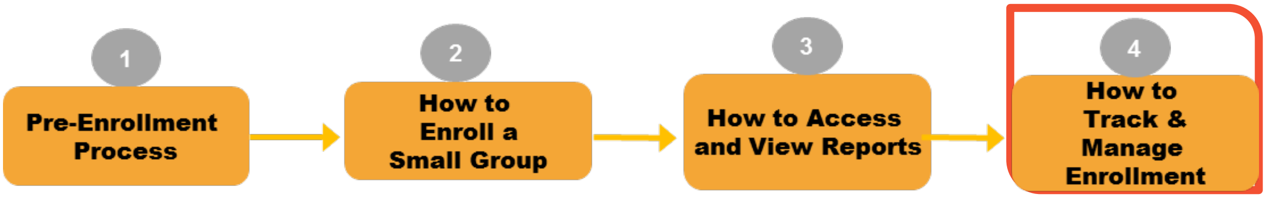
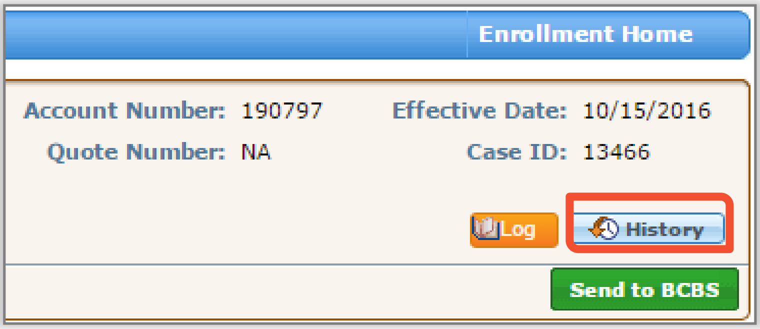
4 How to Track and Manage Enrollment

I. Enrollment Status

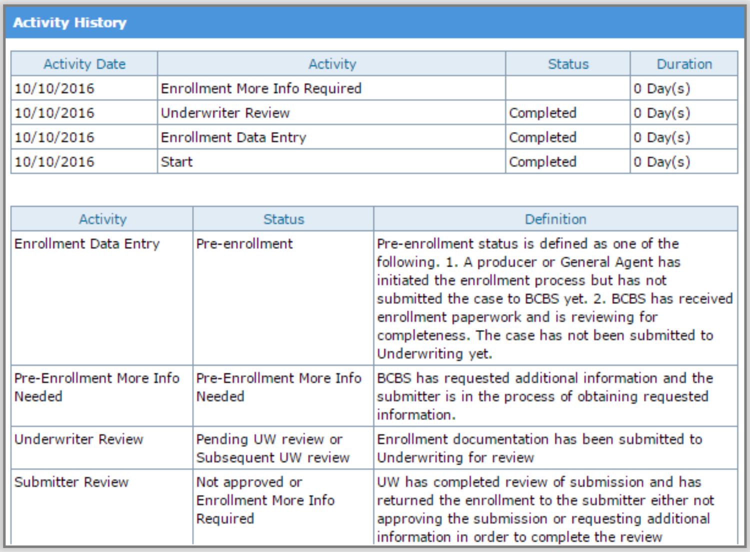


Once enrollment has been released, you can track the status of the case by searching the group from the **Enrollment** home page.

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. Once the group is selected, click **History**.



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.



Activity History

Activity Date	Activity	Status	Duration
10/10/2016	Enrollment More Info Required		0 Day(s)
10/10/2016	Underwriter Review	Completed	0 Day(s)
10/10/2016	Enrollment Data Entry	Completed	0 Day(s)
10/10/2016	Start	Completed	0 Day(s)

Activity	Status	Definition
Enrollment Data Entry	Pre-enrollment	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. BCBS has received enrollment paperwork and is reviewing for completeness. The case has not been submitted to Underwriting yet.
Pre-Enrollment More Info Needed	Pre-Enrollment More Info Needed	BCBS has requested additional information and the submitter is in the process of obtaining requested information.
Underwriter Review	Pending UW review or Subsequent UW review	Enrollment documentation has been submitted to Underwriting for review
Submitter Review	Not approved or Enrollment More Info Required	UW has completed review of submission and has returned the enrollment to the submitter either not approving the submission or requesting additional information in order to complete the review

Note: Quick status information can also be found in the header next to **Status**.

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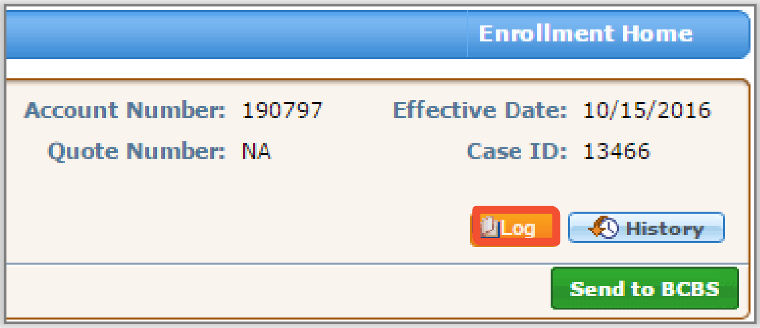
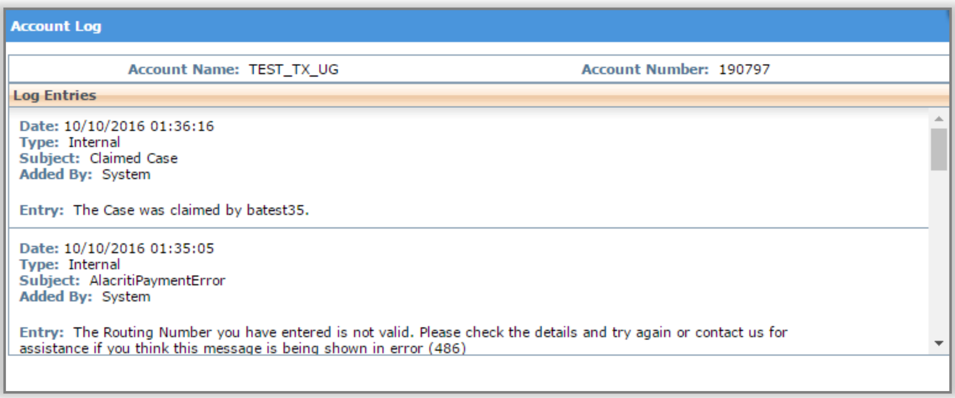
4 How to Track and Manage Enrollment (Contd.)

I. Enrollment Status (contd.)





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. This will be the same information that would have been included in the email notification. Or you can also attach a separate document to provide additional clarification to the underwriter as needed.
- If the EFT transaction status is **Fail**, then you should view the **Log** for the reason and description as received from the payment vendor.

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4 How to Track and Manage Enrollment (Contd.)

II. More Information Required

In this example, once you have released the group for enrollment, the Underwriter reviews the case and sends an email notification requesting for more information.

The email notification includes the information that is required to complete the enrollment review. In this example, the underwriter requires completed documents from the Producer.

Sample "More Information Required" email notification is below.

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 #13425. The following information needs to be updated or provided:

- Missing/Incorrect/Incomplete Document (s)

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.

Return to Table of Contents

4 How to Track and Manage Enrollment (Contd.)

II. More Information Required (contd.)

You will receive automated email notifications from the tool 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.

Sample of the Aging Alert email is below.

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 pended 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.

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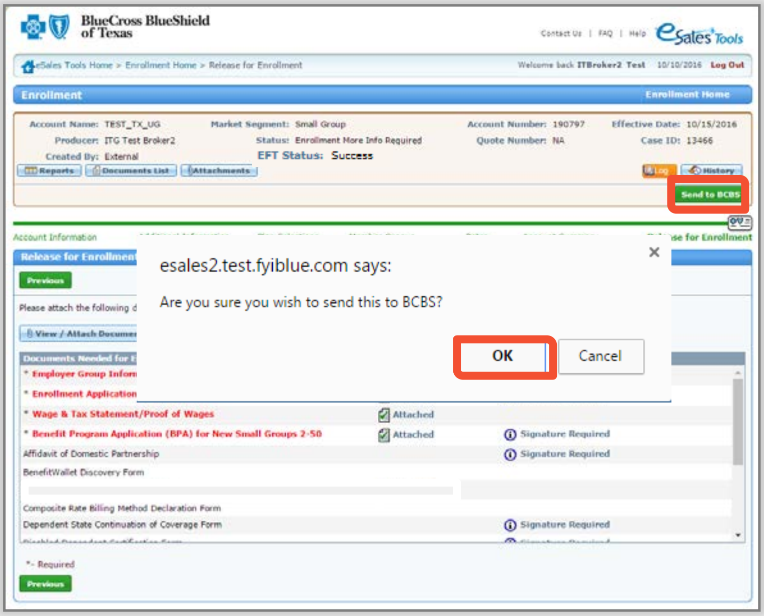
4 How to Track and Manage Enrollment (Contd.)

II. More Information Required (contd.)

Once you receive an email notification from the Underwriting team, you logon to the eSales Tools.

If Underwriting needs more information you may need to add or update information in one of the fields within the tool, as well as add some missing documentation.

In this example, you need to upload completed documents. You move to the **Release for Enrollment** screen and add the requested documents. Then, on this screen, you click **Send to BCBS** and then **OK**. The case will be returned to Underwriting for approval. The status of the case will be updated to “Pending UW Review”.



Note: You will have to navigate to the **Account Summary** screen to activate the **Send to BCBS** button. In this example, since we have to upload documents, we have moved to the **Release for Enrollment** screen.

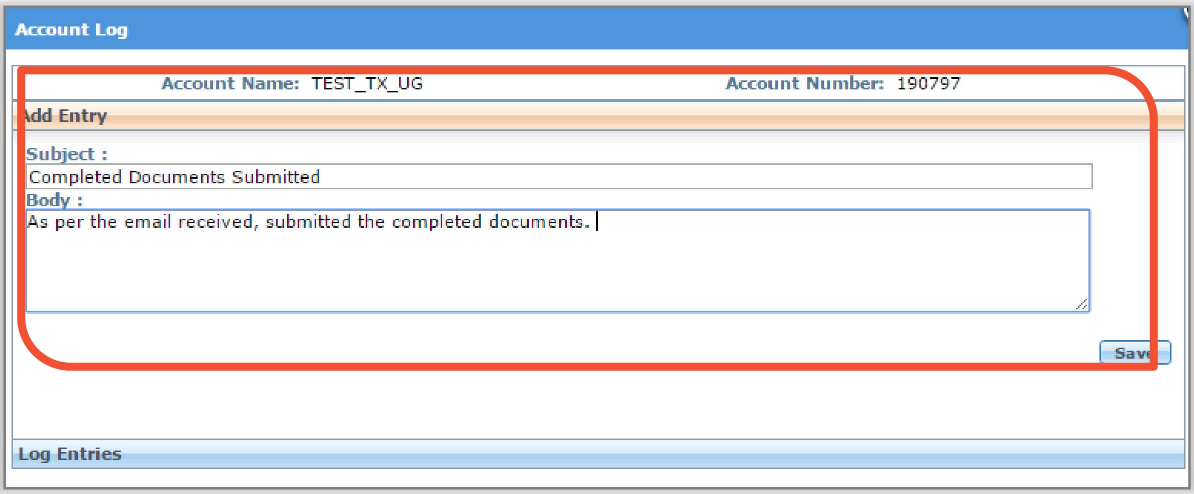
Return to Table of Contents

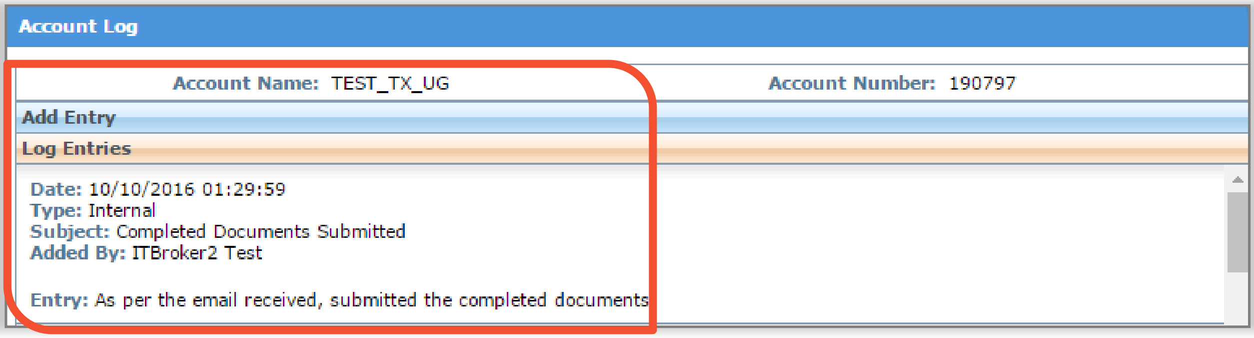
4 How to Track and Manage Enrollment (Contd.)

II. More Information Required (contd.)

You can add a log entry for this activity. Click **Log**, and **Add Entry** to communicate directly with the assigned Underwriter. Use the log entry to provide additional details pertaining to your case.

Once you click the **Send back to BCBS** button in the "*More Info Required*" activity, a system log entry is created.





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4 How to Track and Manage Enrollment (Contd.)

III. Underwriting Approval Received

An email notification will be sent to the General Agent (if applicable) or the Producer once the case has been approved by Underwriting.

Sample **'Enrollment Approved'** email below.

Blue Cross and Blue Shield of Texas (BCBSTX) has approved TEST_TX_UG for small group employer coverage with an effective date of 10/15/2016.

BCBSTX is in the process of finalizing your group's enrollment. You will receive another email notification after Identification Cards have been requested.

To access the Welcome Letter for this account's enrollment, log into eSales using the below link and instructions:

https://producers.hcsc.net/producers/login

1. Select **ACA Small Group Enrollment** from eSales Home Page

2. Search for your account in enrollment, once found, select the View option next to the account name

3. From the account information page select Reports

4. Select Welcome Letter

Thank you for your business.

Please do not reply to this e-mail. This e-mail box is designated for outgoing messages only.

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.

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4 How to Track and Manage Enrollment (Contd.)

III. Underwriting Approval Received (contd.)

The Welcome Letter is available after Underwriting approves the group. An email advising that the group has been approved is sent to the producer or GA. You can then click **Reports** in the tool and retrieve the Welcome Letter. The Welcome Letter itself is **NOT** sent within the email. An email is also sent once membership is complete.

Sample "Welcome Letter" below.

Welcome Letter

BlueCross BlueShield of Texas

October 10, 2016
ITG Test Broker2
901 South Central Expressway
Richardson,TX 75080

RE: TEST_TX_UG
Account #:190797
Effective Date:10/15/2016

TEST_TX_UG has been approved and your rates are indicated below. These rates are effective 10/15/2016.

Enrollment information, including member applications, is being processed. Member ID cards will be mailed shortly. Thank you for your continued business.

General Information:							
Waiting Period:60	COBRA: N	COBRA Admin:N	TEFRA:	Public Entity:	County: Dallas	In-Vitro: N	Domestic Partner: N

Benefit Summary:
Blue Choice PPO Network - PPO Plans - P600CHC: PLATINUM Plan; $25/$45 Office Copay/Specialist; $250/$500 DED In/Out; 80%/60% Coins In/Out; NA Coins Stoploss In/Out; $0/$10/$35/$75/$150 Pharmacy; $300/80% ER Copay/ER Coins; $75 Urgent Care Copay; $150/$250 IP In/Out; $100/$200 OP Surg In/Out; 70%/70% Ped Dental In/Out
Blue Choice PPO Network - PPO Plans - P601CHC: PLATINUM Plan; $25/$45 Office Copay/Specialist; $1250/$2500 DED In/Out; 100%/100% Coins In/Out; NA Coins Stoploss In/Out; $0/$10/$35/$75/$150 Pharmacy; $300/100% ER Copay/ER Coins; $75 Urgent Care Copay; $150/$250 IP In/Out; $100/$200 OP Surg In/Out; 70%/70% Ped Dental In/Out

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4 How to Track and Manage Enrollment (Contd.)

III. Underwriting Approval Received (contd.)

Temporary ID Cards: An email notification is sent to the General Agent (if applicable) or the Producer when ID cards are released, indicating that temporary ID cards are available as of the effective date of the group.

Sample 'ID Cards Released' email below.

Membership processing for TEST_TX_UG (Account # 190797) is complete and member ID cards have been requested. Temporary ID cards will be available as of the effective date of the account. To access temporary IDs for members of this account, follow these steps:

1. Log into Blue Access for Producers (BAP) using the following link: https://producers.hcsc.net/producers/login
2. From the BAP homepage, click the Blue Access for Employers (BAE) icon to access the BAE Account Search screen.
3. Select an account name from the listing. A maximum of 200 accounts will be listed.
4. If the account name is not listed, enter the name in the search fields and click **Find**.
5. Find the employee or dependent by using one of two search methods:

Search Option 1:
   a. On the BAE homepage, select the **Request/Print ID Card** option from the "I want to" menu.
   b. Select the **Employee** or **Dependent** radio button as appropriate.
   c. Enter the employee or dependent's SSN/ID Number or Last Name.
   d. Click the **Find** button.

Search Option 2:
   a. On the BAE homepage, click **Employee Maintenance** then **View/Update Employee** in the left-hand menu bar.
   b. Select the **Employee** or **Dependent** radio button as appropriate.
   c. Enter the employee or dependent's SSN/ID Number or Last Name.
   d. Select **Request/Print ID Card** from the "I want to" menu.
   e. Click the **Find** button.

6. Click on the employee or dependent's name in the Search Results table to be taken to the Request/Print ID Card screen.
7. To print a temporary ID card, click on the **Print a temporary ID card** link.
8. To email a temporary ID card, click on the **Email a temporary ID card** link.
9. Follow the instructions on the screen.
10. Click the **Confirm** button

Thank you for your business.
Please do not reply to this e-mail. 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.

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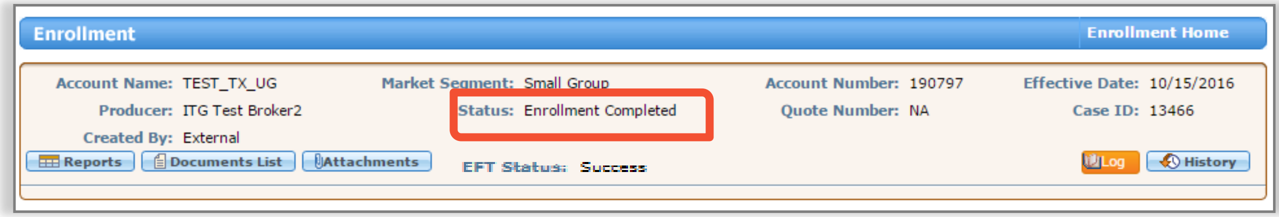
4 How to Track and Manage Enrollment (Contd.)

III. Underwriting Approval Received (contd.)

Once your case completes the ID Cards Released and Release Initial Bill activities, your case enrollment is complete.



Note: If the case is not approved for enrollment by Underwriting, a **Not Approved** email notification is sent to the Producer or GAs with the reason code(s). Contact our Service Center at *1-800-399-5831* if you have questions regarding a case that is not approved.

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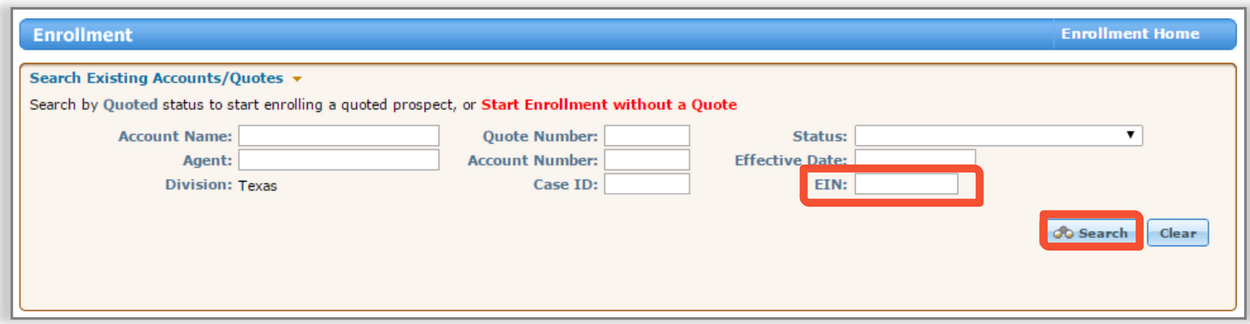
4 How to Track and Manage Enrollment (Contd.)

Search Functionality

- 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).



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4 How to Track and Manage Enrollment (Contd.)

IV. My Enrollments

During enrollment, if you want to view the status of the case, you can check the **My Enrollments** section of the enrollment tool. This section lists all cases currently in the enrollment process. The section will list the enrollments that you have enrolled using the tool yourself. You may sort columns for easy tracking.

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

Note: 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.

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4 How to Track and Manage Enrollment (Contd.)

IV. My Enrollments (contd.)

The **Recently Accessed** section lists all the enrollments that you have searched and viewed. This could be a combination of cases enrolled by yourself or by BCBS.

Recently Accessed

Account	Effective Date	Sales Executive	Divison	Status	Last Activity
View TEST_TX_UG	10/15/2016		TX	Enrollment Completed	10/10/2016
View TEST_TX_UG	10/15/2016		TX	Enrollment More Info Required	10/10/2016
View TX_UG	10/15/2016		TX	Pre-enrollment	10/10/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/10/2016
View AMATEST TX 1009 EXT	11/01/2016		TX	Pending UW review	10/09/2016
View JPM R4 TOUCHPOINT AGING AND EMAILS	01/01/2017		TX	In Progress	10/07/2016
View AMATEST TX 1007 RC EXT	11/01/2016		TX	Pending UW review	10/07/2016
View TEST_TX_UG	10/01/2016		TX	Pre-enrollment	10/07/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016
View TEXT_TX_UG	10/15/2016		TX	Pre-enrollment	10/07/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/07/2016
View AMATEST TX 1006 EXT	11/01/2016		TX	Pending UW review	10/06/2016
View AMATEST SS 1006	01/01/2017		TX	Pre-enrollment	10/06/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/05/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/05/2016
View AMATEST_TX_1_1005	11/01/2016		TX	Complete Acct/Membership entry	10/05/2016
View SYS Account Name Place Holder	-		TX	Pre-enrollment	10/05/2016

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Resources and Help

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

If there are any questions regarding any of the information within the user manual or the enrollment process, please feel free to email us at: **ACASmallGroupEnrollmentSupport@bcbsil.com**

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