BlueCross BlueShield of New Mexico

ACA/Small Group Enrollment Tool User Guide

March 2023

493994.0520

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Purpose

The purpose of this user guide is to provide step-by-step instructions and guidance to Producers as they enroll their groups using the enhanced eSales Small Group Enrollment application.

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

Overview of the Enrollment Process

The eSales 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, vision and ancillary 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 review.

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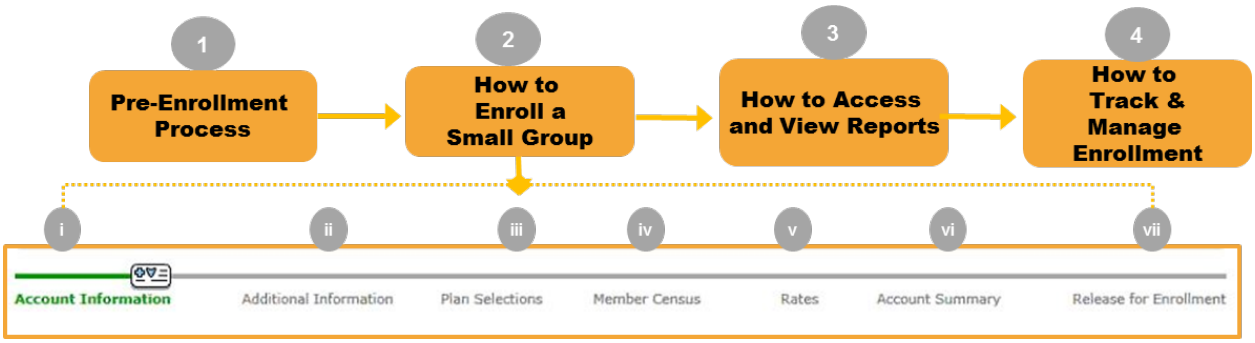
Overview of the Enrollment Process

Let's review the steps to enroll a small group (2-50 employees) using the eSales Small Group Enrollment tool.



Let's begin the online enrollment process. Once you have gathered the necessary information and documentation from your client, access the eSales 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 Enrollment

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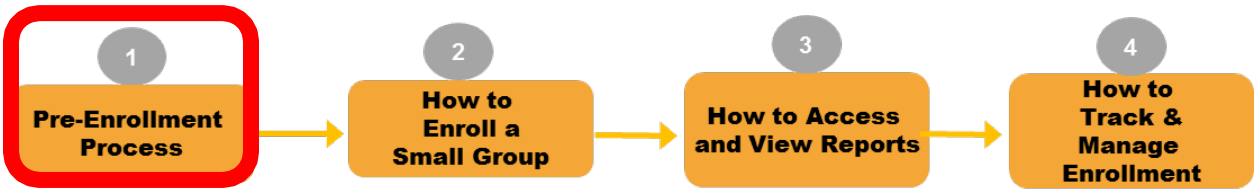
1 Pre-Enrollment Process

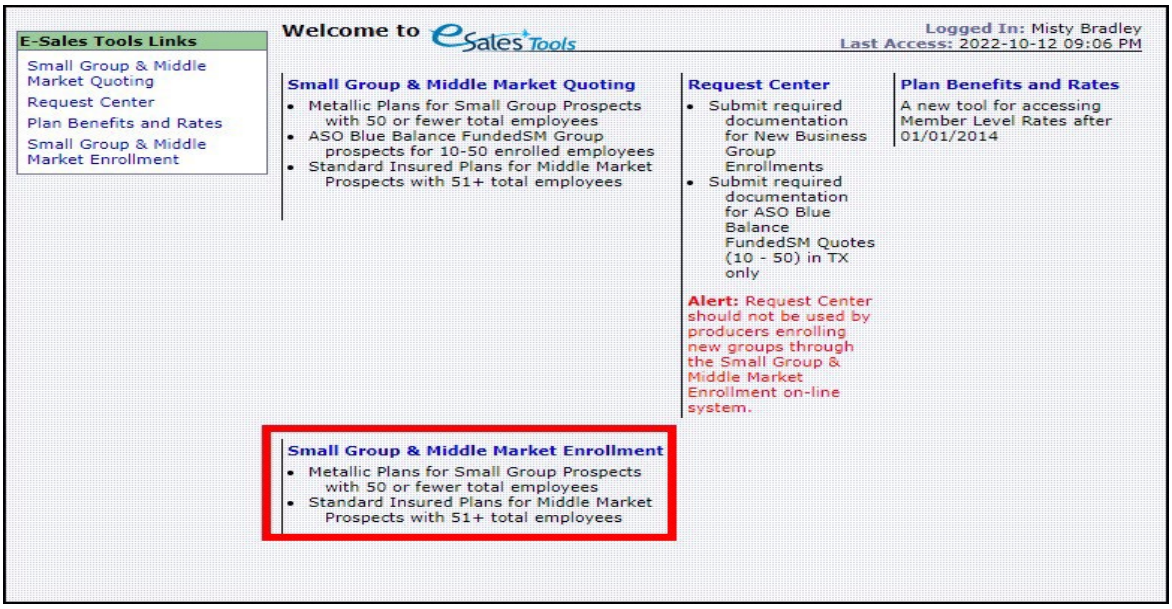


Let's begin the online enrollment process. First, you must login to Blue Access for Producers (BAP) or the Producer Portal and navigate to the eSales Tools Home Page.

Accessing the eSales Small Group Enrollment Tool

It is recommended to use the Google Chrome or Edge 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 **Small Group & Middle Market Enrollment** link to begin the enrollment process. This link is for small groups with 2-50 total employees.



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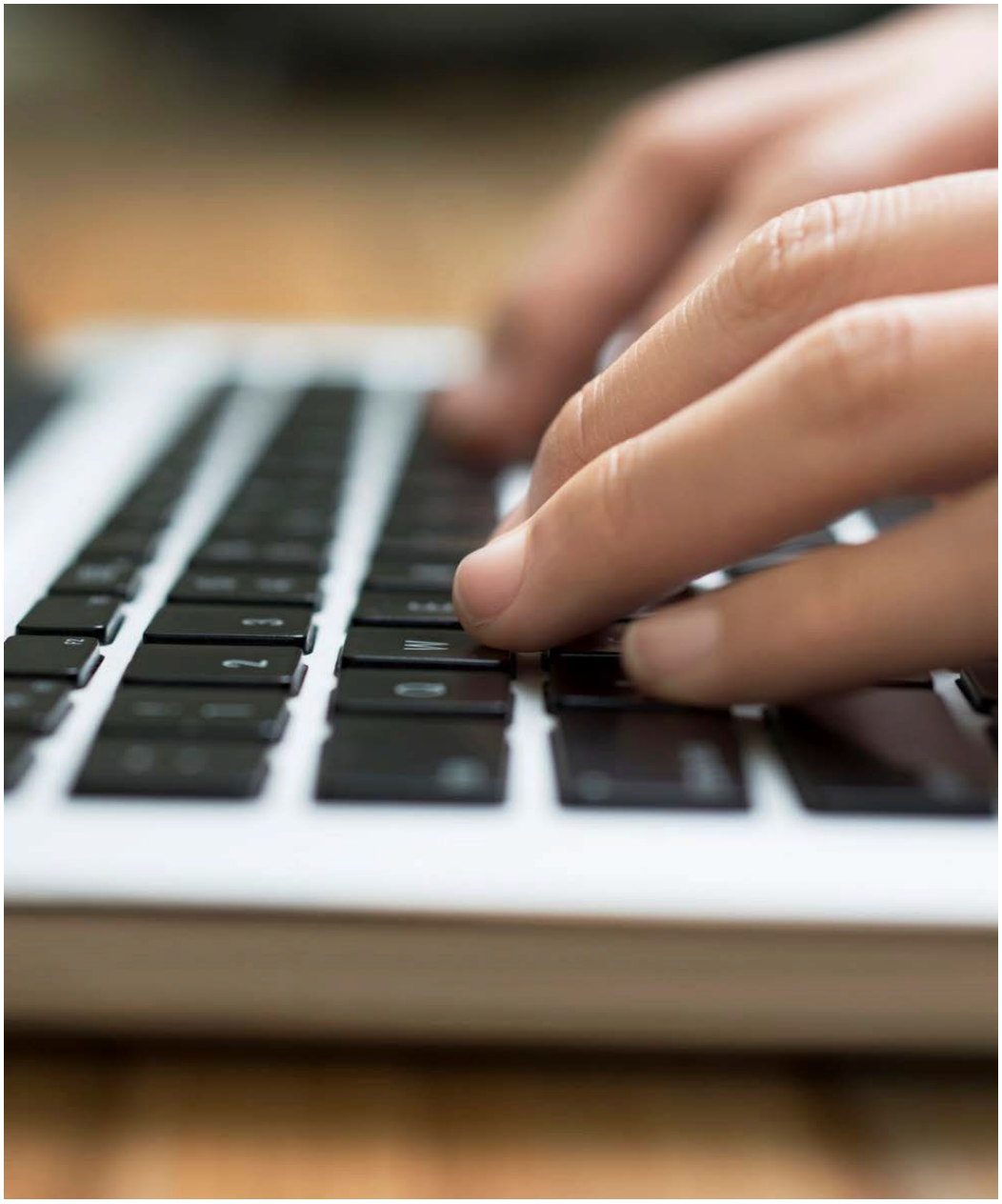

Enrollment with a Quote

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

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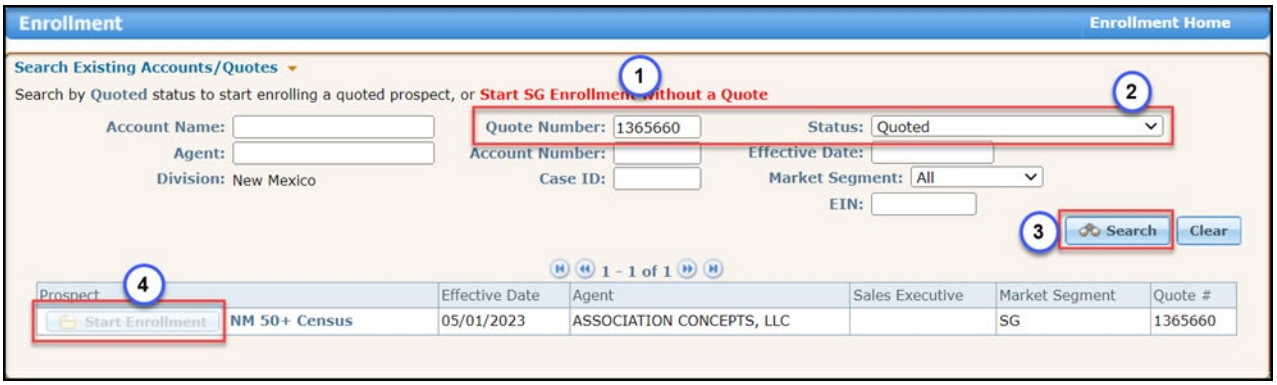
Pre-Enrollment Process (Cont'd.)

Enrolling with a Quote

Once you have logged on to the producer portal and clicked the **Small Group Enrollment** link within the eSales Tool, you can use the quote you created for this group.



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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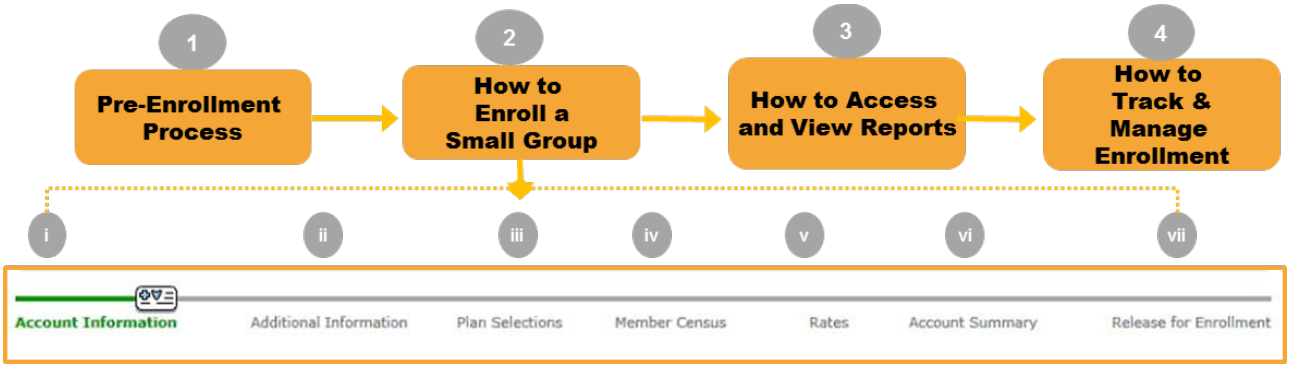
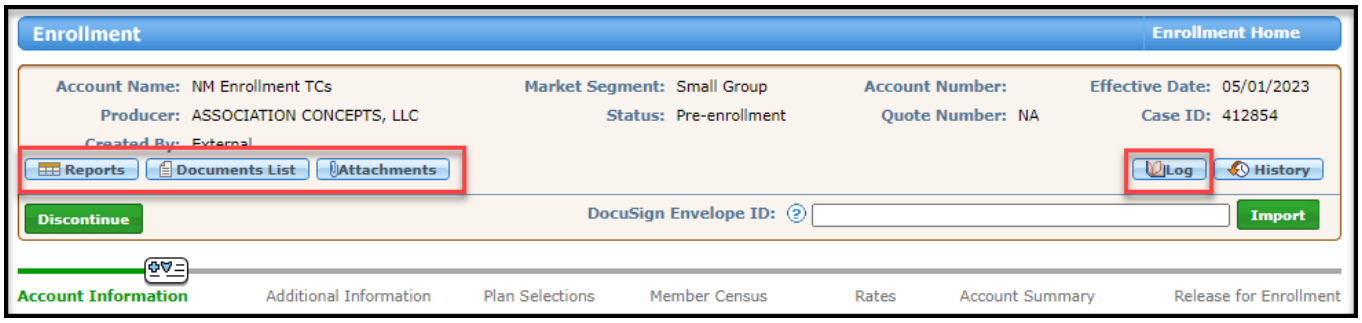
2 How to Enroll a Small Group



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 thesame progress bar to walk you through this user guide.



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

Reports: Opens a list of available reports.

Documents List: Opens a list of required documents.
Attachments: Allows users to attach the required documents. This functionality will be discussed in more detail later in the training.
Discontinued: Allows users to discontinue a case any time throughout the Enrollment process.

Log: Real Time entries can now be made by the producer up until Underwriter approval. The internal user will receive notification of log entries.

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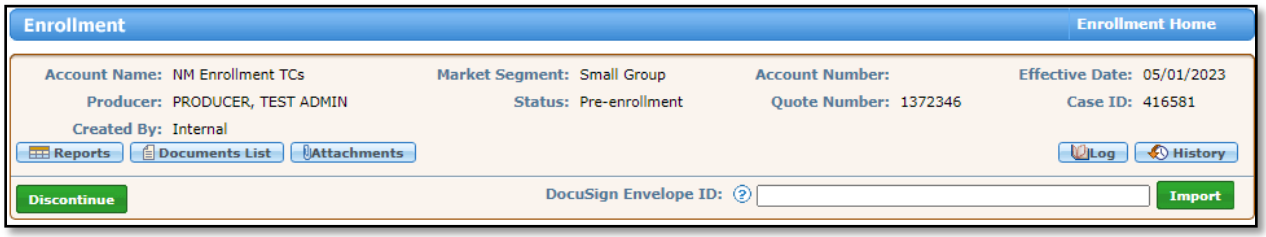
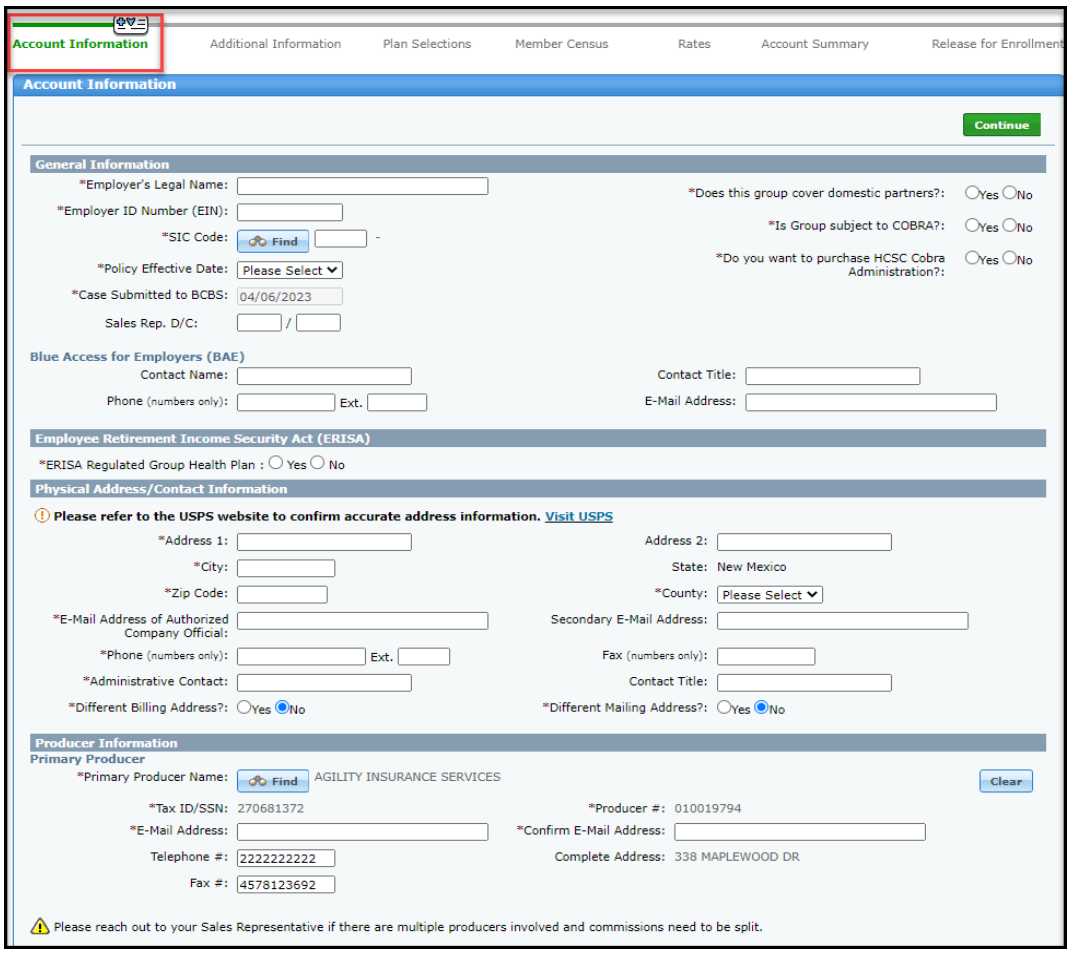
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)

If you enroll with a quote, the enrollment header will include all the data except the Account Number. The **Account Information** screen will also have some data pre-populated. Fill in all the required information on this screen under the General Information section.





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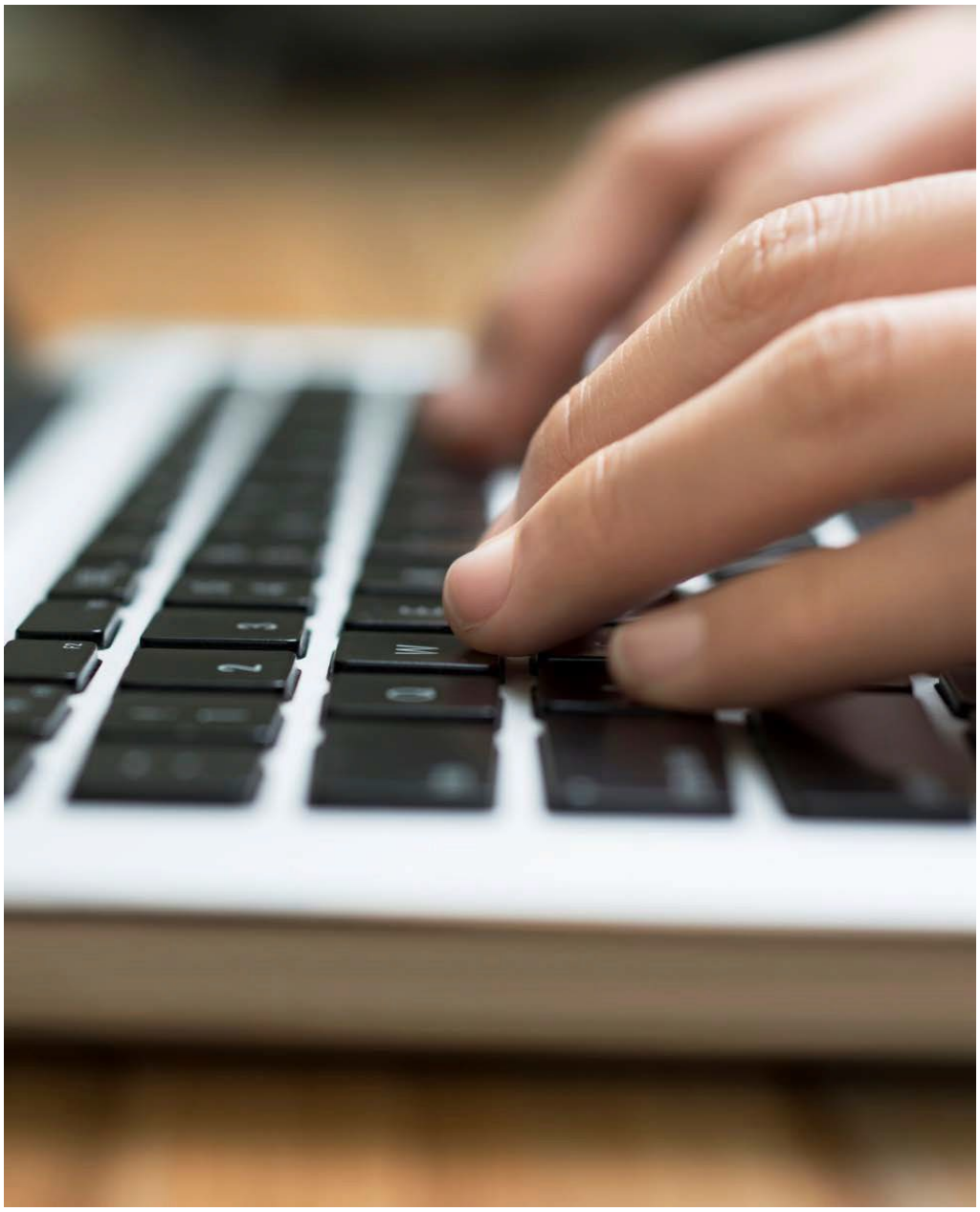

Enrollment without a Quote

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

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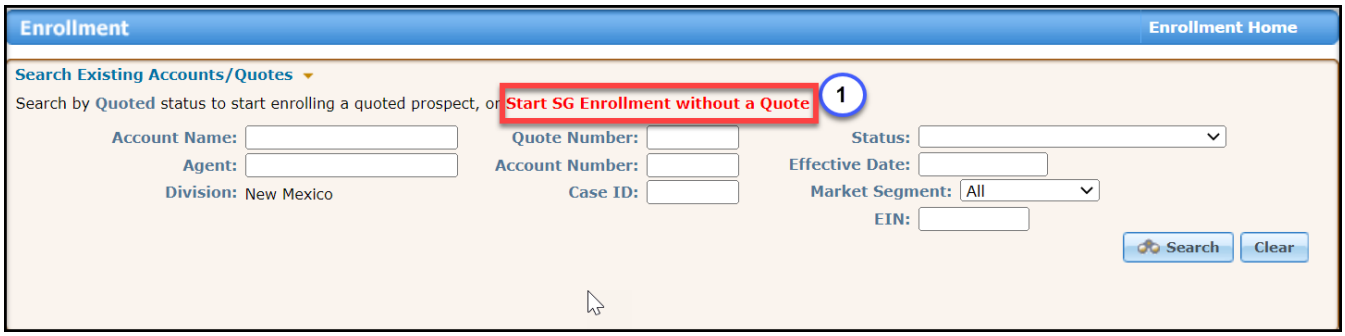
1 Pre-Enrollment Process (Cont'd.)

Enrolling without a Quote

You can also start the enrollment process without a quote.



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

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

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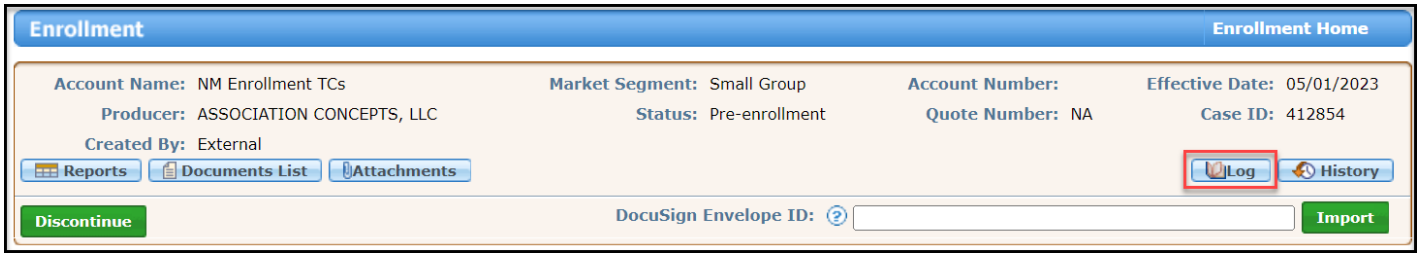
2 How to Enroll a Small Group (Cont'd.)

I. Account Information



Step I: Account Information

When you start an enrollment **without a quote**, some Account Information will be blank in the case header, until entered in the system. Other information will prepopulate for you:

- Account Name: blank
- **Market Segment**: **Small Group**
- Account Number: blank
- Effective Date: blank
- **Producer name**:
- **Status**: **Pre-Enrollment**
- **Case ID**: **Unique number assigned to case.**
- Quote Number: NA
- **Created By**: **External**

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.

Log: Real Time entries can now be made by the producer up until Underwriter approval. The internal user will receive notification of log entries.

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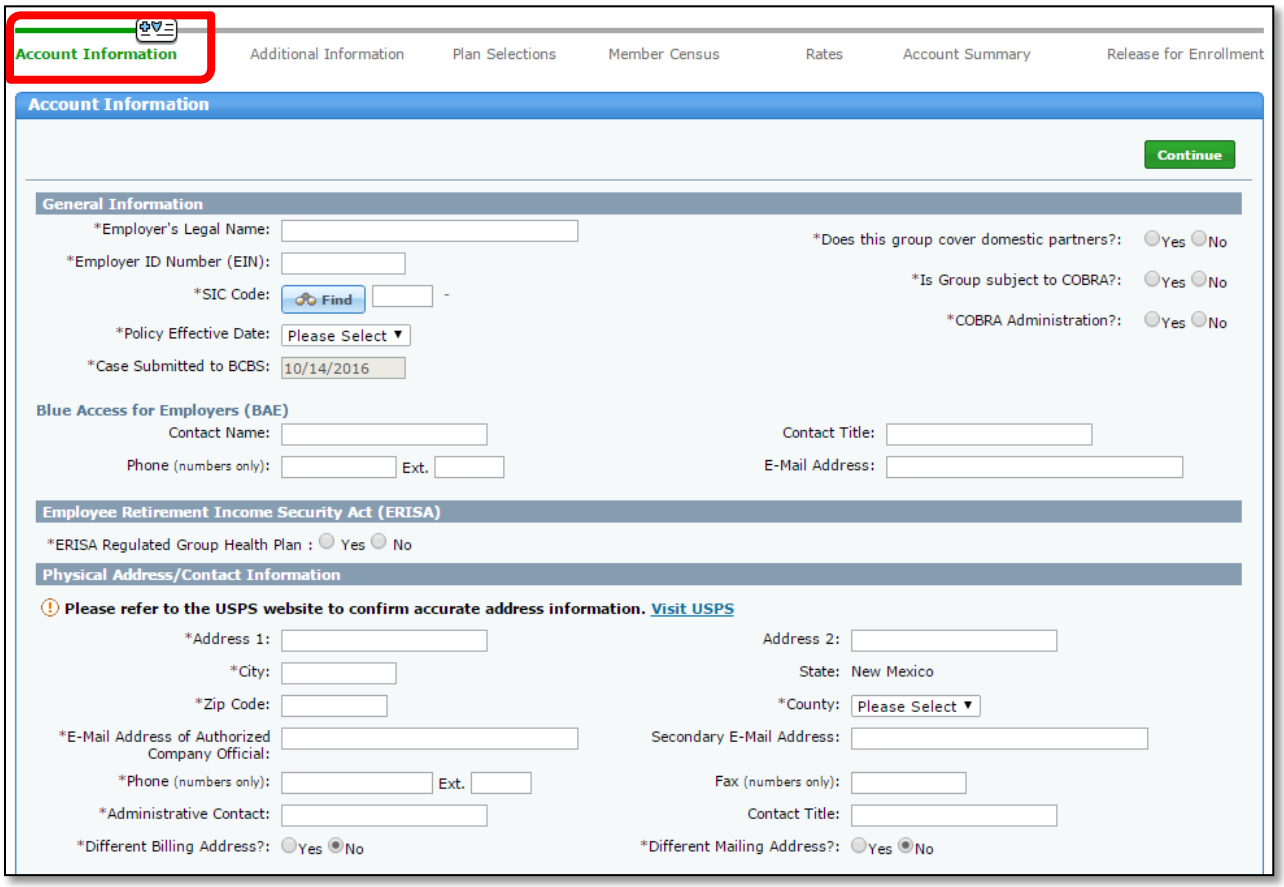
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)



The **Account Information** screen will be blank. You have to manually enter the data in all the required fields.

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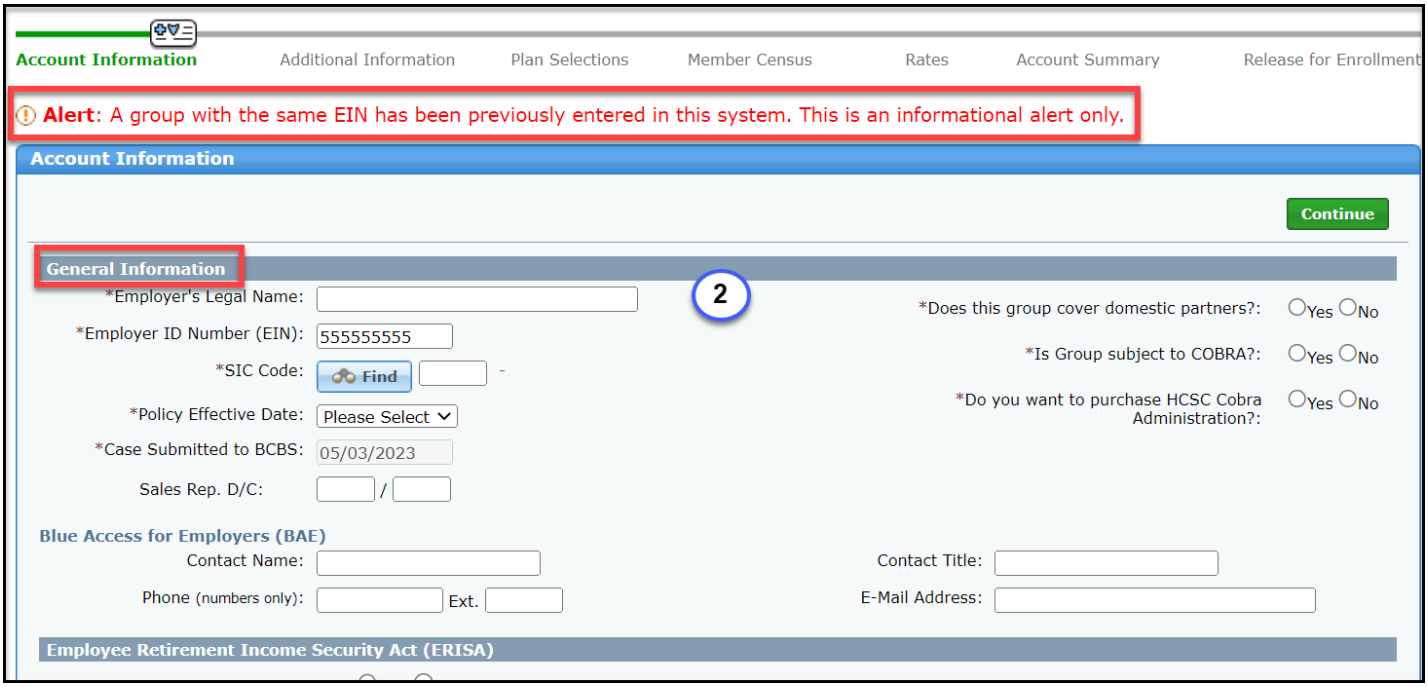
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)

2. Enter the required information in the General Information section



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*." The tool will still allow you to enroll the case. This message will also appear on the Account Summary screen.

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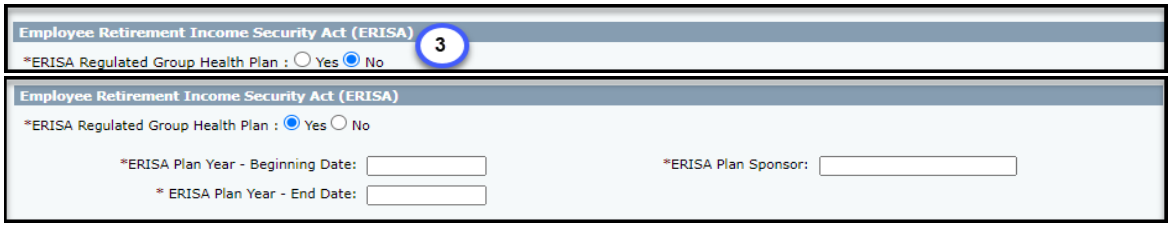
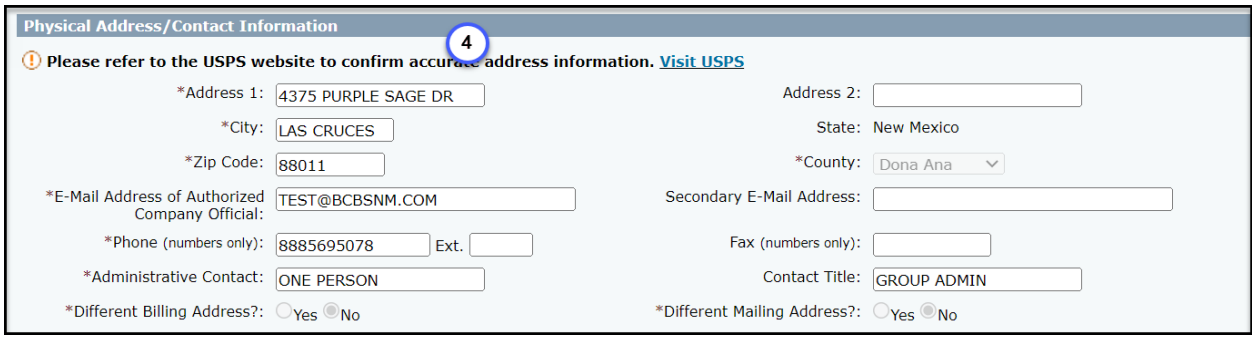
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)



After entering the information in the General Information section, answer the **Employee Retirement Income Security Act (ERISA)** question.

3. When answering the ERISA question as Yes, there are additional fields that need to be answered. In this example, we select the option 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 county 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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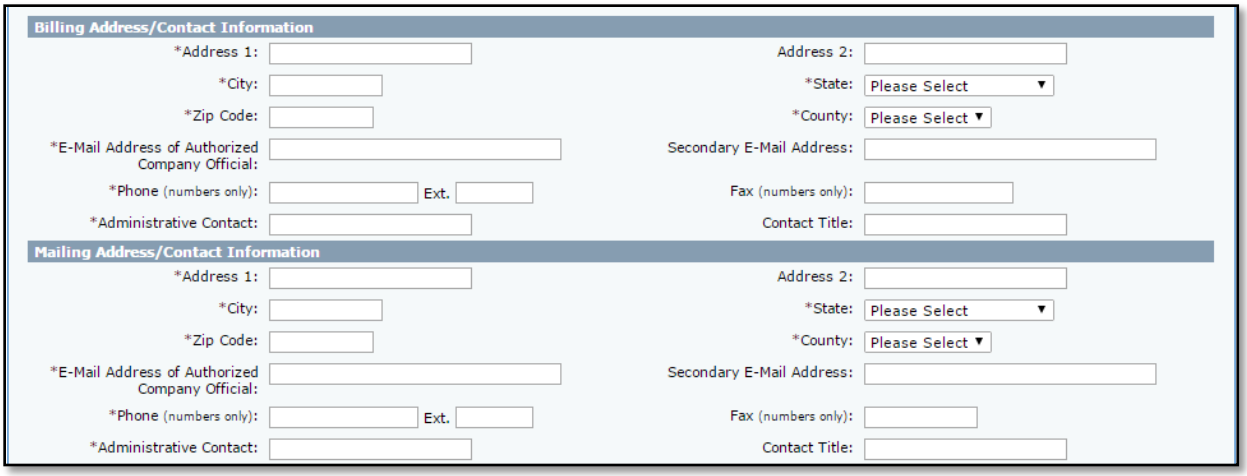
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)

Optional Step:

If there are separate physical and mailing addresses, select the **No** radio button for billing address and **Yes** radio button for the mailing address to populate the additional mailing address fields. Enter the required information.

If **Yes** is selected for the 'different billing' and/or 'different mailing address' questions, additional fields will populate. Enter all required information.



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

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

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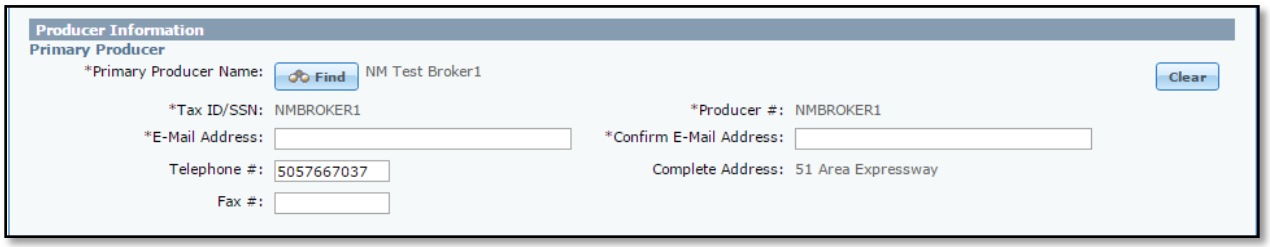
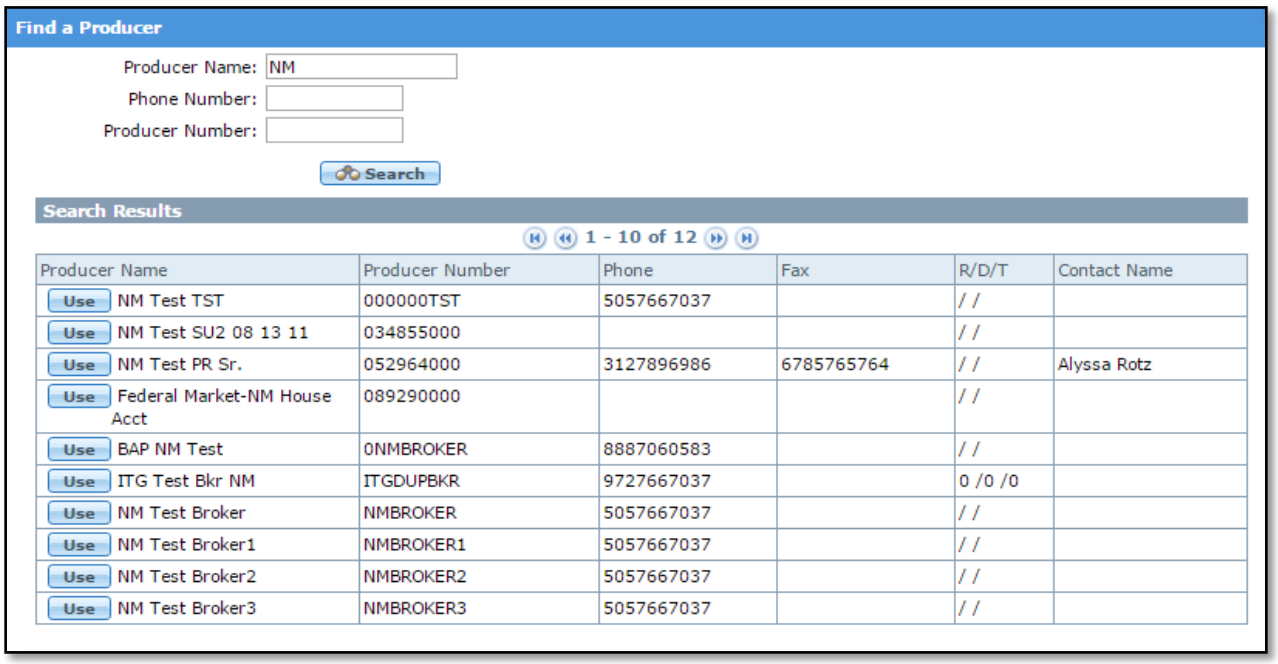
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)

In the **Producer Information** section, the Primary Producer information may appear blank. You will update the Primary Producer by clicking **Find**. In this example, we search by the **Producer's** name.

Click **Search**. Once the appropriate Producer is displayed, select your name by clicking **Use**. After selecting, you are automatically re-directed to the **Account Information** screen.





Producer Name	Producer Number	Phone	Fax	R/D/T	Contact Name
Use NM Test TST	000000TST	5057667037		/ /	
Use NM Test SU2 08 13 11	034855000			/ /	
Use NM Test PR Sr.	052964000	3127896986	6785765764	/ /	Alyssa Rotz
Use Federal Market-NM House Acct	089290000			/ /	
Use BAP NM Test	0NMBROKER	8887060583		/ /	
Use ITG Test Bkr NM	ITGDUPBKR	9727667037		0 /0 /0	
Use NM Test Broker	NMBROKER	5057667037		/ /	
Use NM Test Broker1	NMBROKER1	5057667037		/ /	
Use NM Test Broker2	NMBROKER2	5057667037		/ /	
Use NM Test Broker3	NMBROKER3	5057667037		/ /	

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

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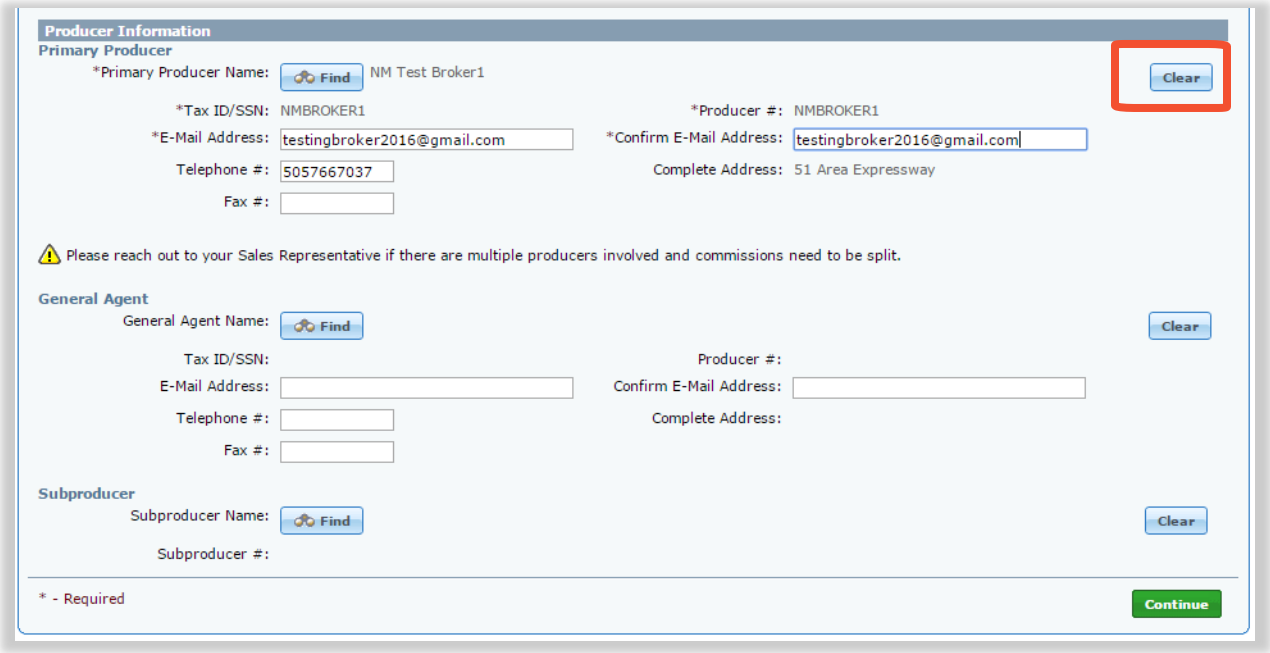
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)

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



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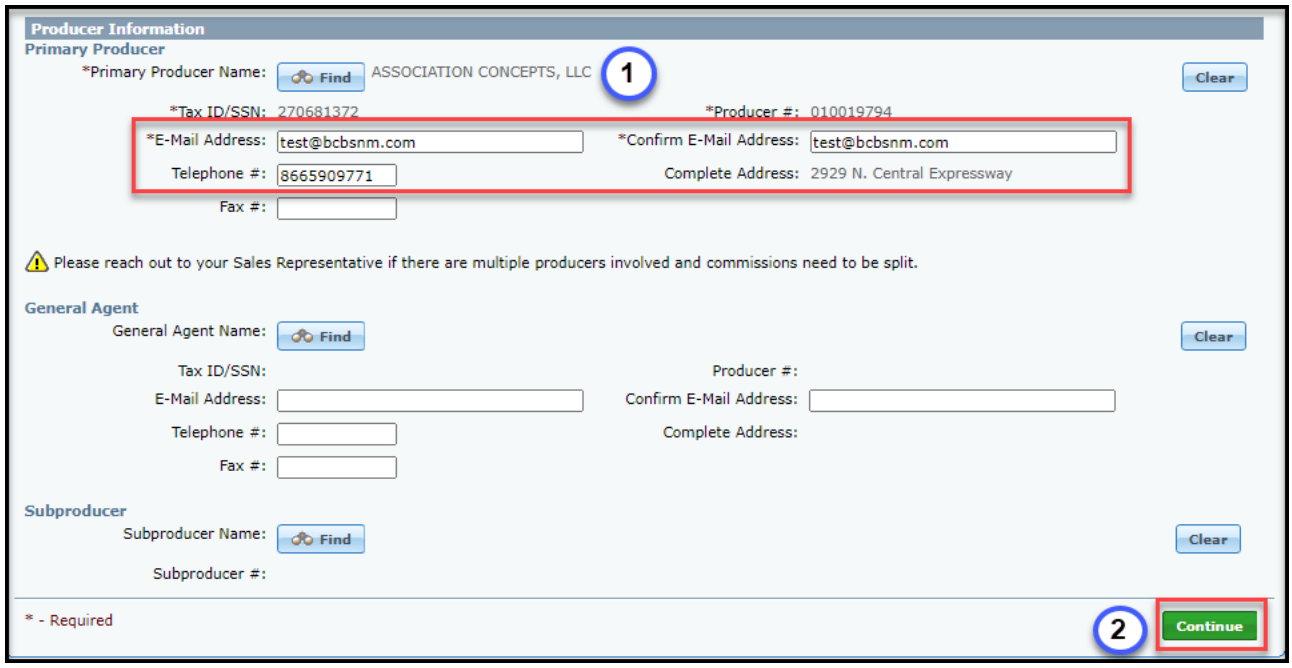
2 How to Enroll a Small Group (Cont'd.)

I. Account Information (Cont'd.)

1. 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. Re-enter the email address to validate it.

2. 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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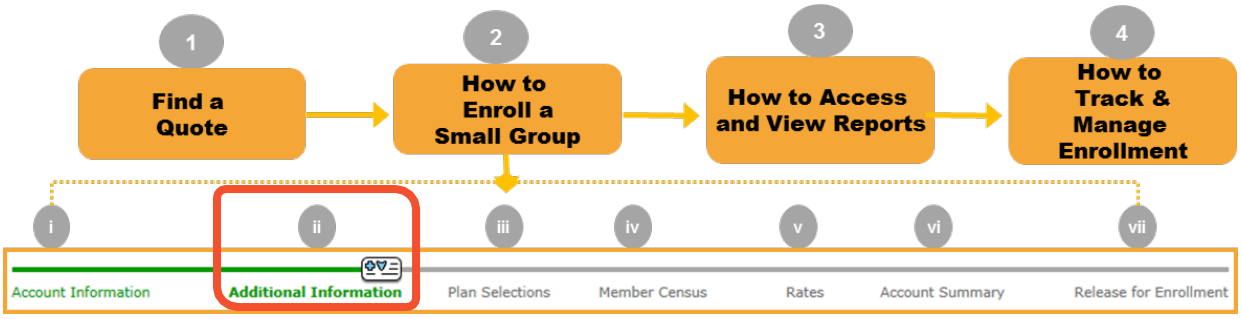
2 How to Enroll a Small Group (Cont'd.)

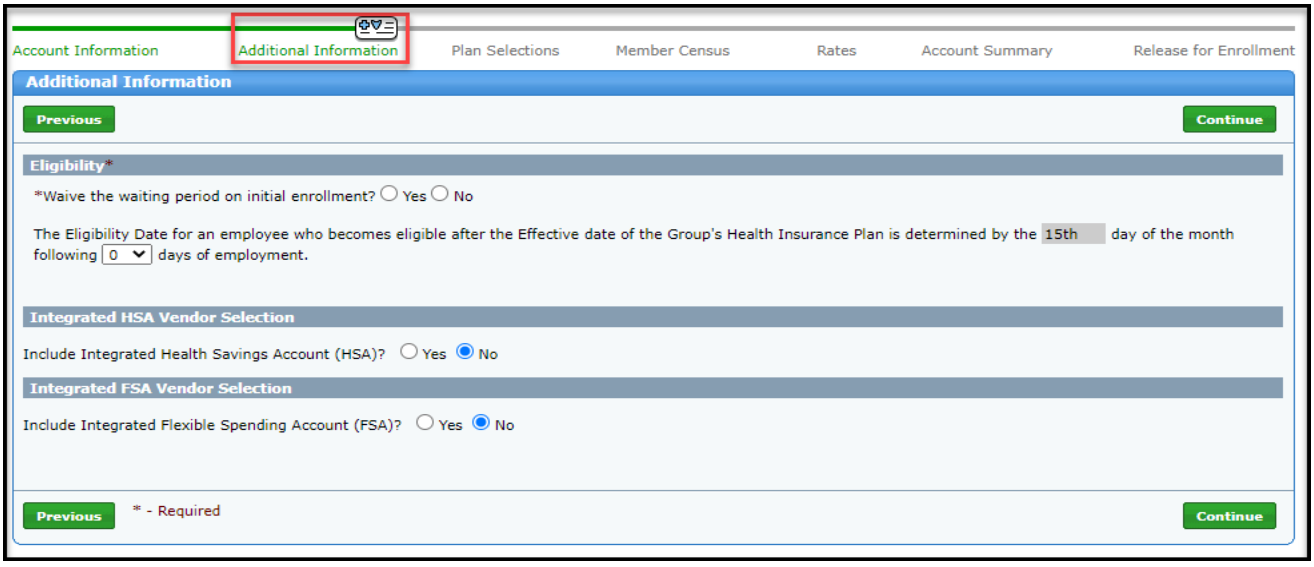
II. Additional Information



In the earlier step, you 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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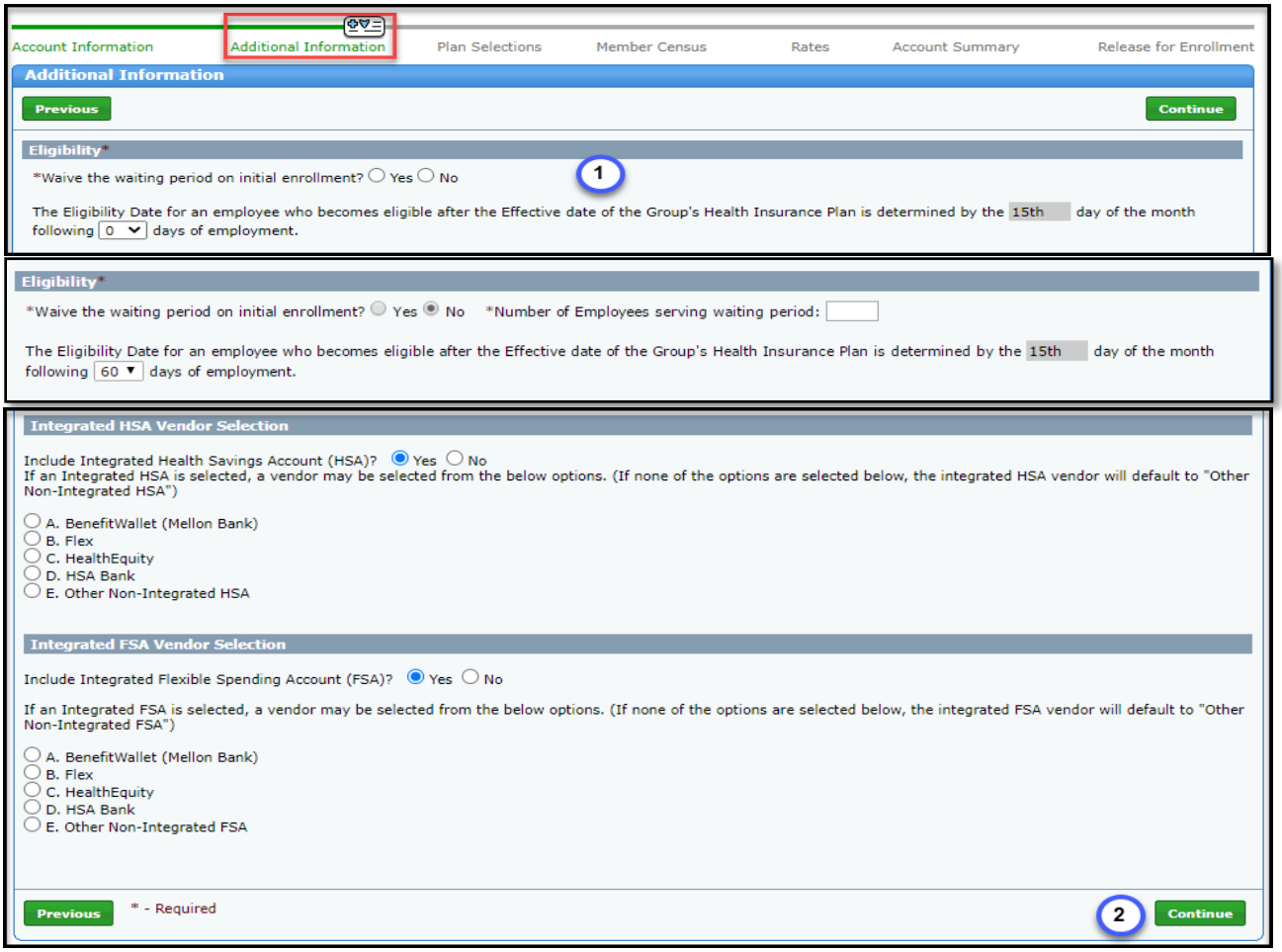
2 How to Enroll a Small Group (Cont'd.)

II. Additional Information (Cont'd.)

1. On the **Additional Information** screen, enter data in all the required fields. In the **Eligibility** section, if you select the **No** option, additional fields will be displayed. In this example, we select **Yes**. You can enter a number from "1- 60" for employees who have become eligible after the **Effective Date** of their health plan.
   In the Health Savings Account (HSA) Vendor selection section, if an HSA is selected on the paperwork, a vendor may be selected here from the available options.
2. Click **Continue** to proceed to the **Plan Selections** screen.



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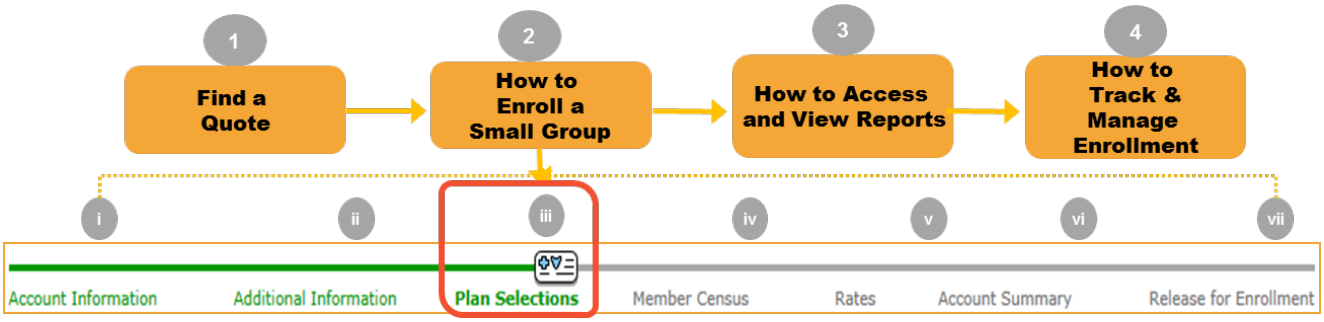
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections

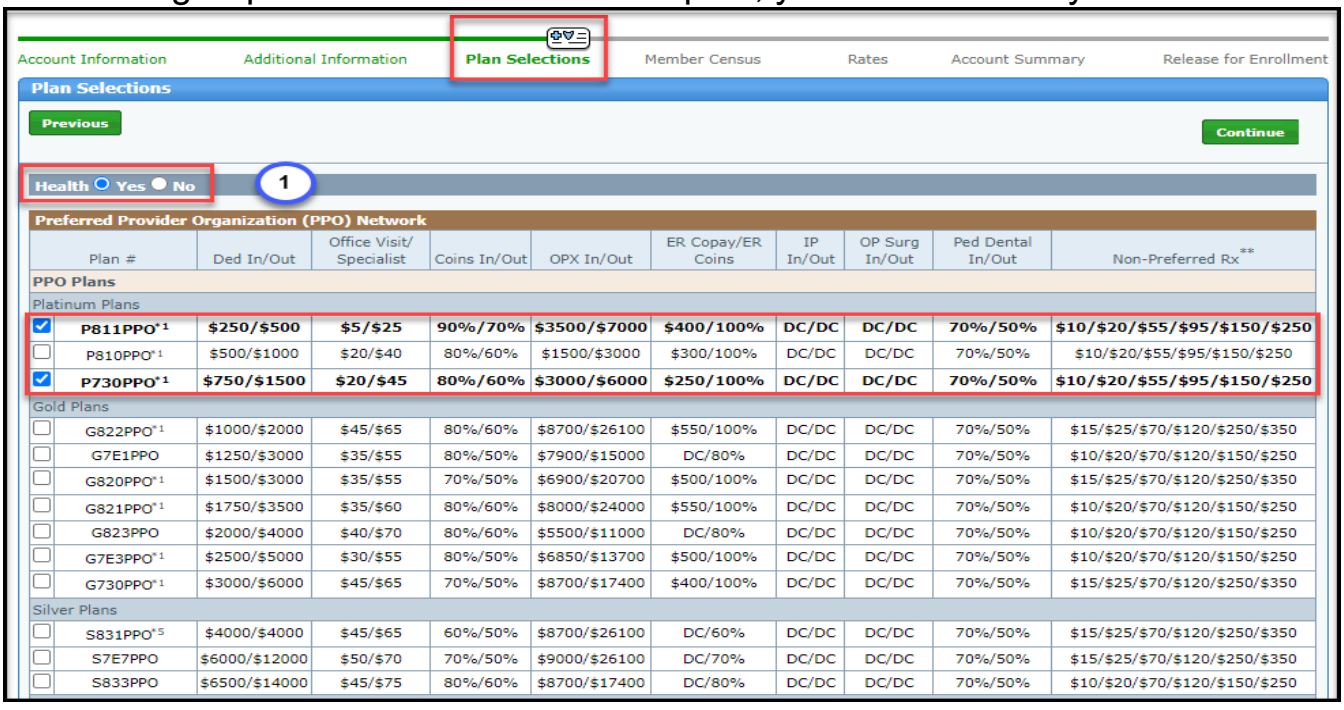


Now that you've entered additional information, you can select medical, dental, vision and ancillary plans for your group.

Notes: Medical plan pairing is available for groups 2-50

Step III: Plan Selections

1. On the **Plan Selections** screen, for Health, the **Yes** option will default. If the group has not elected a health plan, you must manually select **No.**



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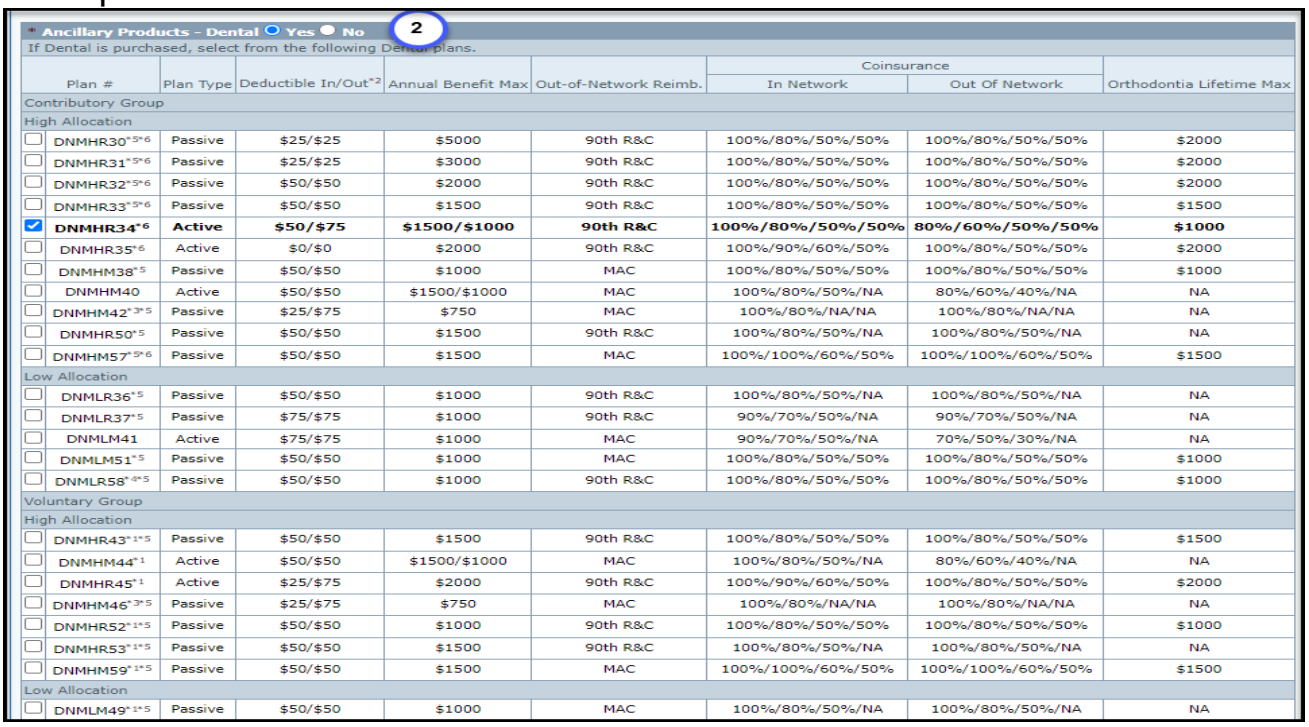
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

2. Ancillary Products: Dental radio button will default to **No**. When the **Yes** radio button is selected, the product selection fields will populate. Select the applicable dental plan.

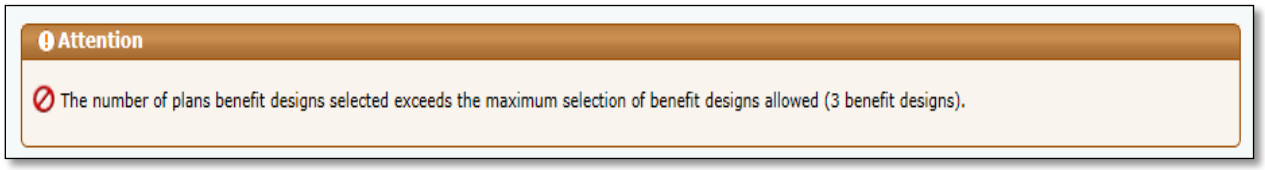


* Ancillary Products - Dental ◉ Yes ○ No (2)

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		Orthodontia Lifetime Max
					In Network	Out Of Network	
Contributory Group							
High Allocation							
☐ DNMHR30*5*6	Passive	$25/$25	$5000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$2000
☐ DNMHR31*5*6	Passive	$25/$25	$3000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$2000
☐ DNMHR32*5*6	Passive	$50/$50	$2000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$2000
☐ DNMHR33*5*6	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1500
☑ **DNMHR34*6**	**Active**	**$50/$75**	**$1500/$1000**	**90th R&C**	**100%/80%/50%/50%**	**80%/60%/50%/50%**	**$1000**
☐ DNMHR35*6	Active	$0/$0	$2000	90th R&C	100%/90%/60%/50%	100%/80%/50%/50%	$2000
☐ DNMHM38*5	Passive	$50/$50	$1000	MAC	100%/80%/50%/50%	100%/80%/50%/50%	$1000
☐ DNMHM40	Active	$50/$50	$1500/$1000	MAC	100%/80%/50%/NA	80%/60%/40%/NA	NA
☐ DNMHM42*3*5	Passive	$25/$75	$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
☐ DNMHR50*5	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
☐ DNMHM57*5*6	Passive	$50/$50	$1500	MAC	100%/100%/60%/50%	100%/100%/60%/50%	$1500
Low Allocation							
☐ DNMLR36*5	Passive	$50/$50	$1000	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
☐ DNMLR37*5	Passive	$75/$75	$1000	90th R&C	90%/70%/50%/NA	90%/70%/50%/NA	NA
☐ DNMLM41	Active	$75/$75	$1000	MAC	90%/70%/50%/NA	70%/50%/30%/NA	NA
☐ DNMLM51*5	Passive	$50/$50	$1000	MAC	100%/80%/50%/50%	100%/80%/50%/50%	$1000
☐ DNMLR58*4*5	Passive	$50/$50	$1000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1000
Voluntary Group							
High Allocation							
☐ DNMHR43*1*5	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1500
☐ DNMHM44*1	Active	$50/$50	$1500/$1000	MAC	100%/80%/50%/NA	80%/60%/40%/NA	NA
☐ DNMHR45*1	Active	$25/$75	$2000	90th R&C	100%/90%/60%/50%	100%/80%/50%/50%	$2000
☐ DNMHM46*3*5	Passive	$25/$75	$750	MAC	100%/80%/NA/NA	100%/80%/NA/NA	NA
☐ DNMHR52*1*5	Passive	$50/$50	$1000	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1000
☐ DNMHR53*1*5	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/NA	100%/80%/50%/NA	NA
☐ DNMHM59*1*5	Passive	$50/$50	$1500	MAC	100%/100%/60%/50%	100%/100%/60%/50%	$1500
Low Allocation							
☐ DNMLM49*1*5	Passive	$50/$50	$1000	MAC	100%/80%/50%/NA	100%/80%/50%/NA	NA

Note: Dual option dental pairings are only available for Groups with ten or more employees.



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

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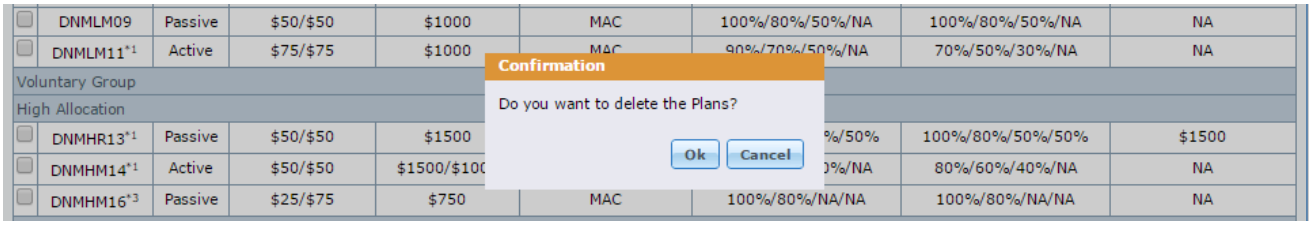
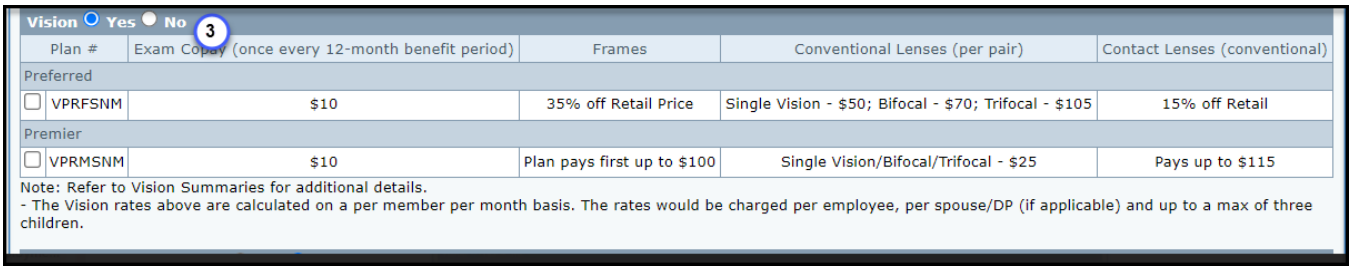
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)



For any of the plans, if the **Yes** radio button is selected and user changes the answer to **No** a message will appear 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 in any other category, it only collapses the section where **No** was selected.

3. When the **Yes** radio button is selected, the Vision plan options will populate. Select the applicable vision plan. If a group selects a Preferred or Premier vision plan, they must also be enrolling in a medical plan.



4. **Standalone Vision Plans:**

   - Radio button will default to **No**, if the group elects standalone vision, manually click on **Yes** to display the plans. Click on the requested plan.
   - Must also have Medical and/or Dental to purchase Standalone Vision.
   - Only 1 plan can be selected.

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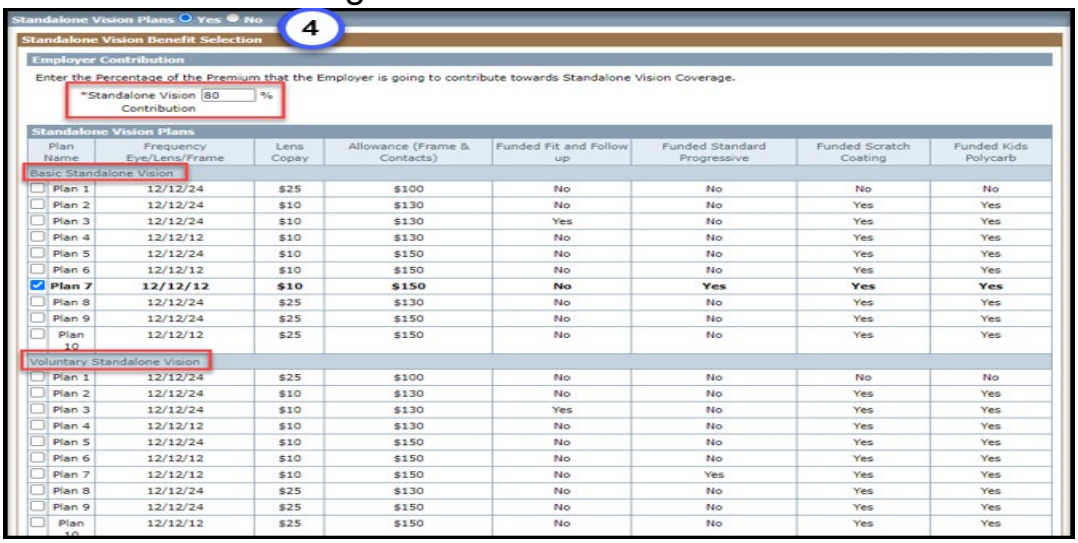
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

- Basic Standalone Vision plans must have an Employer Contribution amount of 80% or higher.
- Voluntary Standalone Vision plans must have an Employer Contribution amount of 79% or less.
- Participation Requirements for both Basic and Voluntary plans are 20% of the eligible employees or 2 members- whichever is greater- must be enrolled



5. **Life Section:**

- Life Plans radio button will default to **No**, if the group elects life, manually click on Yes to display the plans. Click on checkbox to select a plan.
- Must also have Medical and/or Dental in order to purchase Employee Basic Life Plan.
- Term Life Contribution: Any number 25 –100.

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2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

NOTE: If you enter a contribution amount under 100 **before** selecting a Life plan, the contribution will **auto-default** to blank upon plan selection. To adjust, go back and **manually re-enter** the desired contribution amount **after** selecting a Life plan

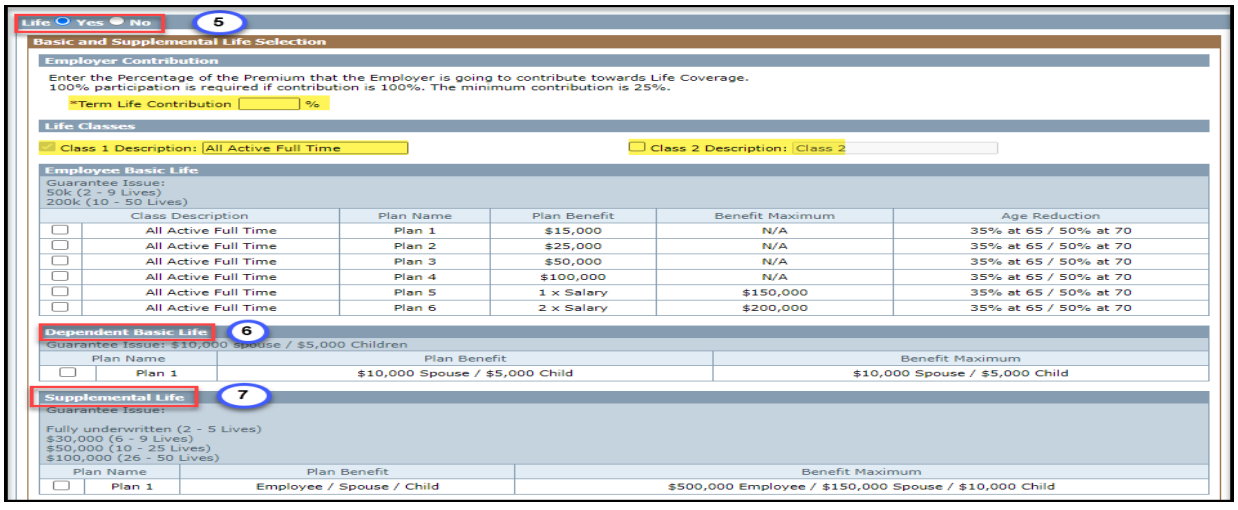
- If Employer Contribution amount is 100% then all eligible employees must be enrolled in the coverage.
- Class 1 Description: Default description is All Active Full Time, but can be updated with up to 20 characters
- Class 2 Description (Optional): User can type in the description for Class 2, with up to 20 characters; Class 2 plans will display for plan selection
- Only 1 plan can be selected per class

6. **Dependent Basic Life:**

- Dependent Basic Life plan can only be selected with a valid Employee Basic Life plan

7. **Supplemental Life:**

- Supplemental Life plan can only be selected with a valid Employee Basic Life plan



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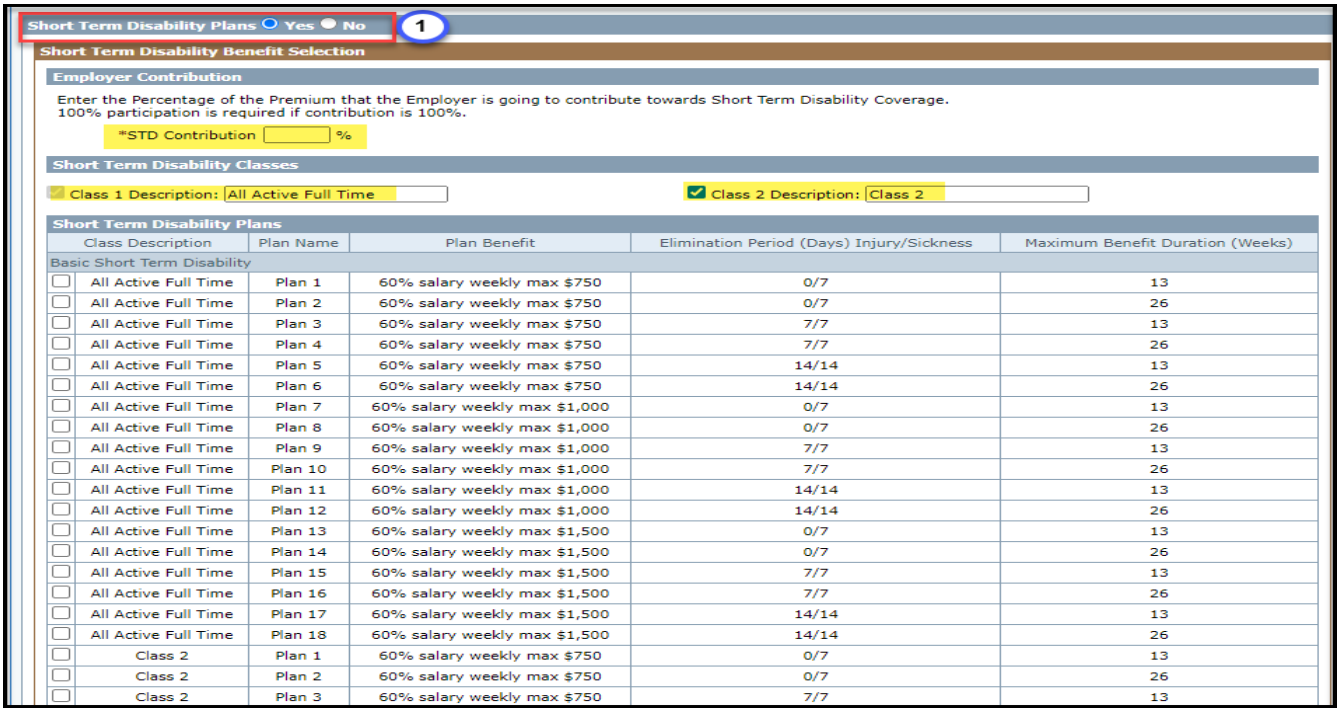
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

1. Short Term Disability Plans radio button will default to **No**, if the group elects Short Term Disability, manually click on Yes to display the plans. Click on the checkbox to select a plan.
    - Employer Contribution for Basic Short-Term Disability should be 25% or more.
    - Participation Requirement for Basic plans is at least 75% of the eligible employees must be enrolled in the coverage.
    - Class 1 Description: Default description is All Active Full Time, but can be updated with up to 20 characters
    - Class 2 Description: User can type in the description for Class 2, with up to 20 characters; Class 2 plans will display for plan selection.
    - Only 1 plan can be selected per class



Class Description	Plan Name	Plan Benefit	Elimination Period (Days) Injury/Sickness	Maximum Benefit Duration (Weeks)
Basic Short Term Disability				
All Active Full Time	Plan 1	60% salary weekly max $750	0/7	13
All Active Full Time	Plan 2	60% salary weekly max $750	0/7	26
All Active Full Time	Plan 3	60% salary weekly max $750	7/7	13
All Active Full Time	Plan 4	60% salary weekly max $750	7/7	26
All Active Full Time	Plan 5	60% salary weekly max $750	14/14	13
All Active Full Time	Plan 6	60% salary weekly max $750	14/14	26
All Active Full Time	Plan 7	60% salary weekly max $1,000	0/7	13
All Active Full Time	Plan 8	60% salary weekly max $1,000	0/7	26
All Active Full Time	Plan 9	60% salary weekly max $1,000	7/7	13
All Active Full Time	Plan 10	60% salary weekly max $1,000	7/7	26
All Active Full Time	Plan 11	60% salary weekly max $1,000	14/14	13
All Active Full Time	Plan 12	60% salary weekly max $1,000	14/14	26
All Active Full Time	Plan 13	60% salary weekly max $1,500	0/7	13
All Active Full Time	Plan 14	60% salary weekly max $1,500	0/7	26
All Active Full Time	Plan 15	60% salary weekly max $1,500	7/7	13
All Active Full Time	Plan 16	60% salary weekly max $1,500	7/7	26
All Active Full Time	Plan 17	60% salary weekly max $1,500	14/14	13
All Active Full Time	Plan 18	60% salary weekly max $1,500	14/14	26
Class 2	Plan 1	60% salary weekly max $750	0/7	13
Class 2	Plan 2	60% salary weekly max $750	0/7	26
Class 2	Plan 3	60% salary weekly max $750	7/7	13

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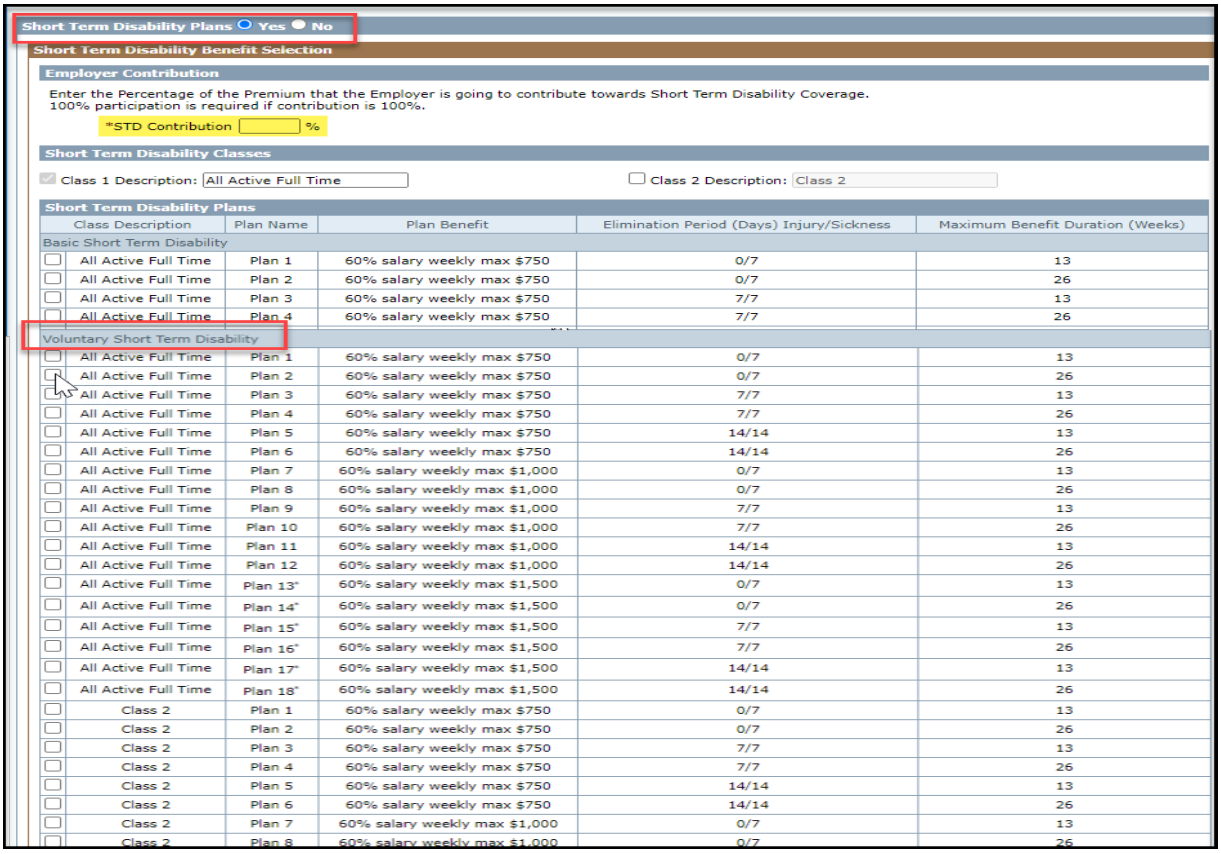
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

Voluntary Short Term Disability

- Employer Contribution for Voluntary Short Term Disability plans cannot be above 24%



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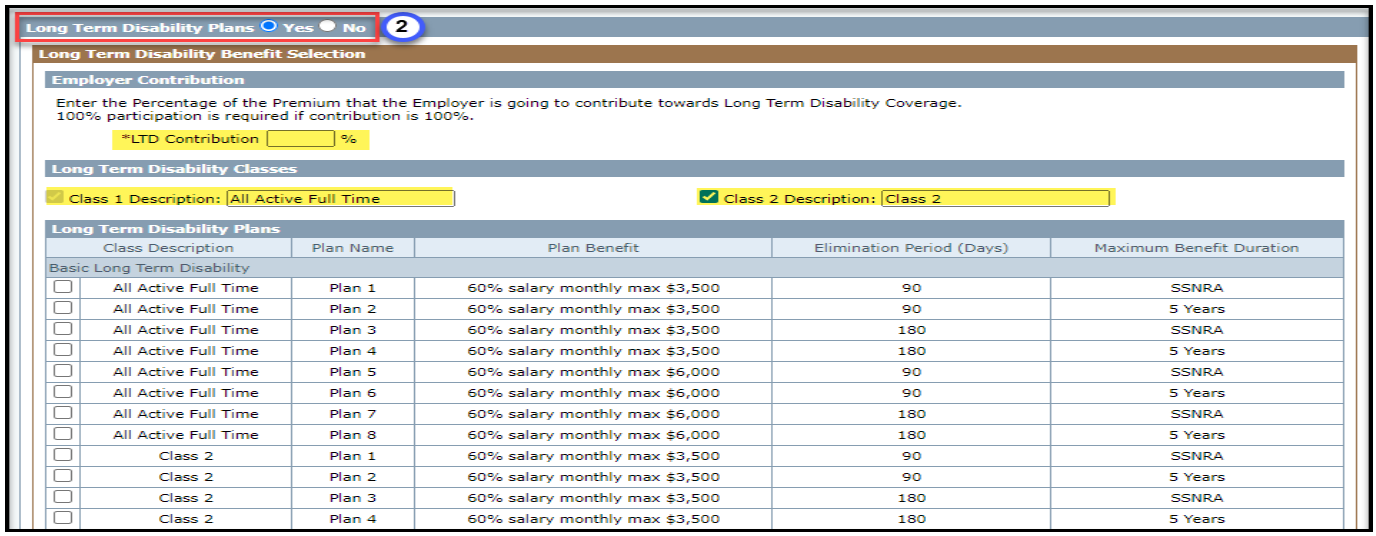
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

2. Long Term Disability Contribution radio button will default to **No**, if the group elects Long Term Disability, manually click on Yes to display the plans. Click on the checkbox to select a plan.
    - Employer Contribution for Basic Long Term Disability plans cannot be below 25%
    - Participation Requirement for Basic plans is at least 75% of the eligible employees must be enrolled in the coverage.
    - Class 1 Description: Default description is All Active Full Time, but can be updated with up to 20 characters
    - Class 2 Description: User can type in the description for Class 2, with up to 20 characters; Class 2 plans will display for plan selection.
    - Only 1 plan can be selected per class



Class Description	Plan Name	Plan Benefit	Elimination Period (Days)	Maximum Benefit Duration
Basic Long Term Disability				
All Active Full Time	Plan 1	60% salary monthly max $3,500	90	SSNRA
All Active Full Time	Plan 2	60% salary monthly max $3,500	90	5 Years
All Active Full Time	Plan 3	60% salary monthly max $3,500	180	SSNRA
All Active Full Time	Plan 4	60% salary monthly max $3,500	180	5 Years
All Active Full Time	Plan 5	60% salary monthly max $6,000	90	SSNRA
All Active Full Time	Plan 6	60% salary monthly max $6,000	90	5 Years
All Active Full Time	Plan 7	60% salary monthly max $6,000	180	SSNRA
All Active Full Time	Plan 8	60% salary monthly max $6,000	180	5 Years
Class 2	Plan 1	60% salary monthly max $3,500	90	SSNRA
Class 2	Plan 2	60% salary monthly max $3,500	90	5 Years
Class 2	Plan 3	60% salary monthly max $3,500	180	SSNRA
Class 2	Plan 4	60% salary monthly max $3,500	180	5 Years

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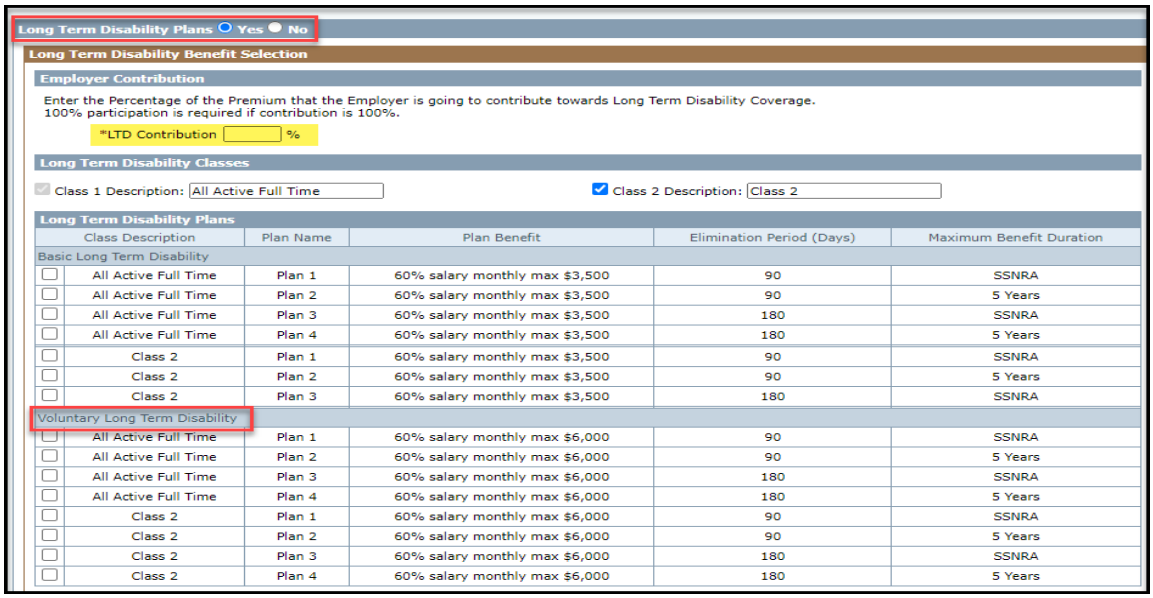
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

Voluntary Long Term Disability:

- Employer Contribution for Voluntary Long Term Disability plans cannot be above 24%



3. Critical Illness Plans radio button will default to **No**, if the group elects Critical Illness, manually click on Yes to display the plans. Click on the appropriate box to select a plan.
    - Must also have Medical and/ or Dental to purchase Critical Illness
    - Only 1 plan can be selected.
    - Basic Critical Illness plans must have an Employer Contribution amount of 25% or higher.
    - Voluntary Critical Illness plans must have an Employer Contribution amount of 24% or less.
    - Participation Requirement for Basic plans is at least 75% of the eligible employees must be enrolled in the coverage.

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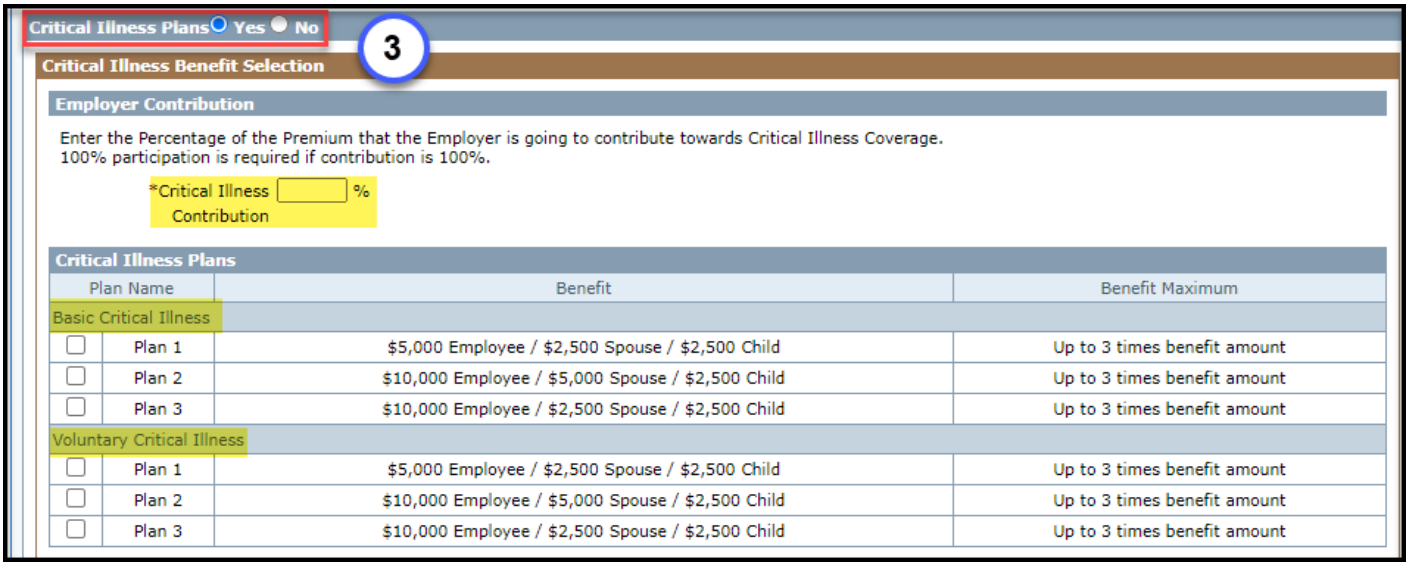
2 How to Enroll a Small Group (Cont'd.)

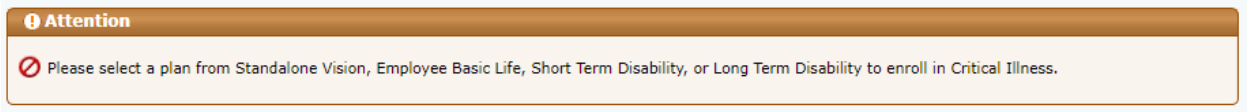
III. Plan Selections (Cont'd.)

- Participation Requirement for Voluntary plans is at least 25% of the eligible employees must be enrolled in the coverage.
- If Employer Contribution amount is 100% then all eligible employees must be enrolled in the coverage.

Note: To purchase Critical Illness, the employer must also elect Standalone Vision, Employee Basic Life, Long Term Disability or Short Term Disability.



If Critical Illness is selected without an additional ancillary line, then an error message will populate



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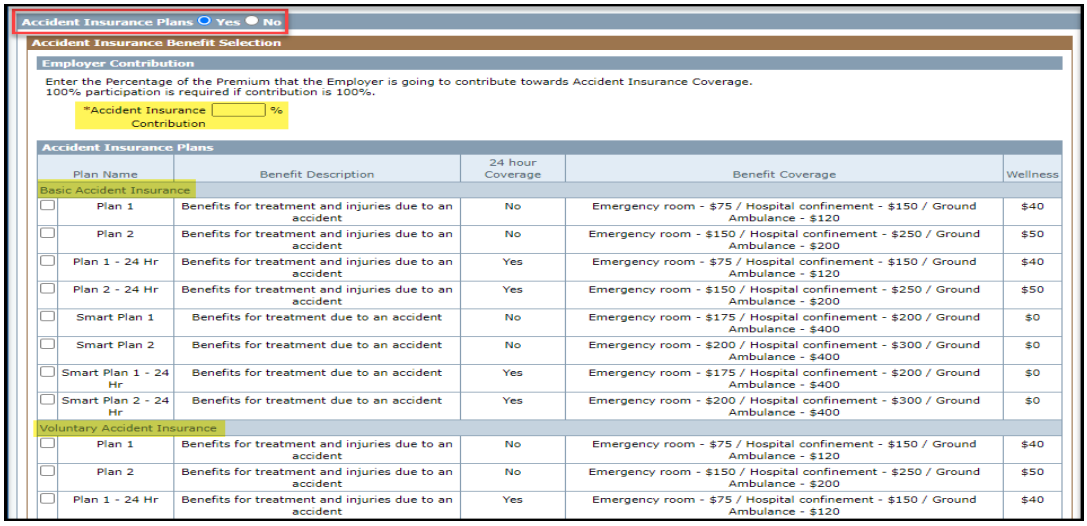
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

3. **Accident Insurance Plan:** Radio button will default to **No**, if the group elects an Accident insurance plan, manually click on **Yes** to display the plans. Click on the appropriate box to select a plan.

- Must also have Medical and/or Dental to purchase Accident Insurance
- Only 1 plan can be selected.
- Basic Accident Insurance plans must have an Employer Contribution amount of 25% or higher.
- Voluntary Accident Insurance plans must have an Employer Contribution amount of 24% or less.
- Participation Requirement for Basic plans is at least 75% of the eligible employees must be enrolled in the coverage.
- Participation Requirement for Voluntary plans is at least 25% of the eligible employees must be enrolled in the coverage.
- If Employer Contribution amount is 100% then all eligible employees must be enrolled in the coverage.



Accident Insurance Plans ○ Yes ○ No

Accident Insurance Benefit Selection

Employer Contribution

Enter the Percentage of the Premium that the Employer is going to contribute towards Accident Insurance Coverage.
100% participation is required if contribution is 100%.

*Accident Insurance Contribution ____ %

Accident Insurance Plans

Plan Name	Benefit Description	24 hour Coverage	Benefit Coverage	Wellness
Basic Accident Insurance				
Plan 1	Benefits for treatment and injuries due to an accident	No	Emergency room - $75 / Hospital confinement - $150 / Ground Ambulance - $120	$40
Plan 2	Benefits for treatment and injuries due to an accident	No	Emergency room - $150 / Hospital confinement - $250 / Ground Ambulance - $200	$50
Plan 1 - 24 Hr	Benefits for treatment and injuries due to an accident	Yes	Emergency room - $75 / Hospital confinement - $150 / Ground Ambulance - $120	$40
Plan 2 - 24 Hr	Benefits for treatment and injuries due to an accident	Yes	Emergency room - $150 / Hospital confinement - $250 / Ground Ambulance - $200	$50
Smart Plan 1	Benefits for treatment due to an accident	No	Emergency room - $175 / Hospital confinement - $200 / Ground Ambulance - $400	$0
Smart Plan 2	Benefits for treatment due to an accident	No	Emergency room - $200 / Hospital confinement - $300 / Ground Ambulance - $400	$0
Smart Plan 1 - 24 Hr	Benefits for treatment due to an accident	Yes	Emergency room - $175 / Hospital confinement - $200 / Ground Ambulance - $400	$0
Smart Plan 2 - 24 Hr	Benefits for treatment due to an accident	Yes	Emergency room - $200 / Hospital confinement - $300 / Ground Ambulance - $400	$0
Voluntary Accident Insurance				
Plan 1	Benefits for treatment and injuries due to an accident	No	Emergency room - $75 / Hospital confinement - $150 / Ground Ambulance - $120	$40
Plan 2	Benefits for treatment and injuries due to an accident	No	Emergency room - $150 / Hospital confinement - $250 / Ground Ambulance - $200	$50
Plan 1 - 24 Hr	Benefits for treatment and injuries due to an accident	Yes	Emergency room - $75 / Hospital confinement - $150 / Ground Ambulance - $120	$40

Note: To purchase Accident Insurance, the employer must also elect Standalone Vision, Employee Basic Life, Long Term Disability or Short Term Disability.

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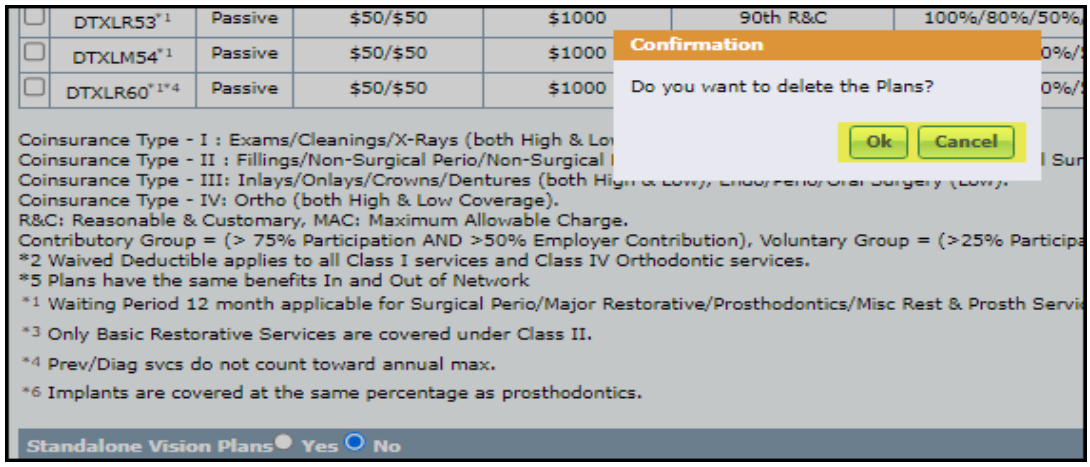
2 How to Enroll a Small Group (Cont'd.)

III. Plan Selections (Cont'd.)

When **No** is selected to delete a plan, a confirmation message will populate asking if you want to delete the plans.



4. Click **Continue** to proceed to the **Member Census** screen.

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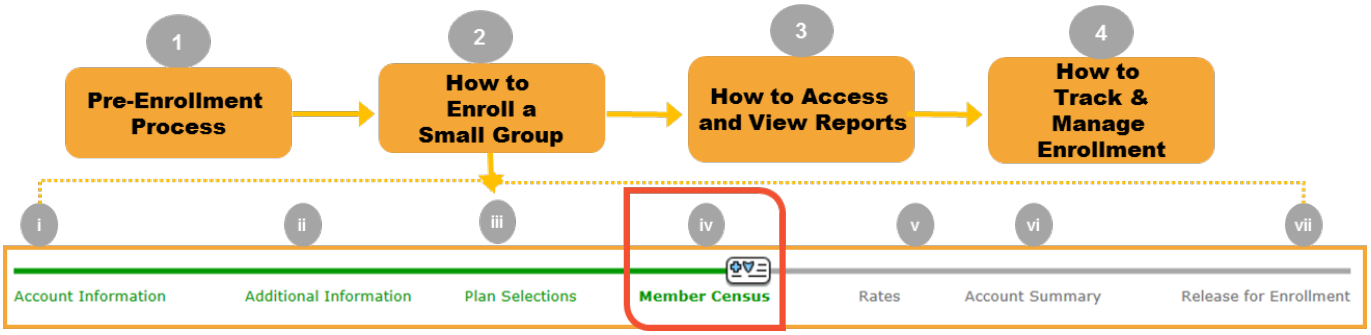
2 How to Enroll a Small Group (Cont'd.)

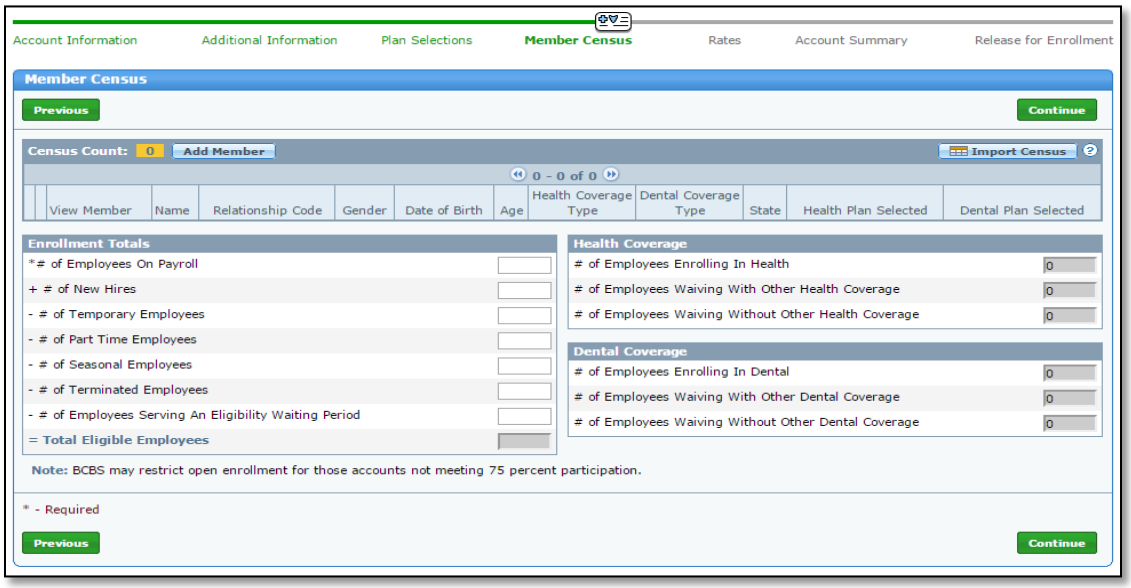
IV. Member Census



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.

Note: Only fields with asterisks are mandatory. Other fields should be completed, if applicable.



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

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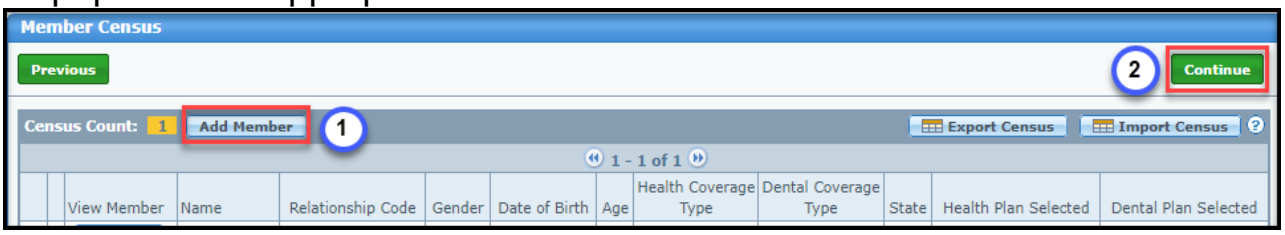
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)

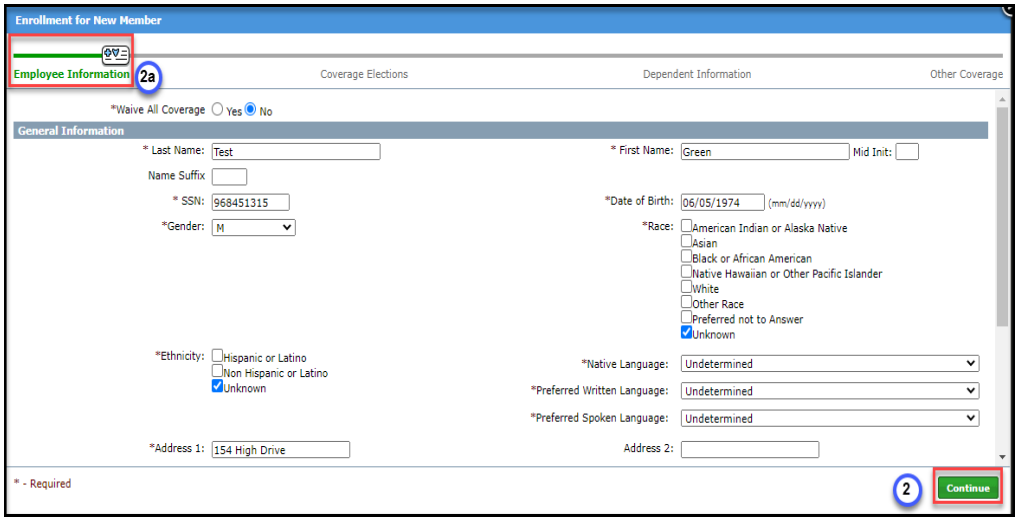
The steps below will walk you through how to manually enter member census.

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 and Other Coverage. As members are added, the census count will auto-populate the appropriate number of rows.



- **2a: Employee Information:** General census information regarding the employee. The **Employee Signature Date** field is also in this section.



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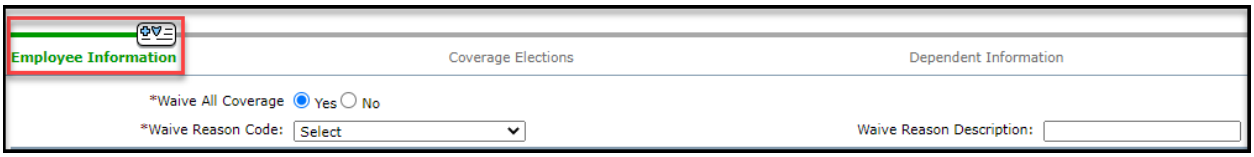
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)

Add Member: Enrollment for New Member

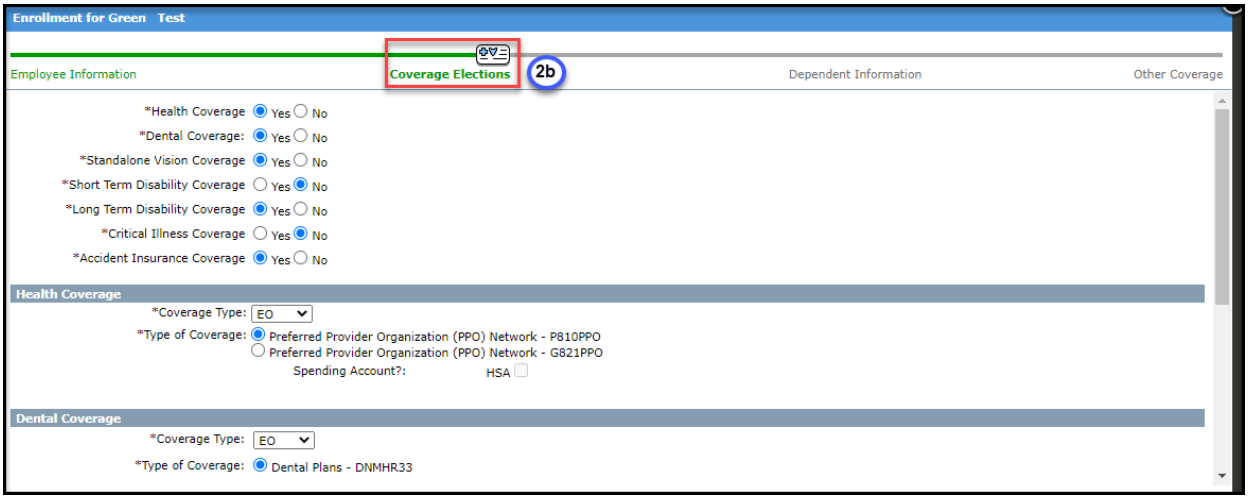
- **Employee Information:** The Waiver information is also included in this section. You will have minimal data entry if a member waives all coverage. You are required to enter the Waive Reason Code, Name, and Signature Date.



- **2b: Coverage Elections**: Select Health, Dental and Ancillary product options at the member level.

Note: When HMO or EPO coverage is elected, additional fields will become visible to enter the PCP information.

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



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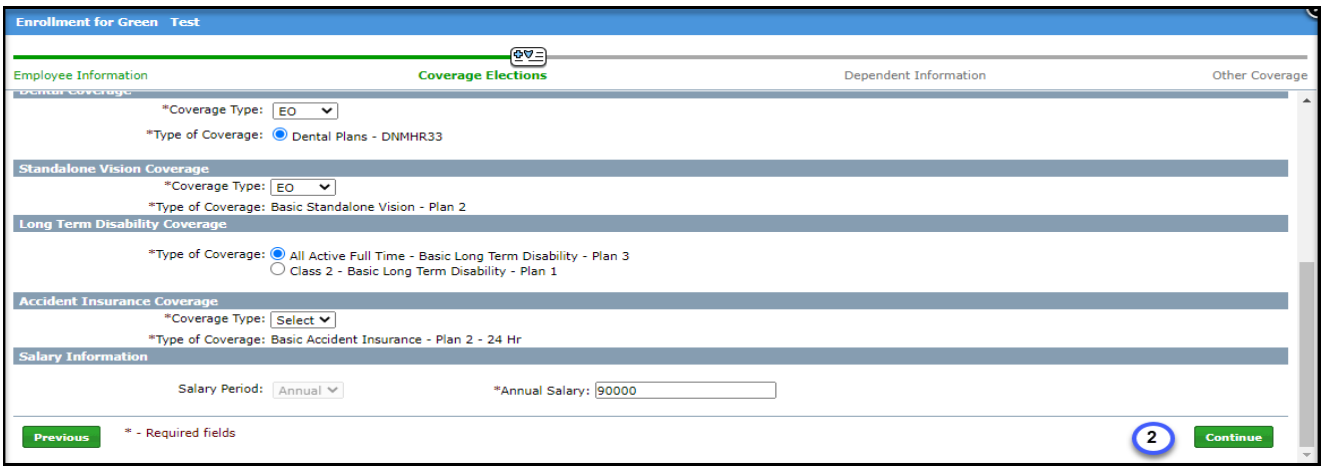
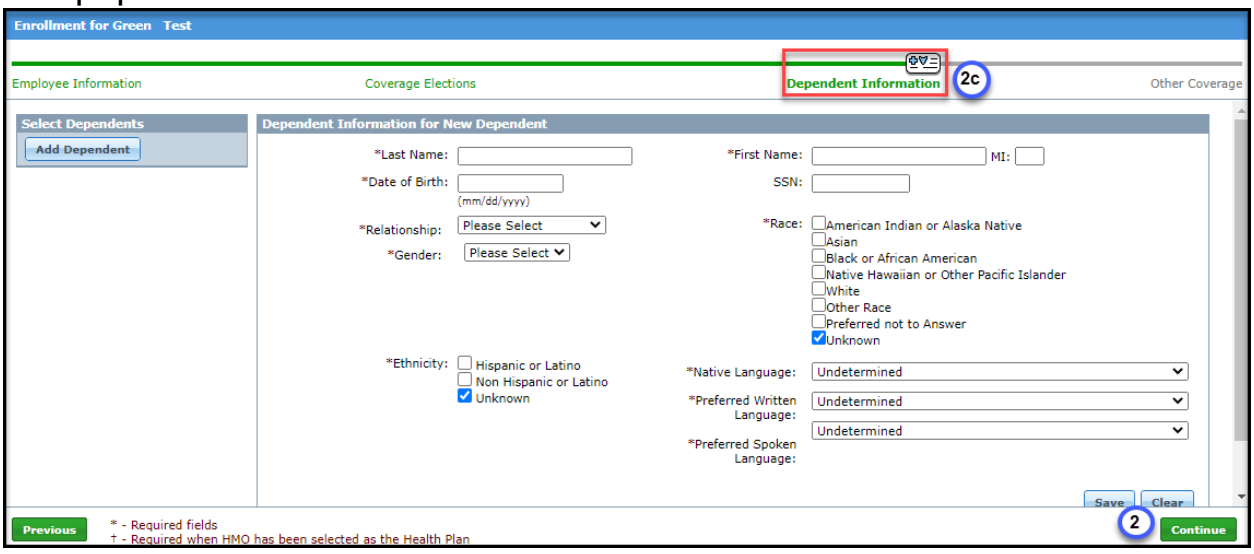
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)



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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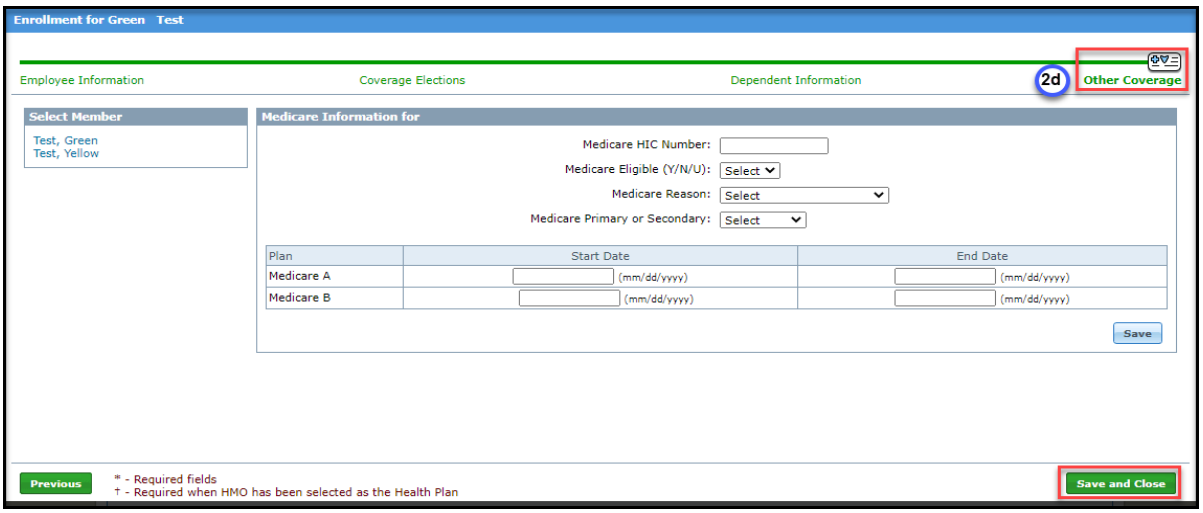
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)

Add Member: Enrollment for New Member

- **2d: Other Coverage:** Any applicable Medicare information for both the employee and dependent are entered here. When the member's name is selected, additional Medicare information fields will populate.

Enter the information and then click **Save** and **Close**.



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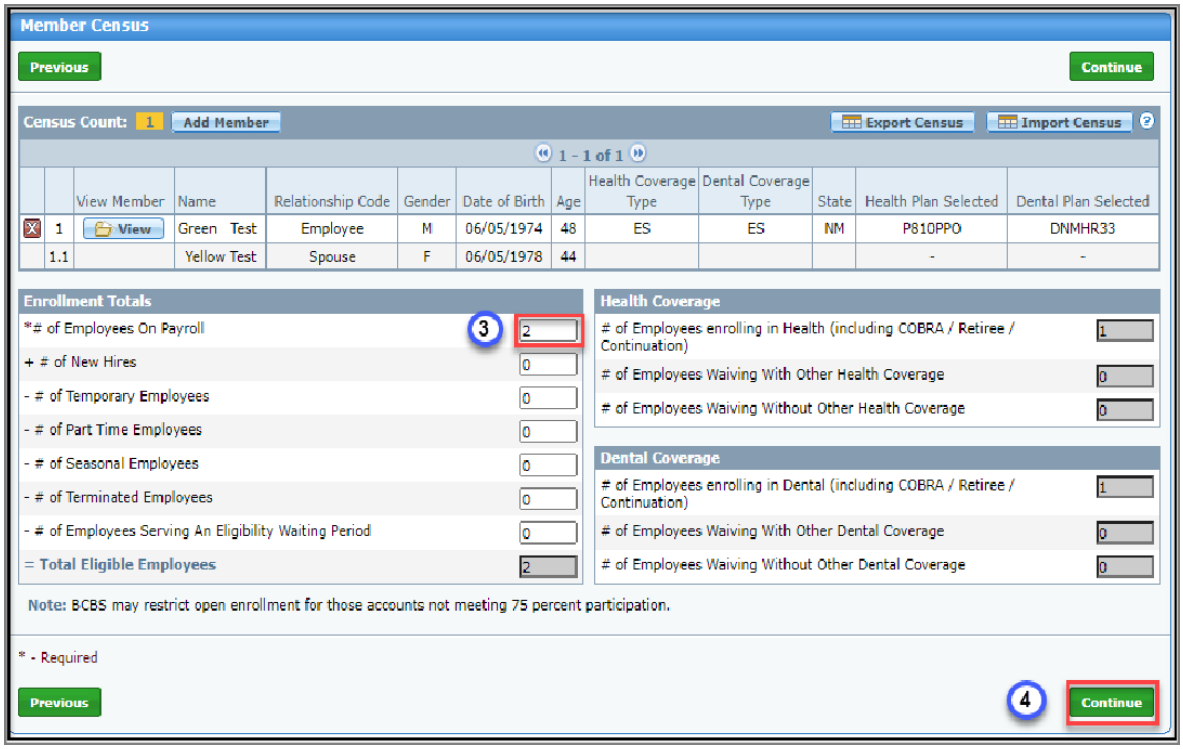
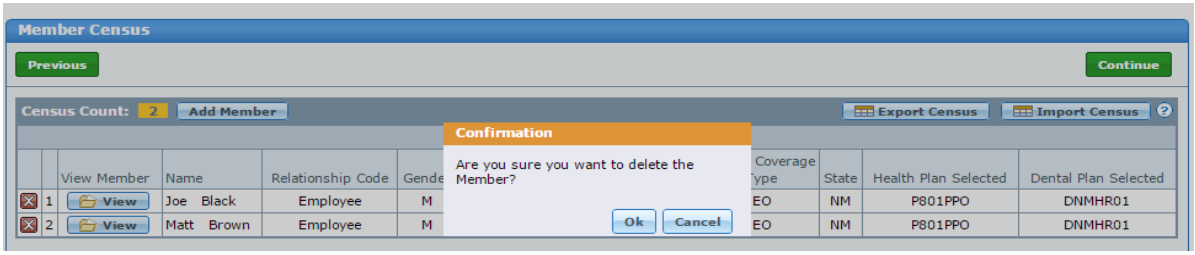
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)



3. On the Member Census screen, 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.



Notes:

- Members can be deleted by clicking the red 'x'.

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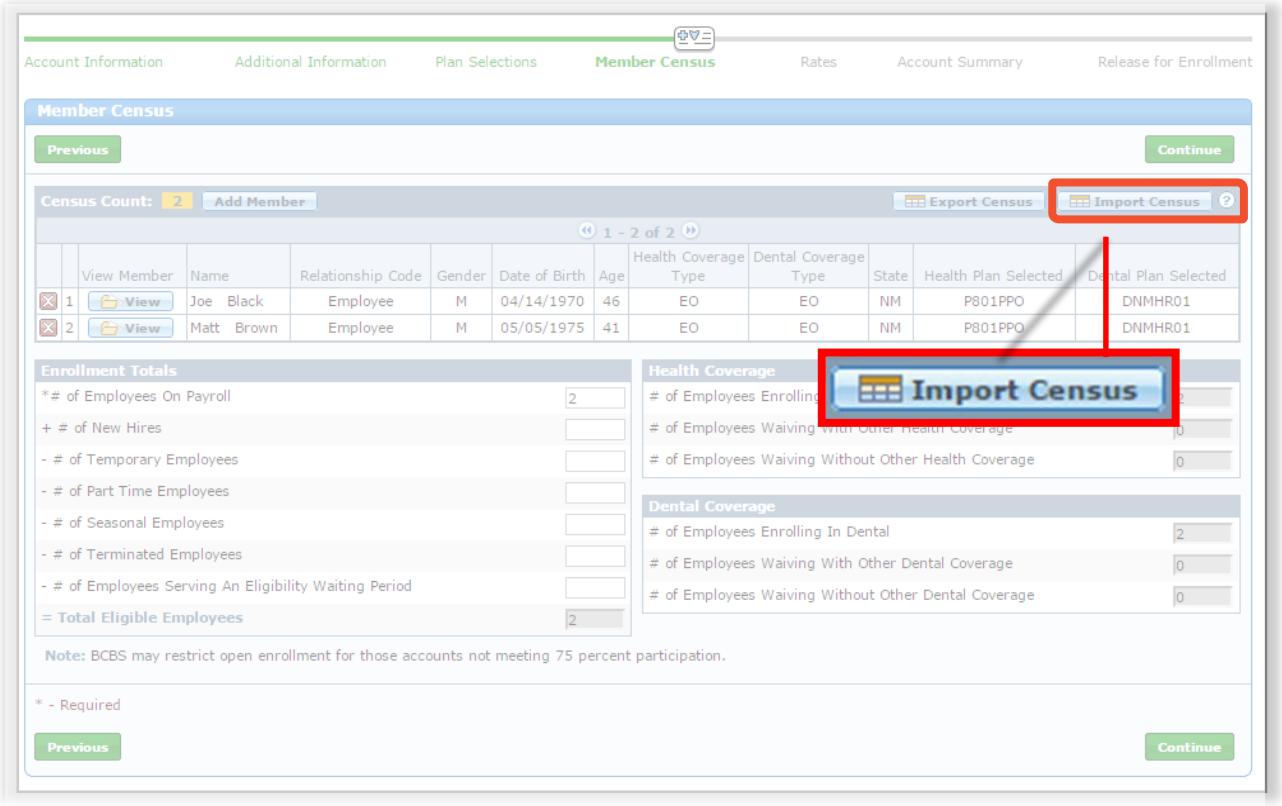
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)



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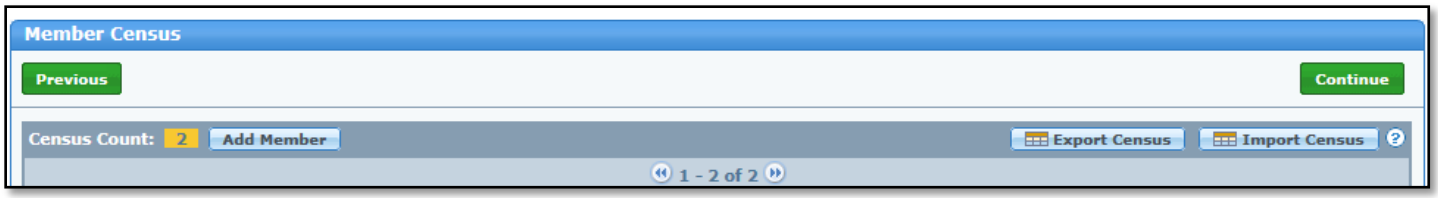
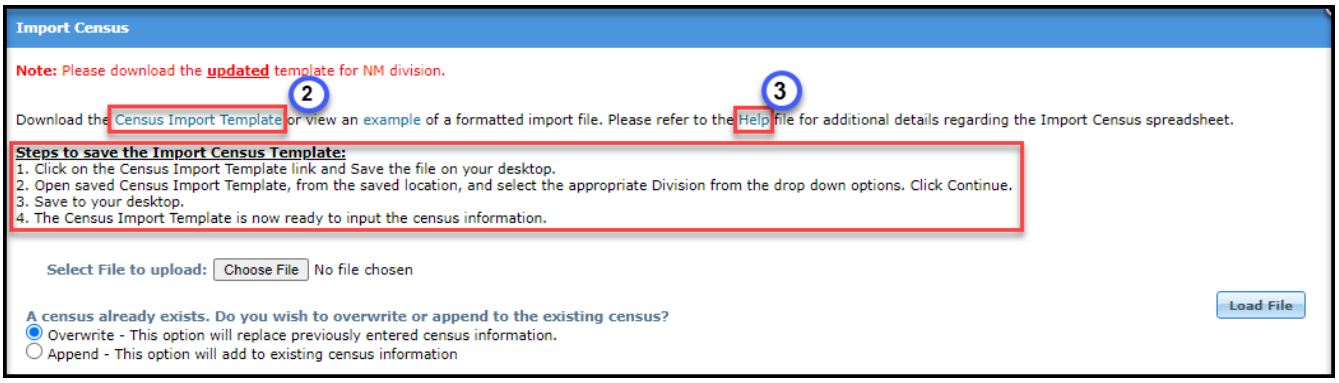
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)

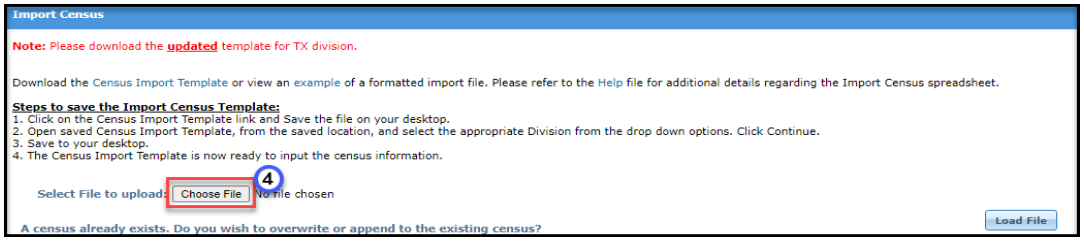


Step IV: Member Census (Import Census) (Smart Census)

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.
3. For additional Import Census spreadsheet details, click on the help button.



4. Click on the Choose File link to upload a saved census file.



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.

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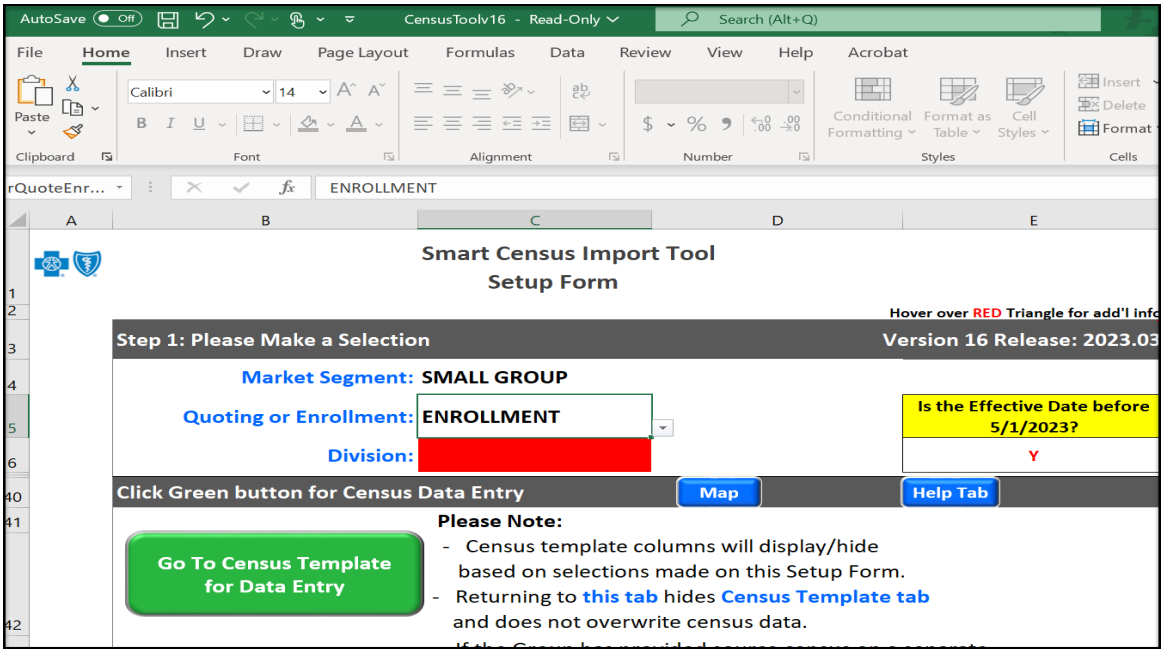
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)

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

A. Open Smart Census Import Tool (SCIT) and save under the Group's Name.
B. Complete Census Template Setup form.
C. Enter data in Import Census Template tab.
D. Click File Save to validate data.
E. An Error List will be generated. Correct errors and click File Save to re-validate data.
F. Upon successful validation, upload SCIT to Small Group Enrollment Tool.



For more information, please refer to the Smart Census Import Tool Detailed Reference Guide.

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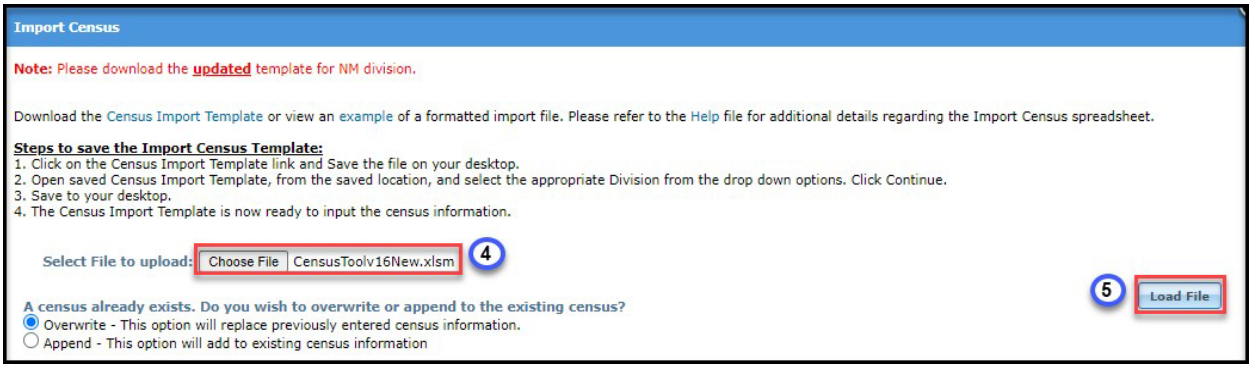
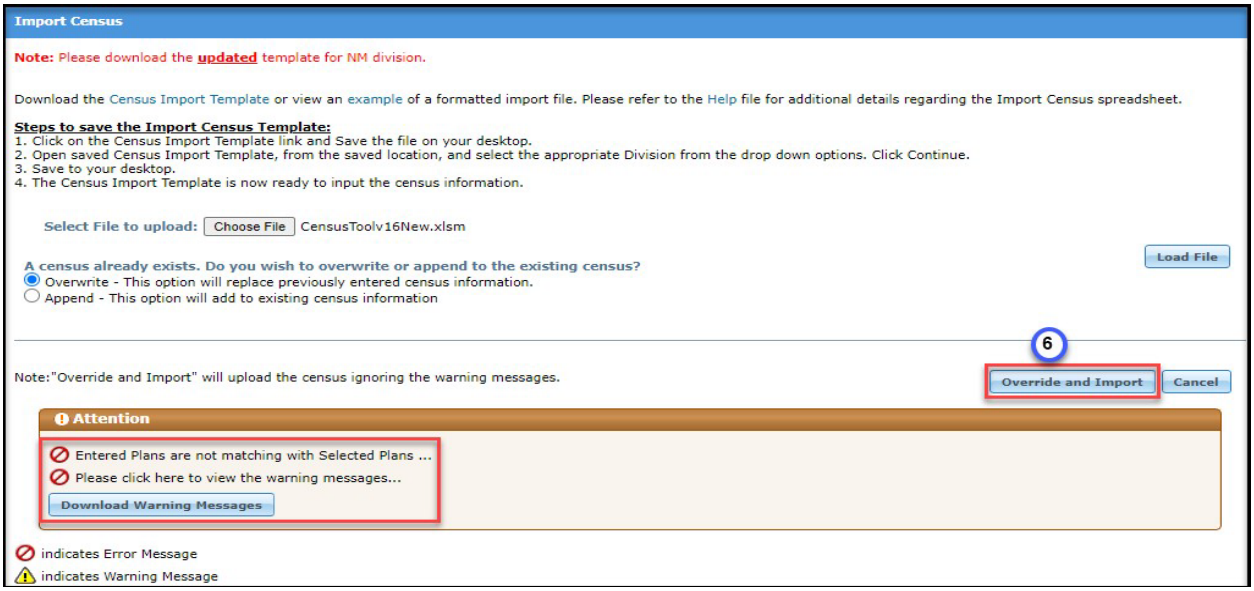
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)



4. Click **Choose File** and select the appropriate file.
5. Click **Load File**. If there is missing information in the uploaded census template, an **Attention message** is displayed.
6. Click **Override and Import**.



Note: The Import Census pop-up window includes a clarification for Override and Import upload option. A legend key for warning and error symbols is also displayed.

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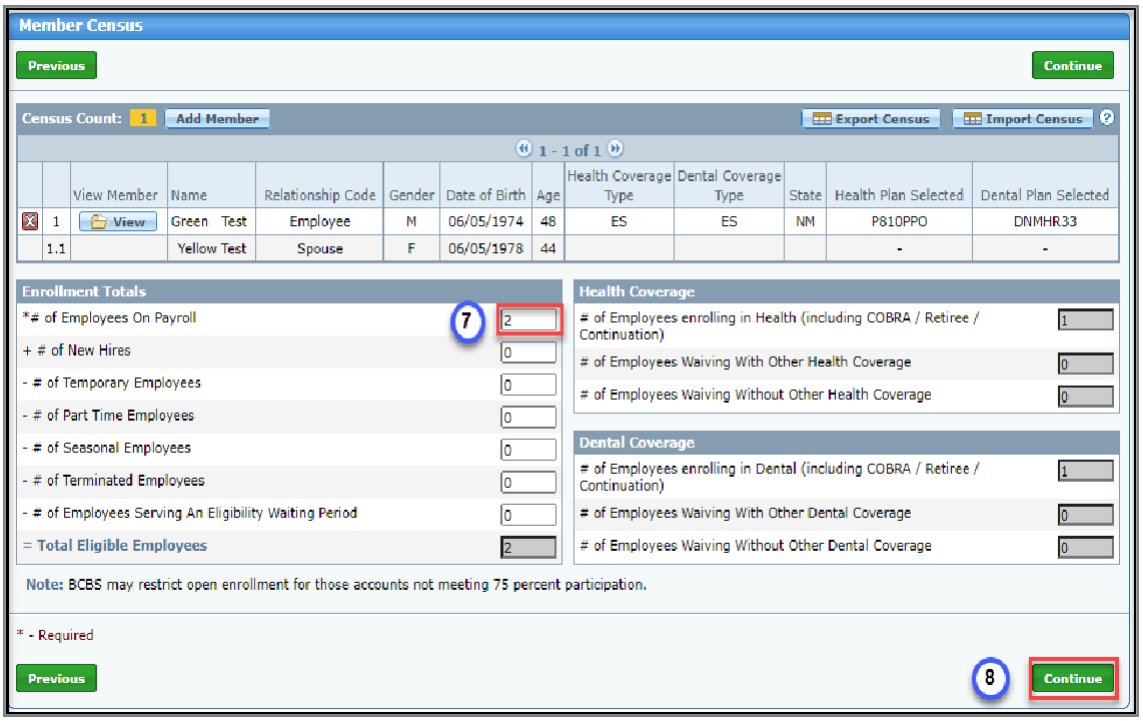
2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)



7. The census information will automatically populate into the **Member Census** page. Enter the # of Employees on Payroll.

8. Click **Continue** to proceed to the **Rates** screen.

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2 How to Enroll a Small Group (Cont'd.)

IV. Member Census (Cont'd.)

1. New census template will not work with Excel 2009 and older version. Please use the import census template or enter census in 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 **SCIT**, you will be prompted to enter group name. This entry is used to save the file under the group's name along with date and time stamp. The original **SCIT** file remains intact. For next group's census, open the original **SCIT** file.
4. Entire cell will be highlighted in Red for required entry and if a value is invalid, the cells will be highlighted in Yellow.
5. If you are typing in data, value will be validated on Enter. An error message displays with Retry and Cancel button. Retry, will return you to the cell for edit and Cancel will wipe out the typed value
6. Before copying from an external source and pasting data onto **SCIT**, please make sure the source format matches to the required format for the **SCIT** 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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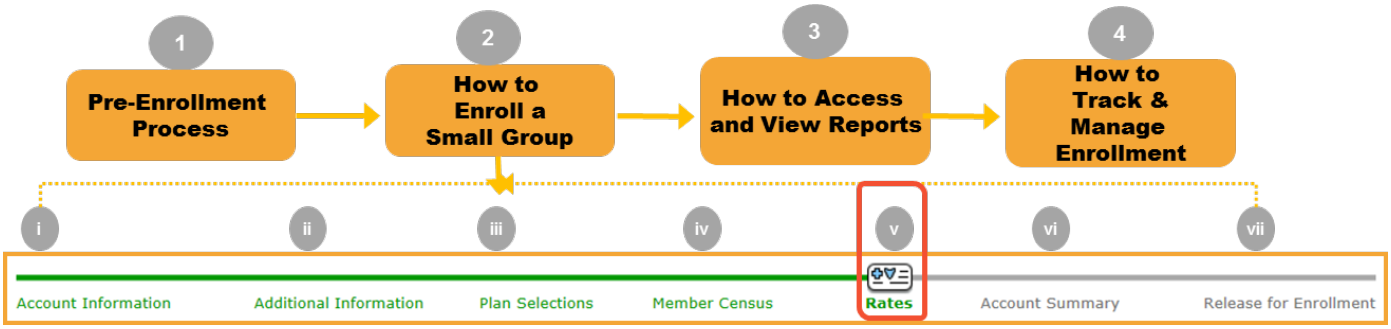
2 How to Enroll a Small Group (Cont'd.)

V. Rates



You have entered the Member Census. Next, you will view rates for your group. **No data entry is required on this screen**.

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

Rates

Previous | Continue

Rating Model

Member Level **A**

Preferred Provider Organization (PPO) Network

Plan #	Ded In/Out	Office Visit/ Specialist	Coins In/Out	OPX In/Out	ER Copay/ER Coins	IP In/Out	OP Surg In/Out	Ped Dental In/Out	Non-Preferred Rx**	Rates
PPO Plans										
Platinum Plans										
P810PPO*1	$500/$1000	$20/$40	80%/60%	$1500/$3000	$300/100%	DC/DC	DC/DC	70%/50%	$10/$20/$55/$95/$150/$250	
Gold Plans										
G821PPO*1	$1750/$3500	$35/$60	80%/60%	$8000/$24000	$550/100%	DC/DC	DC/DC	70%/50%	$10/$20/$70/$120/$150/$250	

Dental Plans

Plan #	Plan Type	Deductible In/Out*2	Annual Benefit Max	Out-of-Network Reimb.	Coinsurance		Orthodontia Lifetime Max	Rates
					In Network	Out Of Network		
Contributory Group								
High Allocation								
DNMHR33*5*6	Passive	$50/$50	$1500	90th R&C	100%/80%/50%/50%	100%/80%/50%/50%	$1500	

Vision Plans

Plan #	Exam Copay (once every 12-month benefit period)	Frames	Conventional Lenses (per pair)	Contact Lenses (conventional)	Per Member Per Month Rate n	Total Monthly Vision Cost
Preferred						
VPRFSNM	$10	35% off Retail Price	Single Vision - $50; Bifocal - $70; Trifocal - $105	15% off Retail	$0.37	$8.51

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2 How to Enroll a Small Group (Cont'd.)

V. Rates (Cont'd)

Standalone Vision Plans

Plan Name	Frequency Eye/Lens/Frame	Lens Copay	Allowance (Frame & Contacts)	Funded Fit and Follow up	Funded Standard Progressive	Funded Scratch Coating	Funded Kids Polycarb	Rates
Basic Standalone Vision								
Plan 2	12/12/24	$10	$130	No	No	Yes	Yes	

Short Term Disability Plans

Class Description	Plan Name	Plan Benefit	Elimination Period (Days) Injury/Sickness	Maximum Benefit Duration (Weeks)	Rates
Basic Short Term Disability					
All Active Full Time	Plan 2	60% salary weekly max $750	0/7	26	
Class 2	Plan 7	60% salary weekly max $1,000	0/7	13	

Long Term Disability Plans

Class Description	Plan Name	Plan Benefit	Elimination Period (Days)	Maximum Benefit Duration	Rates
Basic Long Term Disability					
All Active Full Time	Plan 3	60% salary monthly max $3,500	180	SSNRA	
Class 2	Plan 1	60% salary monthly max $3,500	90	SSNRA	

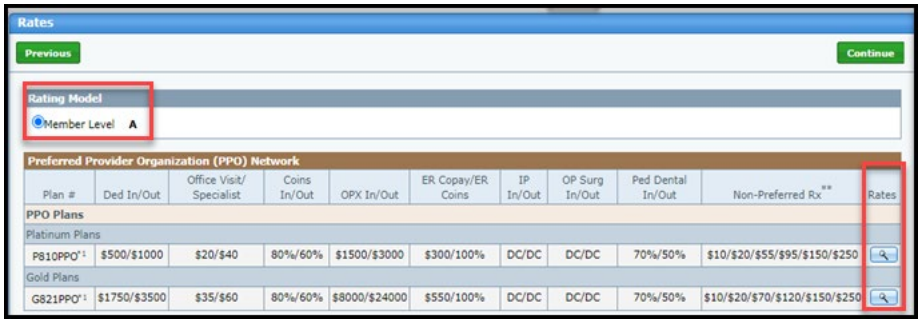
Critical Illness Plans

Plan Name	Benefit	Benefit Maximum	Rates
Basic Critical Illness			
Plan 2	$10,000 Employee / $5,000 Spouse / $2,500 Child	Up to 3 times benefit amount	

Accident Insurance Plans

Plan Name	Benefit Description	24 hour Coverage	Benefit Coverage	Wellness	Rates
Basic Accident Insurance					
Plan 2 - 24 Hr	Benefits for treatment and injuries due to an accident	Yes	Emergency room - $150 / Hospital confinement - $250 / Ground Ambulance - $200	$50	

1. Rating Model defaults as **member Level**. To view the rate, click on the magnifying glass icon.



Note: Some ancillary lines may show composite rates regardless of the rating model.

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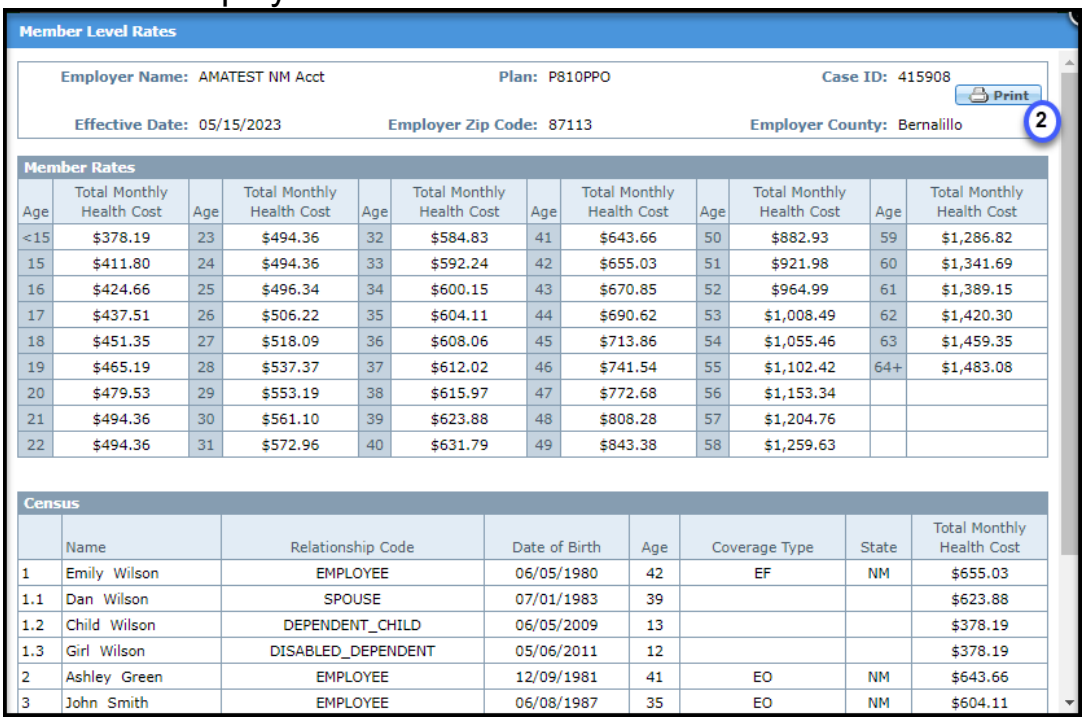
2 How to Enroll a Small Group (Cont'd.)

V. Rates (Cont'd)

The Rates are displayed.



Member Level Rates

Employer Name: AMATEST NM Acct Plan: P810PPO Case ID: 415908 Print

Effective Date: 05/15/2023 Employer Zip Code: 87113 Employer County: Bernalillo 2

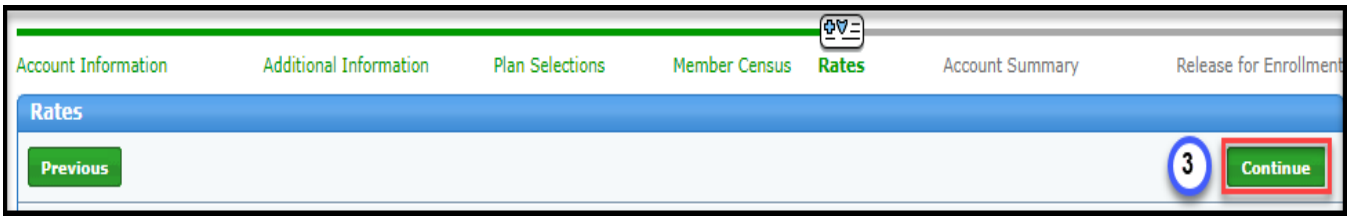
Member Rates

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
<15	$378.19	23	$494.36	32	$584.83	41	$643.66	50	$882.93	59	$1,286.82
15	$411.80	24	$494.36	33	$592.24	42	$655.03	51	$921.98	60	$1,341.69
16	$424.66	25	$496.34	34	$600.15	43	$670.85	52	$964.99	61	$1,389.15
17	$437.51	26	$506.22	35	$604.11	44	$690.62	53	$1,008.49	62	$1,420.30
18	$451.35	27	$518.09	36	$608.06	45	$713.86	54	$1,055.46	63	$1,459.35
19	$465.19	28	$537.37	37	$612.02	46	$741.54	55	$1,102.42	64+	$1,483.08
20	$479.53	29	$553.19	38	$615.97	47	$772.68	56	$1,153.34		
21	$494.36	30	$561.10	39	$623.88	48	$808.28	57	$1,204.76		
22	$494.36	31	$572.96	40	$631.79	49	$843.38	58	$1,259.63		

Census

	Name	Relationship Code	Date of Birth	Age	Coverage Type	State	Total Monthly Health Cost
1	Emily Wilson	EMPLOYEE	06/05/1980	42	EF	NM	$655.03
1.1	Dan Wilson	SPOUSE	07/01/1983	39			$623.88
1.2	Child Wilson	DEPENDENT_CHILD	06/05/2009	13			$378.19
1.3	Girl Wilson	DISABLED_DEPENDENT	05/06/2011	12			$378.19
2	Ashley Green	EMPLOYEE	12/09/1981	41	EO	NM	$643.66
3	John Smith	EMPLOYEE	06/08/1987	35	EO	NM	$604.11

2. Click **Print** to print the rates, if needed.



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

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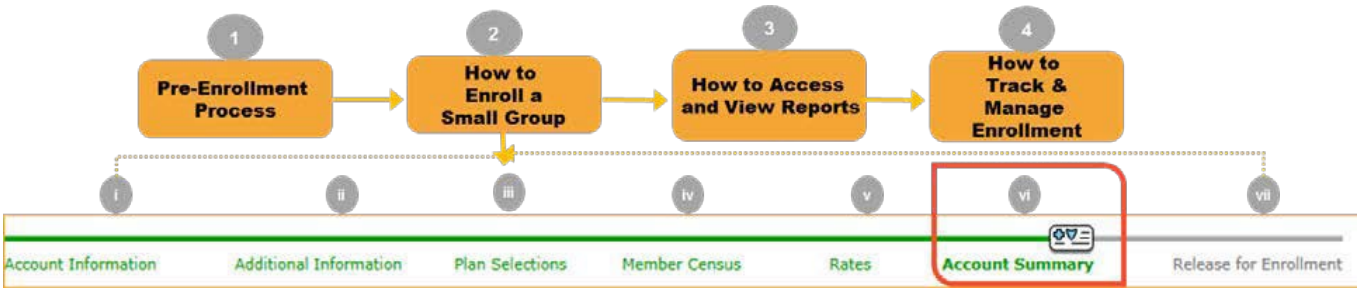
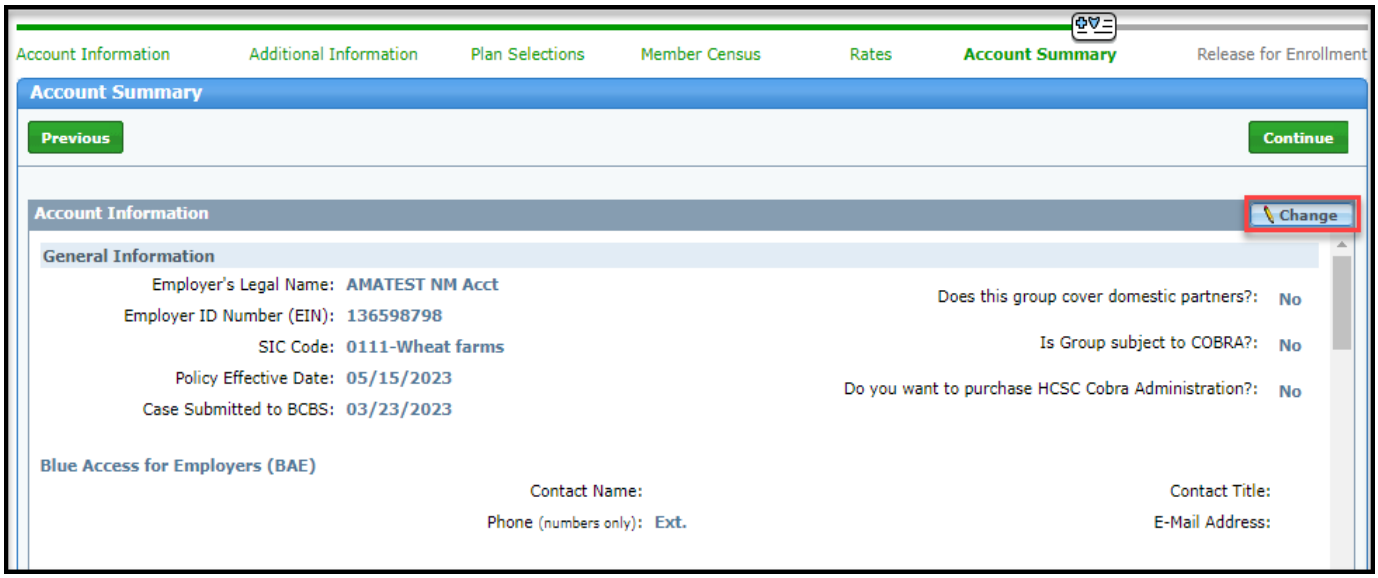
2 How to Enroll a Small Group (Cont'd.)

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** 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.

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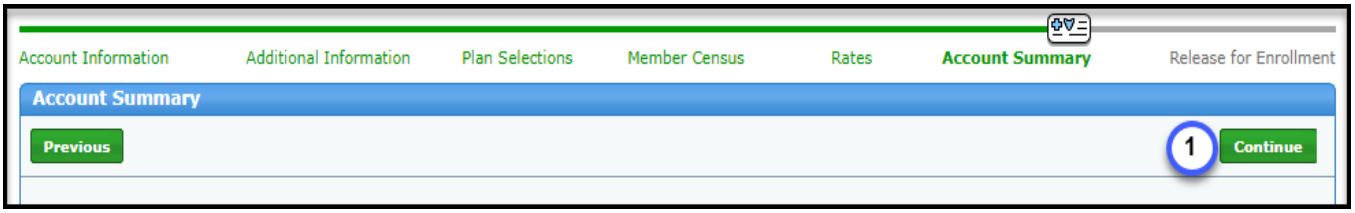
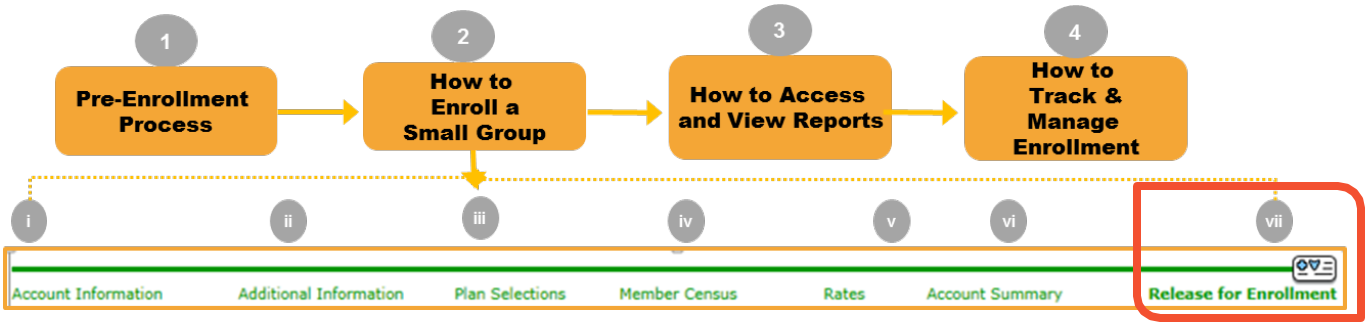
2 How to Enroll a Small Group (Cont'd.)

VI. Account Summary (Cont'd)

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





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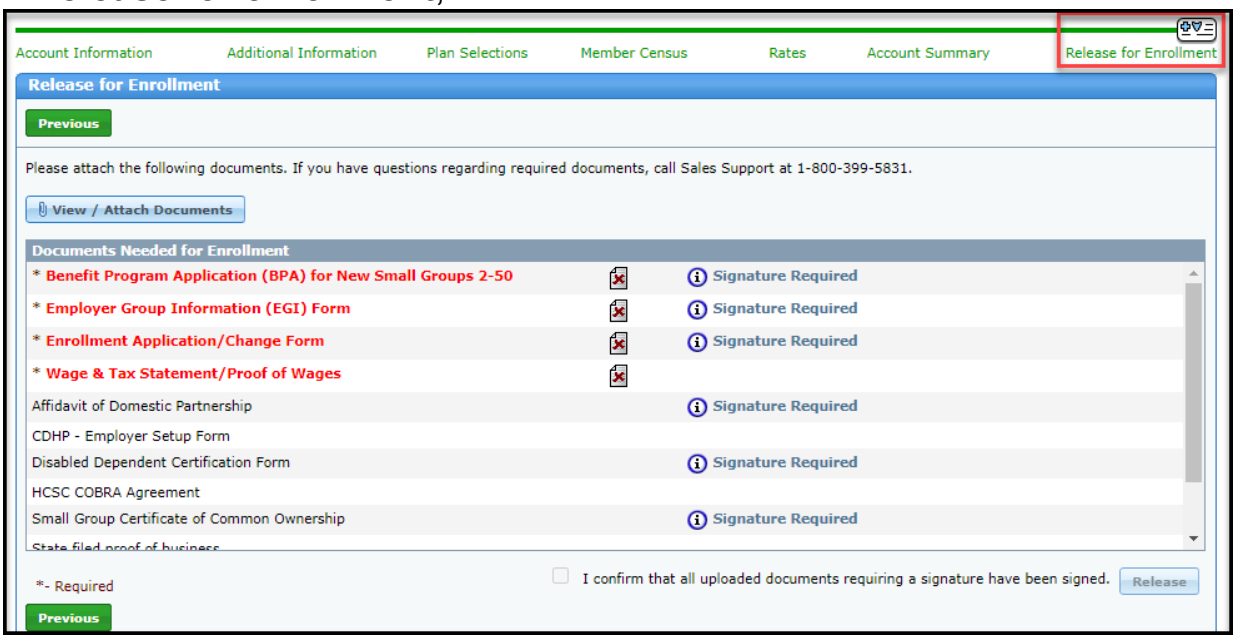
2 How to Enroll a Small Group (Cont'd.)

VII. Release For Enrollment

Step VII: Release for Enrollment

Based on the default required documents, under the **Documents Needed for Enrollment** section a list will populate. Documents will be required based on the selections made during the data entry process. Required documents are noted by an asterisk and are in bolded in red font. In order to **release for enrollment**, these documents must be attached.



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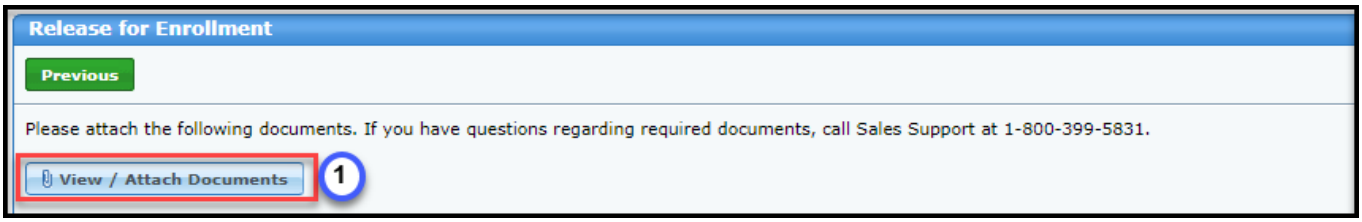
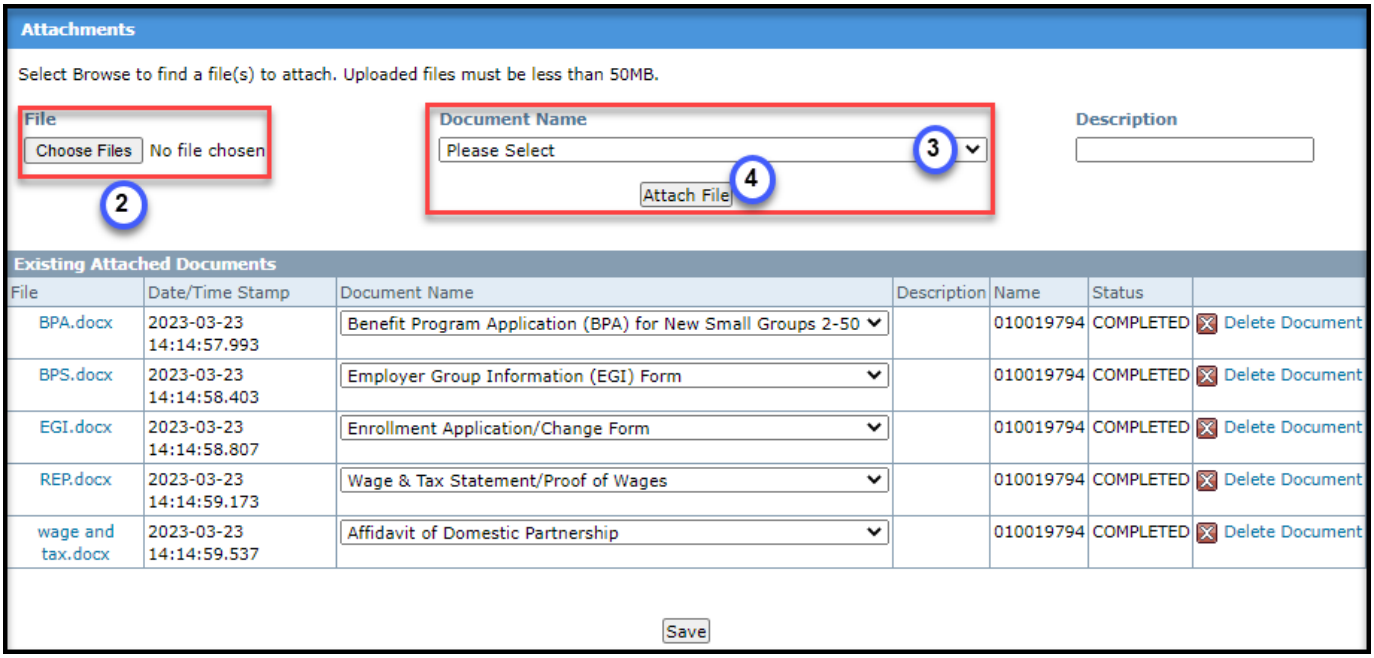
2 How to Enroll a Small Group (Cont'd.)

VII. Release For Enrollment (Cont'd)





1. Click **View/Attach Documents**. This will populate a pop-up window, allowing the user to search system files to find the appropriate document.
2. Click **Choose Files** and locate the appropriate system folder and file.
3. Select the document type from the **Document Name** drop-down list.
4. Click **Attach File**. The document shows in the **Existing Attached Documents** section.

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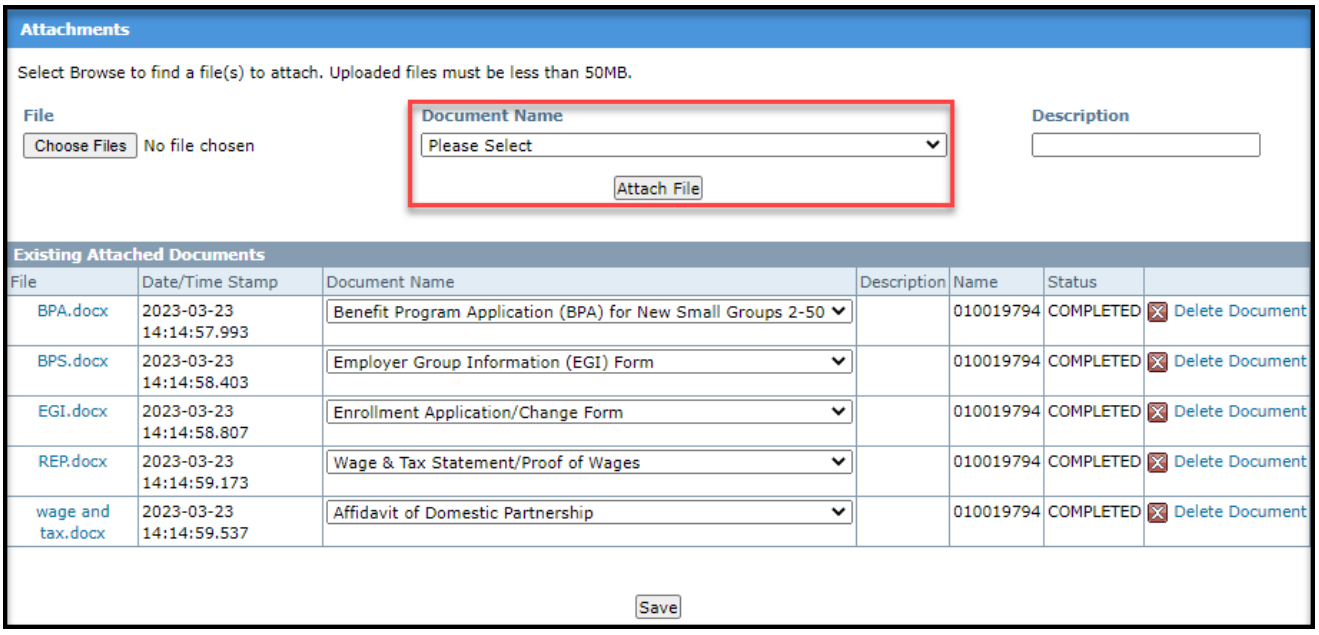
2 How to Enroll a Small Group (Cont'd.)

VII. Release For Enrollment (Cont'd)



While uploading documents, if you select the Document name inaccurately, you have the ability to change the Document name indicator, instead of going through the process of deleting and uploading the document a second time.

You can also upload multiple documents, if required. When uploading 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**.

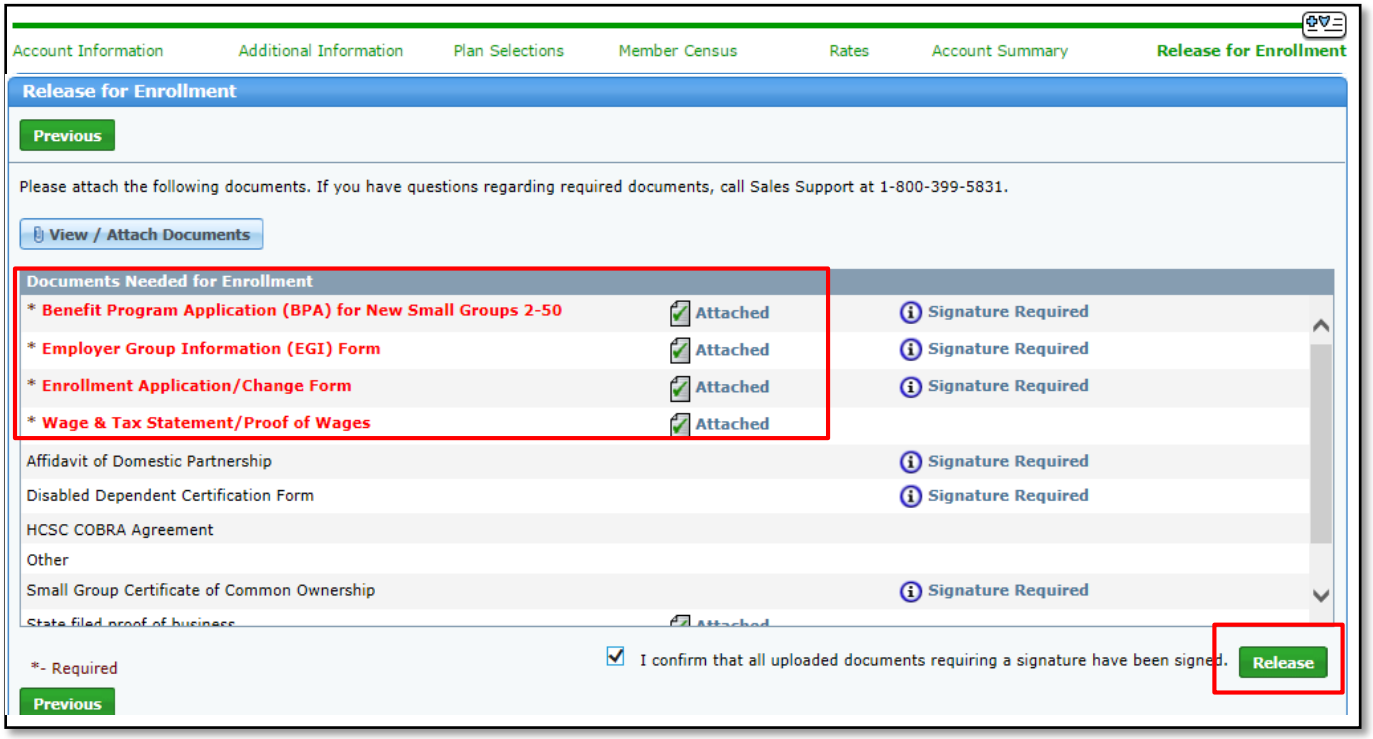
Use the drop-down arrows next to the specific document to change the Document Type. After changing the necessary document types, you must scroll down to the bottom and click **Save**. Once that button is clicked, the screen will scroll to the top automatically indicating the changes have been saved. When done, click **X** to return to the **Release for Enrollment** screen.

Return to Table of Contents

2 How to Enroll a Small Group (Cont'd.)

VII. Release For Enrollment (Cont'd)

The Documents Needed for Enrollment section easily identifies the Required and Optional Documents. Required documents are identified by **bolded red font** and asterisks. The "Missing" will show for any required documents that have not been attached. "Attached" will show for any document type that was attached.



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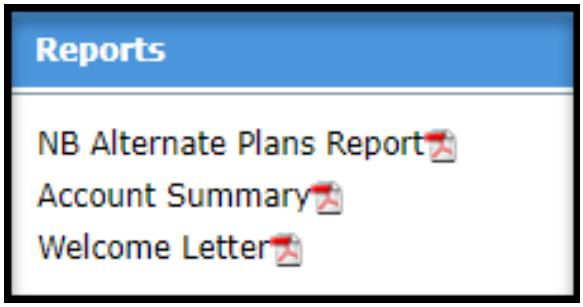
2 How to Enroll a Small Group (Cont'd.)

VIII. Account Summary

Before moving to the final **Release for Enrollment** step, let's discuss the Account Summary Report.

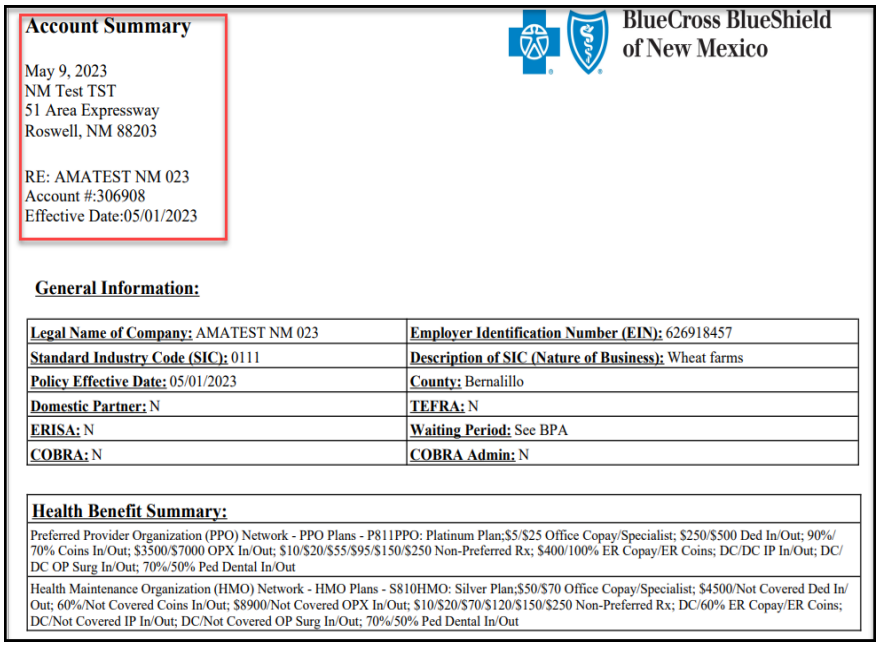
An **Account Summary Report** is available in the **Reports** list after you click **Continue** on the **Account Summary** screen.



This report should display the **Producer's** name.

Before the case is released, select the Account Summary document from the Reports list by clicking **Reports** at the top of the screen. 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.

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



Account Summary

May 9, 2023
NM Test TST
51 Area Expressway
Roswell, NM 88203

RE: AMATEST NM 023
Account #:306908
Effective Date:05/01/2023

BlueCross BlueShield of New Mexico

General Information:

Legal Name of Company: AMATEST NM 023	**Employer Identification Number (EIN):** 626918457
Standard Industry Code (SIC): 0111	**Description of SIC (Nature of Business):** Wheat farms
Policy Effective Date: 05/01/2023	**County:** Bernalillo
Domestic Partner: N	**TEFRA:** N
ERISA: N	**Waiting Period:** See BPA
COBRA: N	**COBRA Admin:** N

Health Benefit Summary:
Preferred Provider Organization (PPO) Network - PPO Plans - P811PPO: Platinum Plan;$5/$25 Office Copay/Specialist; $250/$500 Ded In/Out; 90%/70% Coins In/Out; $3500/$7000 OPX In/Out; $10/$20/$55/$95/$150/$250 Non-Preferred Rx; $400/100% ER Copay/ER Coins; DC/DC IP In/Out; DC/DC OP Surg In/Out; 70%/50% Ped Dental In/Out
Health Maintenance Organization (HMO) Network - HMO Plans - S810HMO: Silver Plan;$50/$70 Office Copay/Specialist; $4500/Not Covered Ded In/Out; 60%/Not Covered Coins In/Out; $8900/Not Covered OPX In/Out; $10/$20/$70/$120/$150/$250 Non-Preferred Rx; DC/60% ER Copay/ER Coins; DC/Not Covered IP In/Out; DC/Not Covered OP Surg In/Out; 70%/50% Ped Dental In/Out

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.

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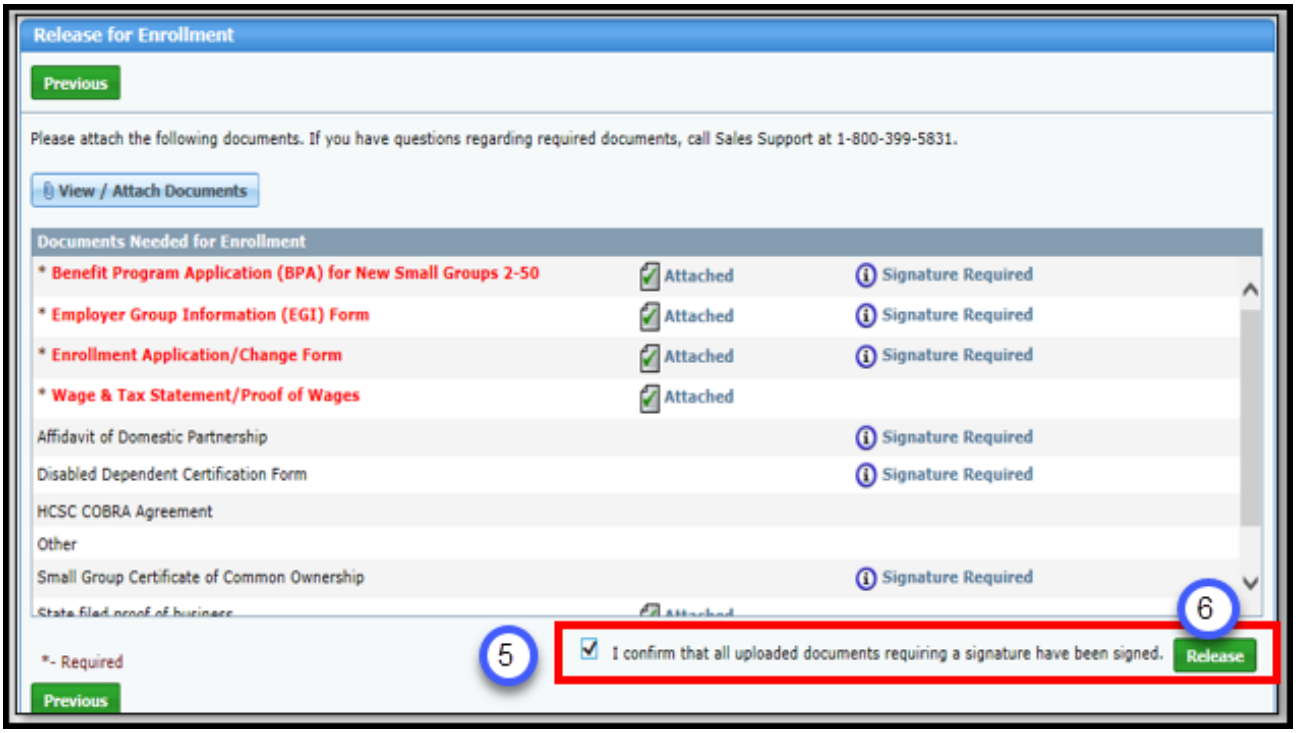
2 How to Enroll a Small Group (Cont'd.)

VII. Release for Enrollment (Cont'd.)



As each document is attached, the **Documents Needed for Enrollment** list updates to show **Attached.** The **Release** button remains grayed out until all **required** documents are attached.

5. 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.

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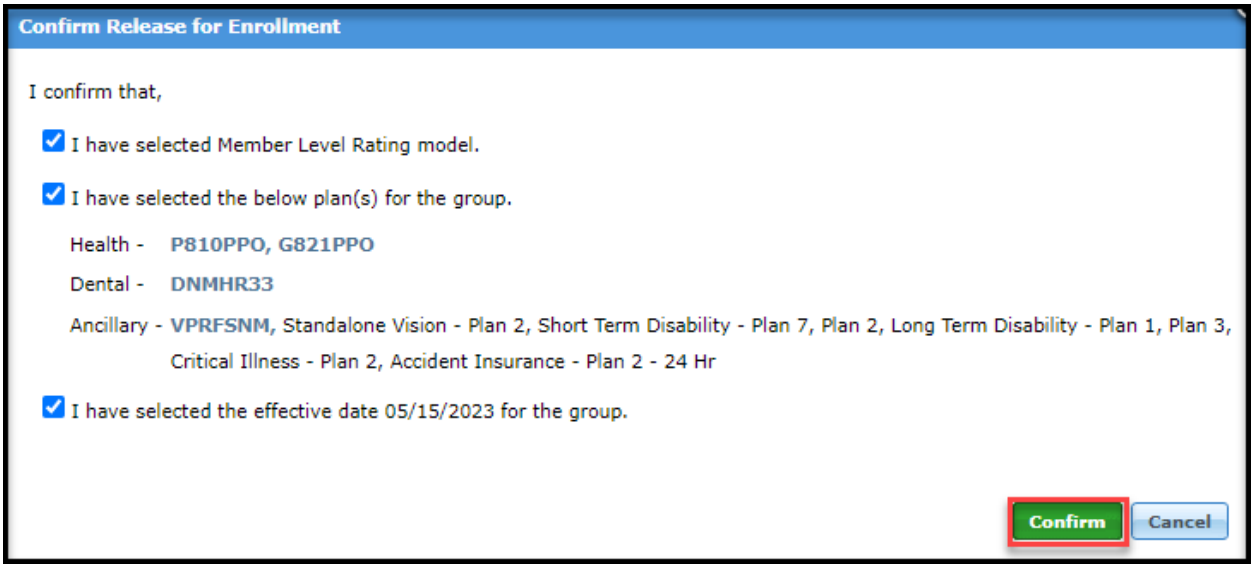
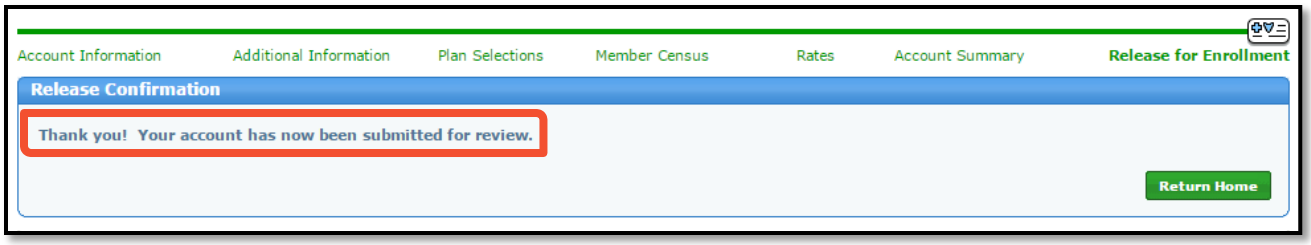
2 How to Enroll a Small Group (Cont'd.)

VII. Release for Enrollment (Cont'd.)





7. Confirm your selections. Click **Confirm**. A message saying **"Thank you! Your account has been submitted for review."** is displayed. At this point you can click **Return Home** to return to the home page.

Return to Table of Contents

2 How to Enroll a Small Group (Cont'd.)

VII. Release for Enrollment (Cont'd.)

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 more information, they send you an email notification requesting more information and allowing you to go back into the tool and enter/upload missing information or documents. If you require changes, prior to 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 Information Required** with the reason code of **Data Change Needed**. Once submitted, you cannot edit data.

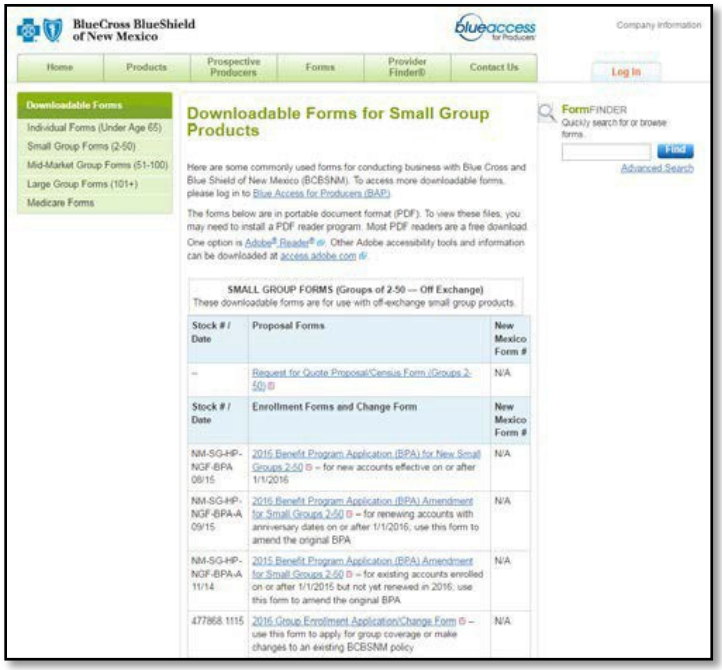
Return to Table of Contents

2 How to Enroll a Small Group (Cont'd.)

VII. Release for Enrollment (Cont'd.)

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 Blue Access for Producers (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.

The updated list of the Required and the Optional documents is displayed in the **Document Name** list.



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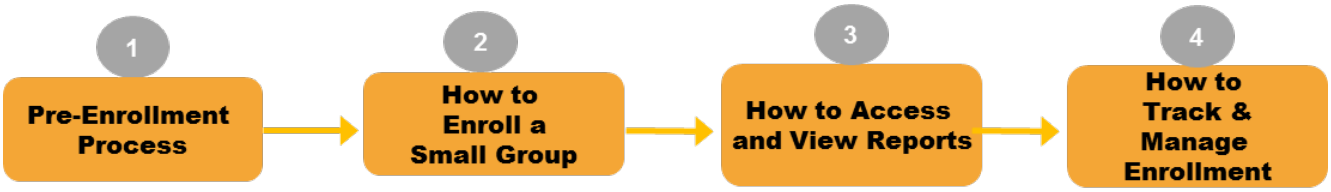
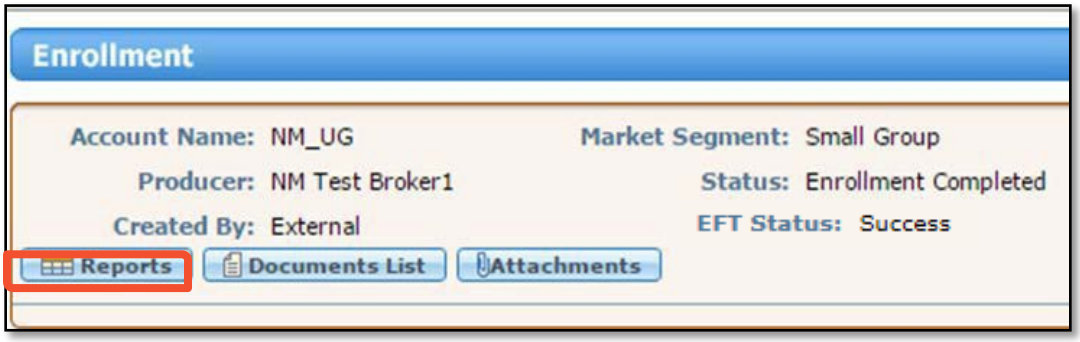
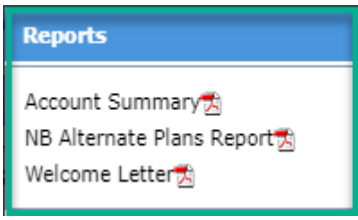
3 How to Access and View Reports



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 list include:

Welcome Letter: Available after Underwriting approves the case. An email advising that the group has been approved will be sent to the producer. 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.

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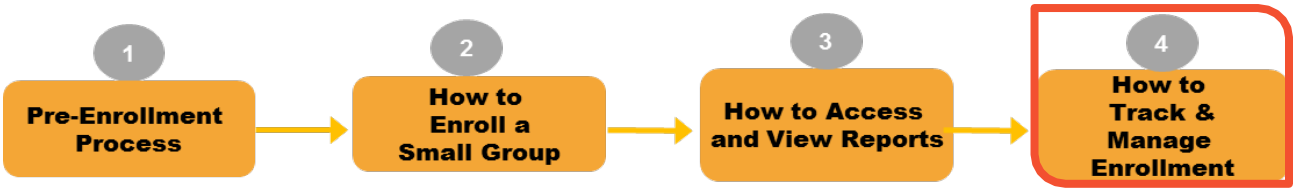
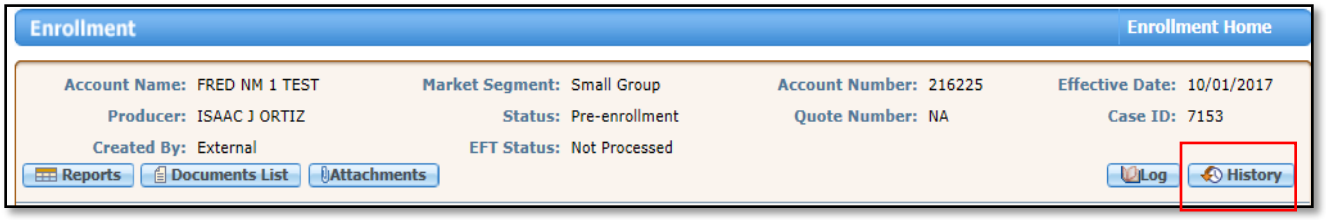
4 How to Track and Manage Enrollment (Cont'd.)

VIII. 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
03/23/2023	Complete Acct/Membership Entry		46 Day(s)
03/23/2023	Transfer To Bluestar	Completed	0 Day(s)
03/23/2023	Underwriter Review	Completed	Day(s)
03/22/2023	Enrollment Data Entry	Completed	1 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.
Enrollment More Info Required	Pre-Enrollment More Info Needed	BCBS has requested additional information and the submitter is in the process of obtaining requested information.
Enrollment Data Entry Review	Enrollment Data Entry Review	Pre-Enrollment documentation has been submitted to BCBS for review.
Underwriter Review	Pending UW review or	Enrollment documentation has been submitted to

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

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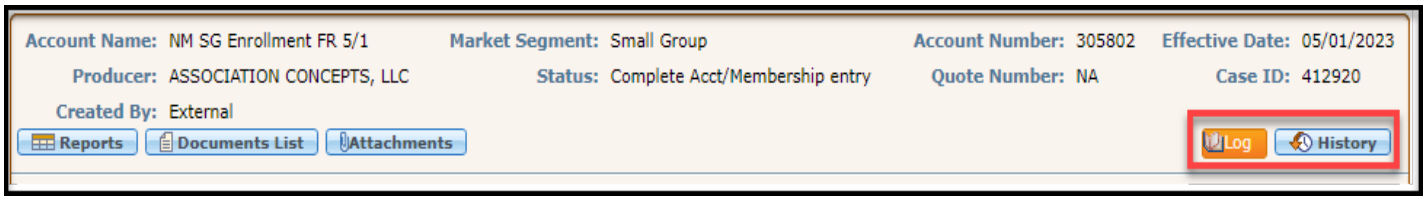
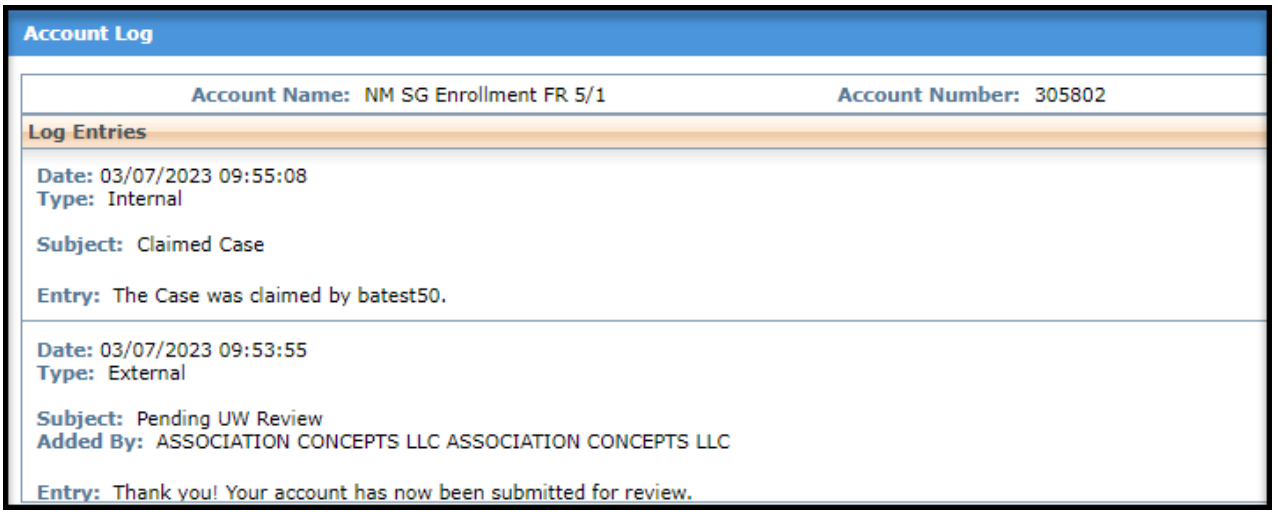
4 How to Track and Manage Enrollment (Cont'd.)

IX. Enrollment Status (Cont'd.)





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. You will still need to attach a document to the system to provide any clarifications to the underwriter, as needed.

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4 How to Track and Manage Enrollment (Cont'd.)

X. More Information Required

In this example, once you have released the group for enrollment, the Underwriter reviews the case and pushes it back to the producer for changes. An email will automatically generate from the system and go to the email address that was input for the producer on the account information page. Please note that you should not reply to this email. Any responses will not be received by BCBS.
You will receive an email notification with the details. You can go back into the eSales Tool to enter the missing information and/or upload missing documents. The email notification specifies the type of information/document that is missing/required.

Sample "More Information Required" email notification is below.

Blue Cross Blue Shield of New Mexico (BCBSNM) requires additional information to continue reviewing the small employer group coverage enrollment for NM_UG Case ID #13895. The following information needs to be updated or provided:

- Missing/Incorrect/Incomplete Document (s)

Missing/Incorrect/Incomplete Document (s):

Employer Group Information (EGI) Form – Incomplete
Enrollment Application/Change Form - Incomplete

Additional Notes: Incomplete Documents

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

Please do not reply to this email. For questions, please contact your sales representative 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 (Cont'd.)

X. More Information Required (Cont'd.)

You will also receive an email notification 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 the Underwriting team. The case will be auto-discontinued 60 days after the Effective Date if the case is not returned to BCBS.

Sample "Aging Agents" email Notification is below.

Blue Cross Blue Shield of New Mexico (BCBSNM) requires additional information to continue reviewing the small employer group coverage enrollment for NM_UG Case ID #13895.

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)**

Employer Group Information (EGI)
Form – Incomplete Enrollment
Application/Change Form –
Incomplete

Additional Notes: Incomplete Documents.

Please return to eSales 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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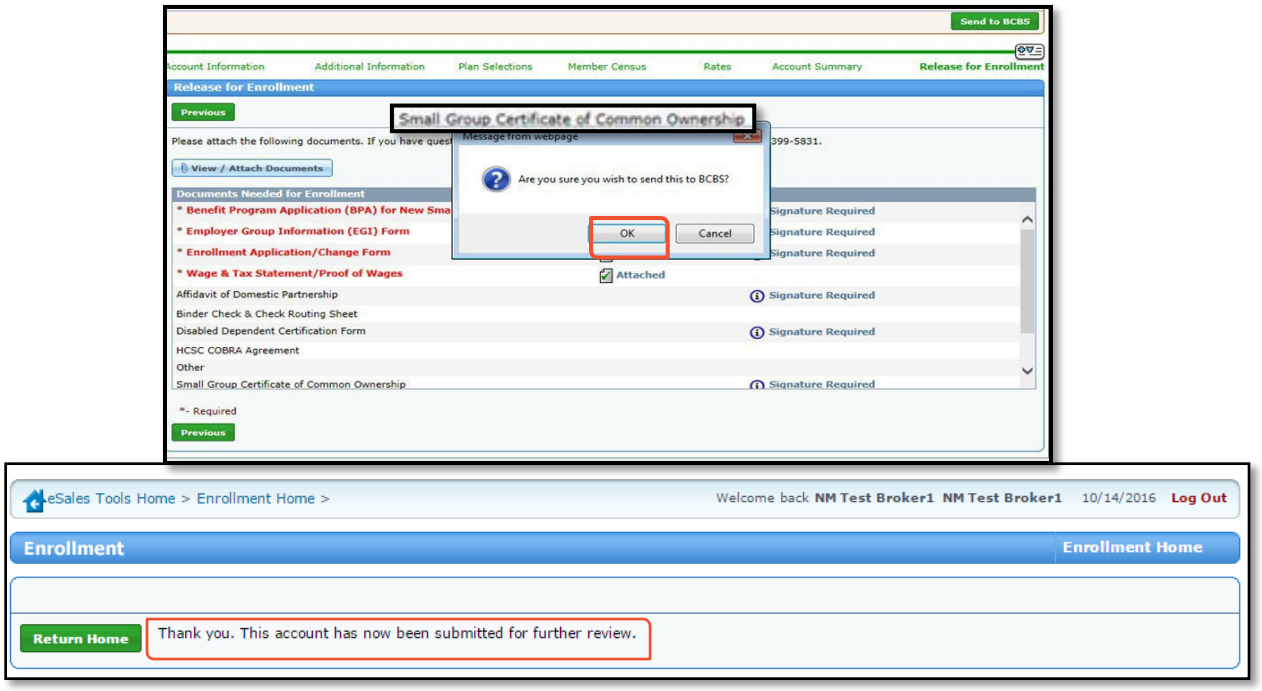
4 How to Track and Manage Enrollment (Cont'd.)

X. More Information Required (Cont'd.)

Once you receive an email notification from the Underwriting team, you login to the eSales Tool. 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. Move to the **Release for Enrollment** screen and add the requested documents. 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: When an account is in "More Information Required" activity, the "Send to BCBS" button will be available on all enrollment screens unless Data Change is required by the Underwriter. If "Date Change Needed" is selected, the user will need to navigate to the Account Summary screen in order to use the "Send to BCBS" button and return the case for approval.

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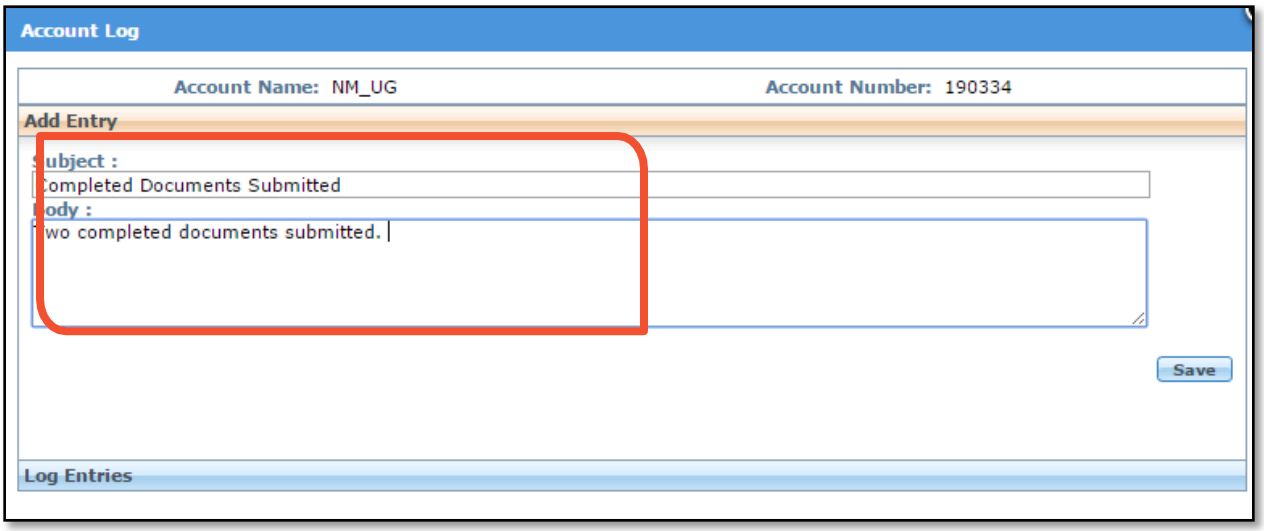
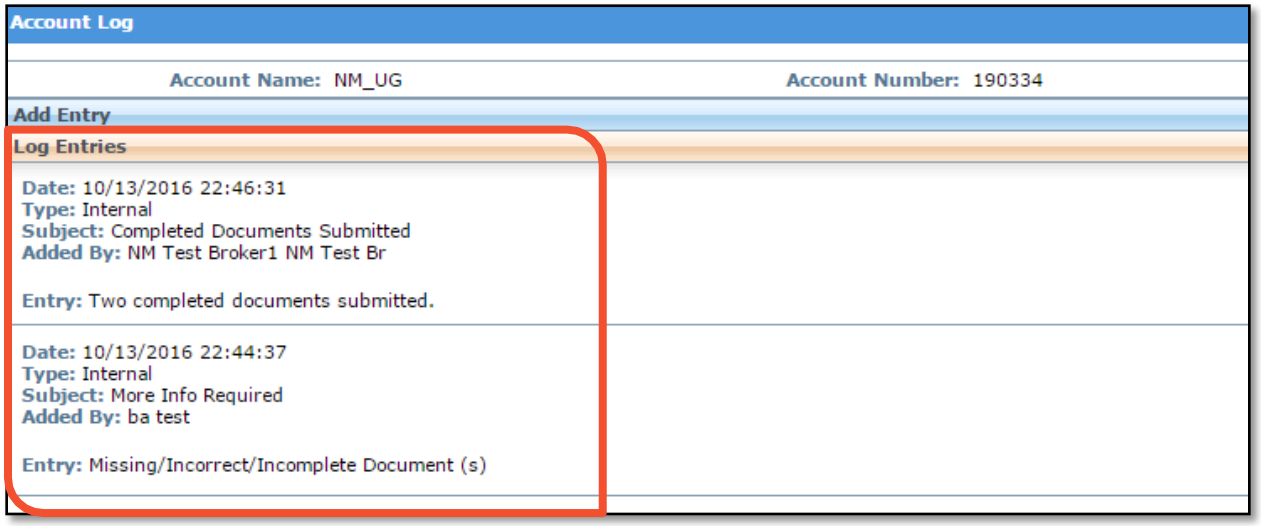
4 How to Track and Manage Enrollment (Cont'd.)

X. More Information Required (Cont'd.)

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 (Cont'd.)

XI. Underwriting Approval Received

An email notification will be sent to the Producer once the case has been approved by Underwriting.

Sample "Approval" email notification is below.

Blue Cross and Blue Shield of New Mexico (BCBSNM) has approved Test NM Acct for group employer coverage with an effective date of 05/01/2023.

BCBSNM 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 **Small Group & Middle Market 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.

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.

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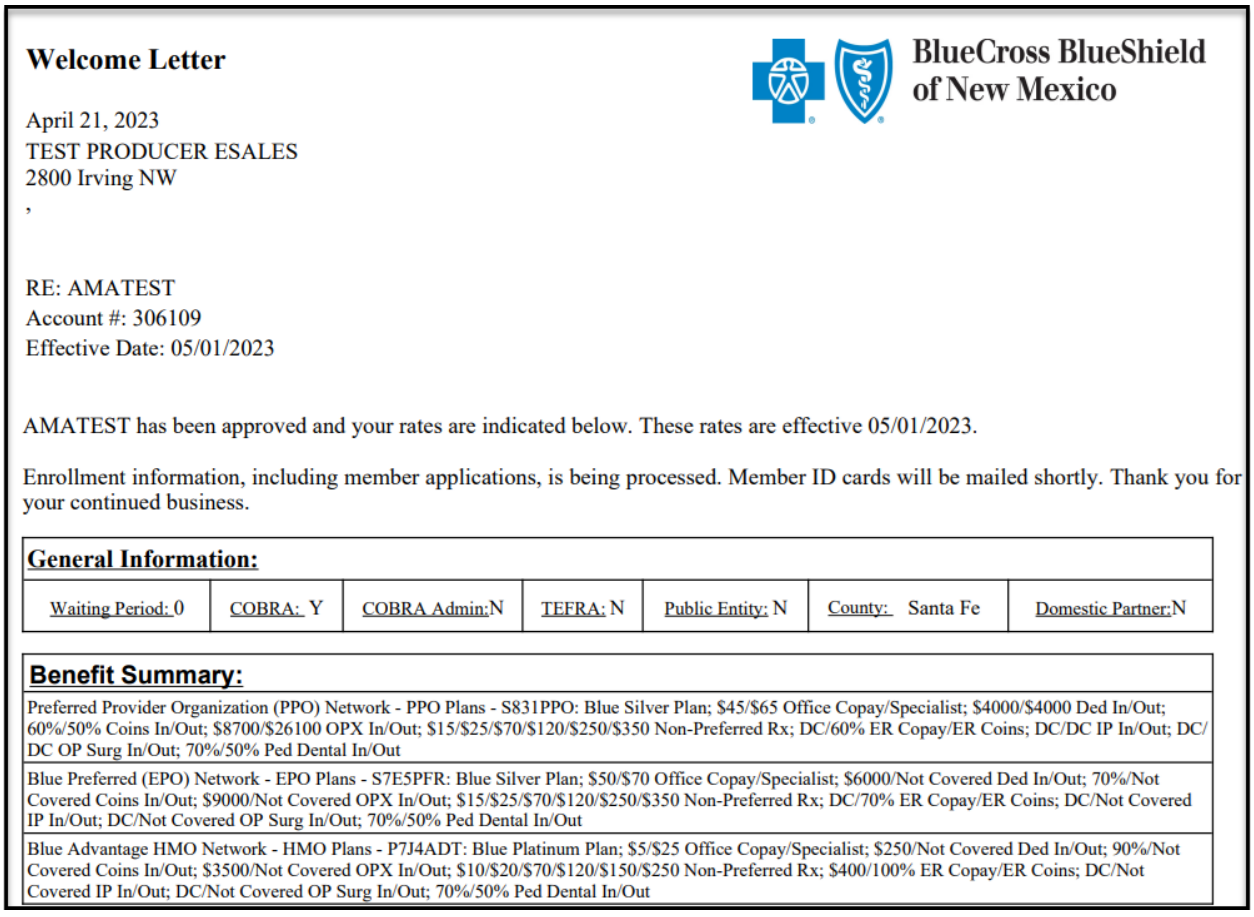
4 How to Track and Manage Enrollment (Cont'd.)

XII. Underwriting Approval Received (Cont'd.)

The Welcome Letter is available after Underwriting approves the group. An email advising that the group has been approved is sent to the producer. 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" is below.



Welcome Letter

BlueCross BlueShield of New Mexico

April 21, 2023
TEST PRODUCER ESALES
2800 Irving NW
,

RE: AMATEST
Account #: 306109
Effective Date: 05/01/2023

AMATEST has been approved and your rates are indicated below. These rates are effective 05/01/2023.

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: 0	COBRA: Y	COBRA Admin:N	TEFRA: N	Public Entity: N	County: Santa Fe	Domestic Partner:N

Benefit Summary:
Preferred Provider Organization (PPO) Network - PPO Plans - S831PPO: Blue Silver Plan; $45/$65 Office Copay/Specialist; $4000/$4000 Ded In/Out; 60%/50% Coins In/Out; $8700/$26100 OPX In/Out; $15/$25/$70/$120/$250/$350 Non-Preferred Rx; DC/60% ER Copay/ER Coins; DC/DC IP In/Out; DC/DC OP Surg In/Out; 70%/50% Ped Dental In/Out
Blue Preferred (EPO) Network - EPO Plans - S7E5PFR: Blue Silver Plan; $50/$70 Office Copay/Specialist; $6000/Not Covered Ded In/Out; 70%/Not Covered Coins In/Out; $9000/Not Covered OPX In/Out; $15/$25/$70/$120/$250/$350 Non-Preferred Rx; DC/70% ER Copay/ER Coins; DC/Not Covered IP In/Out; DC/Not Covered OP Surg In/Out; 70%/50% Ped Dental In/Out
Blue Advantage HMO Network - HMO Plans - P7J4ADT: Blue Platinum Plan; $5/$25 Office Copay/Specialist; $250/Not Covered Ded In/Out; 90%/Not Covered Coins In/Out; $3500/Not Covered OPX In/Out; $10/$20/$70/$120/$150/$250 Non-Preferred Rx; $400/100% ER Copay/ER Coins; DC/Not Covered IP In/Out; DC/Not Covered OP Surg In/Out; 70%/50% Ped Dental In/Out

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4 How to Track and Manage Enrollment (Cont'd.)

XII. Underwriting Approval Received (Cont'd.)

Temporary ID Cards: An email notification is sent to the Producer when ID cards are released, indicating that temporary ID cards are available.

Sample "ID Card" email notification is below.

Membership processing for NM_UG (Account # 190334) 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.

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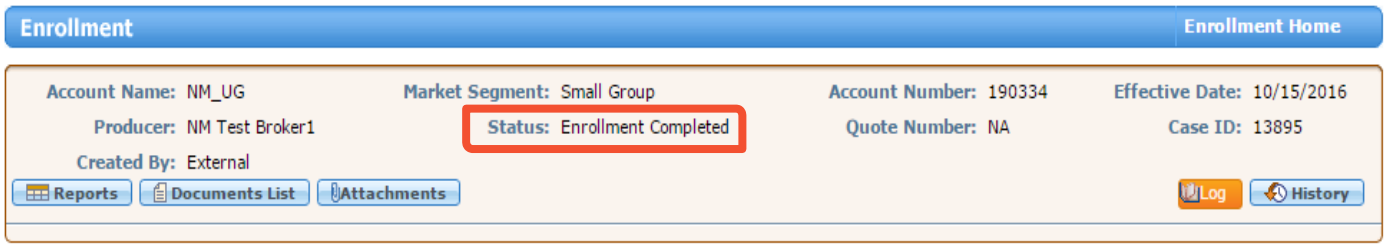
4 How to Track and Manage Enrollment (Cont'd.)

XII. Underwriting Approval Received (Cont'd.)

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 with the reason code(s). Contact your Sales Representative if you have questions regarding a case that is not approved.

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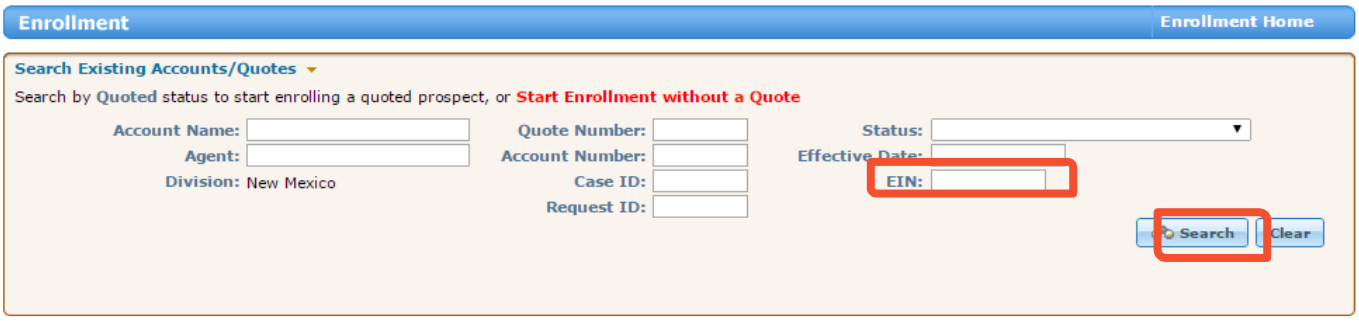
4 How to Track and Manage Enrollment (Cont'd.)

XIII. Search Functionality

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



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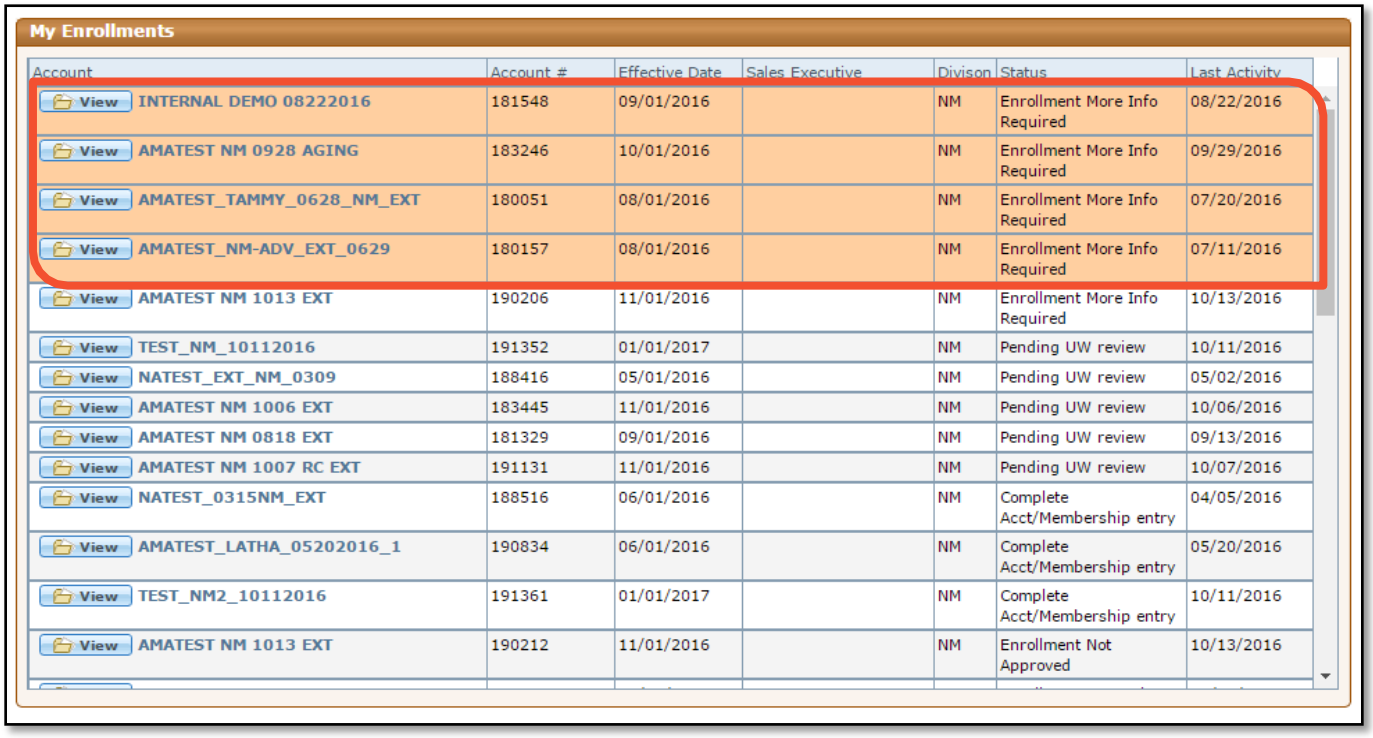
4 How to Track and Manage Enrollment (Cont'd.)

XIV. 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 INTERNAL DEMO 08222016	181548	09/01/2016		NM	Enrollment More Info Required	08/22/2016
View AMATEST NM 0928 AGING	183246	10/01/2016		NM	Enrollment More Info Required	09/29/2016
View AMATEST_TAMMY_0628_NM_EXT	180051	08/01/2016		NM	Enrollment More Info Required	07/20/2016
View AMATEST_NM-ADV_EXT_0629	180157	08/01/2016		NM	Enrollment More Info Required	07/11/2016
View AMATEST NM 1013 EXT	190206	11/01/2016		NM	Enrollment More Info Required	10/13/2016
View TEST_NM_10112016	191352	01/01/2017		NM	Pending UW review	10/11/2016
View NATEST_EXT_NM_0309	188416	05/01/2016		NM	Pending UW review	05/02/2016
View AMATEST NM 1006 EXT	183445	11/01/2016		NM	Pending UW review	10/06/2016
View AMATEST NM 0818 EXT	181329	09/01/2016		NM	Pending UW review	09/13/2016
View AMATEST NM 1007 RC EXT	191131	11/01/2016		NM	Pending UW review	10/07/2016
View NATEST_0315NM_EXT	188516	06/01/2016		NM	Complete Acct/Membership entry	04/05/2016
View AMATEST_LATHA_05202016_1	190834	06/01/2016		NM	Complete Acct/Membership entry	05/20/2016
View TEST_NM2_10112016	191361	01/01/2017		NM	Complete Acct/Membership entry	10/11/2016
View AMATEST NM 1013 EXT	190212	11/01/2016		NM	Enrollment Not Approved	10/13/2016

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 (Cont'd.)

V. My Enrollments

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 NM_UG	10/15/2016		NM	Enrollment Completed	10/13/2016
View NM_UG	10/15/2016		NM	Pre-enrollment	10/13/2016
View TEST_NM_UG	10/15/2016		NM	Pre-enrollment	10/13/2016
View AMATEST SS NM EXT 1013	01/01/2017		NM	Enrollment Completed	10/13/2016
View AMATEST NM 1013 EXT	11/01/2016		NM	Release ID cards	10/13/2016
View AMATEST NM 1013 EXT	11/01/2016		NM	Enrollment Not Approved	10/13/2016
View AMATEST NM 1013 EXT	11/01/2016		NM	Enrollment More Info Required	10/13/2016
View SYS Account Name Place Holder	-		NM	Pre-enrollment	10/12/2016
View TEST_NM2_10112016	01/01/2017		NM	Complete Acct/Membership entry	10/11/2016
View TEST_NM_10112016	01/01/2017		NM	Pending UW review	10/11/2016
View JPM R4 TOUCHPOINT 10/11 EXTENRAL	01/01/2017		NM	Pre-enrollment	10/11/2016
View AMATEST NM 1009 EXT	11/01/2016		NM	Enrollment Completed	10/10/2016
View AMATEST NM EXT 01	01/01/2017		NM	Enrollment Completed	10/10/2016
View AMATEST SS NM EXT	01/01/2017		NM	Pre-enrollment	10/10/2016
View SYS Account Name Place Holder	-		NM	Pre-enrollment	10/07/2016
View AMATEST NM 1007 RC EXT	11/01/2016		NM	Pending UW review	10/07/2016
View AMATEST SS NM EXT 1007	01/01/2017		NM	Pre-enrollment	10/07/2016
View SYS Account Name Place Holder	-		NM	Pre-enrollment	10/06/2016
View SYS Account Name Place Holder	-		NM	Pre-enrollment	10/06/2016
View SYS Account Name Place Holder	-		NM	Pre-enrollment	10/06/2016

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Resources and Help

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

Note: If the case is not approved for enrollment by Underwriting, a **Not Approved** email notification is sent to the Producer with the reason code(s). Contact your Sales Representative if you have questions regarding a case that is not approved or for any additional questions regarding the statues of your enrolling group.

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: SGMM_TechSupport@hcsc.com

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