

# EMPLOYER WEB ENROLLMENT FUNCTIONS

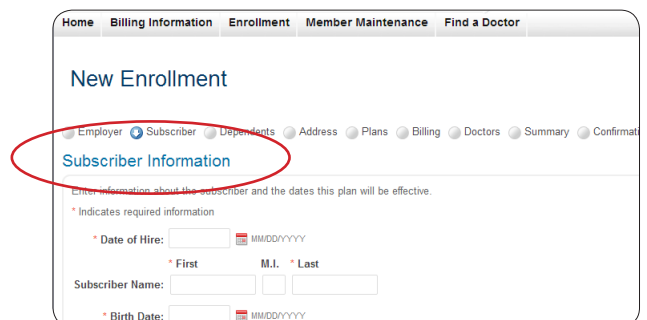
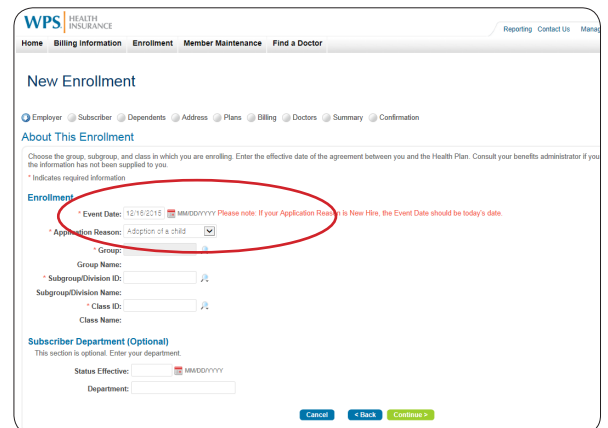
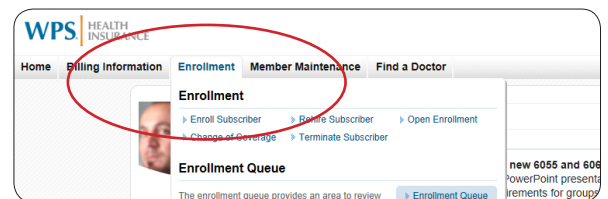
From the online group leader account home page, you have complete flexibility and control over all aspects of your organization's account information. Clearly labeled navigation tabs take you straight to what matters to you most. This self-service functionality allows you to do a variety of tasks; in particular, you are able to self-manage member eligibility.

In this step-by-step guide, we'll walk you through the enrollment functions from your account. Keep reading!

## ENROLLMENT (ALL INFORMATION MUST BE ENTERED IN ALL CAPS)

- 1) From the home page, go to **Enrollment**.
- 2) Select **Enroll Subscriber**.
- 3) Select the **Event Date** (Qualifying Event Date).
- 4) From the drop-down menu, select the **Application Reason**.
- 5) If the **Group** field does not automatically populate with your group number, use the **Group Search** to select your group (search by group name, group number or effective date).
- 6) Once you have retrieved your group, click on the group ID and it will prefill on your enrollment screen.
- 7) Click on the **Subgroup Search** and select the correct subgroup.
- 8) Click on the **Class ID Search**, select the correct class, and click on user select.
- 9) Subscriber department may be entered (field is mandatory if your group is set up by departments).
- 10) Click **Continue**.
- 11) On the **Subscriber Information** screen, enter the following information in **ALL CAPS**—date of hire, first and last name (middle initial is optional), date of birth, gender, SSN, and marital status.
- 12) Click **Continue**.
- 13) Click **Add Dependent** and enter all dependent information or click continue if no dependents.
- 14) On the **Address Information** screen, enter the address information.

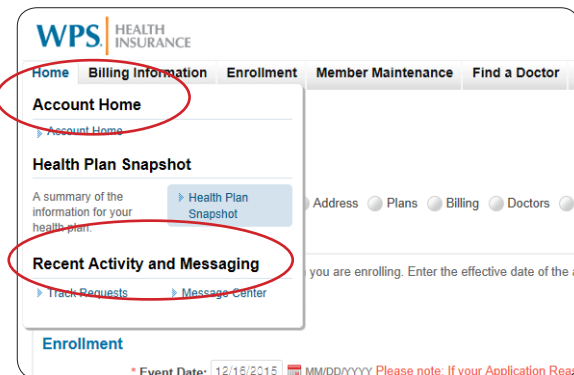
**NOTE:** If not all dependents live at the same address, enter all addresses and then assign them to the correct dependent. Entering a mailing address is optional. EOBs will be sent to the mailing address entered for each dependent.



- 15) On the **Plan Selection** screen, select or decline the applicable coverages.  
(Be sure to complete both the **Medical** and **Rx** sections of this screen.)

**NOTE:** Indicate whether the subscriber and dependents have other coverage, Medicare, or prior insurance. Based on your responses you may need to complete additional information regarding the other insurance coverage.

- 16) On the **New Enrollment Summary** screen, review all previously entered information for accuracy. Attach any necessary documents to the application on this screen, such as Certificates of Creditable Coverage.
- 17) Once all information is verified, check that you agree with the legal disclaimer and **Complete Enrollment**.
- 18) You will receive a confirmation page with reference number and a PDF of the application.

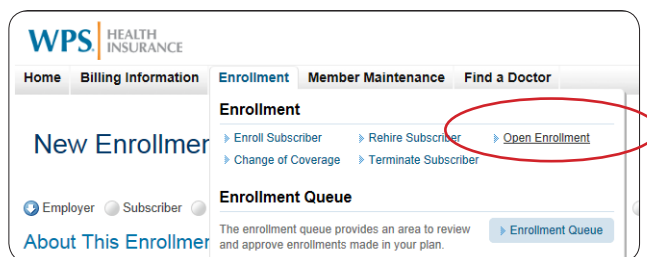


**NOTE:** If ID cards are needed right away, you may order them under the **Member Maintenance, Order ID card** section. This will also allow you to print a temporary ID card once your order is completed.

## MAKING CHANGES DURING OPEN/ANNUAL ENROLLMENT

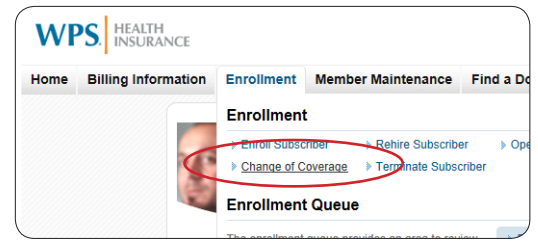
The Open Enrollment option is available only during the 30 days prior to the group renewal date.

- 1) From the home page, go to **Enrollment**.
- 2) Select **Open Enrollment**.
- 3) Use **Member Search** to find the subscriber you wish to update.
- 4) Select the subscriber or dependent you wish to update.
- 5) Continue through the screens to update subscriber information, dependent information, addresses, qualifying events, sub groups, and plans for the subscriber and any dependents.
- 6) The summary screen will show all the current changes for review prior to clicking **Complete Enrollment**.



## ADDING A DEPENDENT TO AN EXISTING SUBSCRIBER

- 1) From the home page, go to **Enrollment**.
- 2) Select **Change of Coverage**.
- 3) Use **Member Search** to find the subscriber you wish to update.
- 4) Select the subscriber when adding dependents to the plan.
- 5) Select the **Effective date, Type of change** and **Event** (for life changes).
- 6) On the **Update Coverage Information** screen, click **Add Dependent**.
- 7) Complete all fields on the dependent information screen and click **Continue**.  
**Note:** Please enter 999-99-9999 if newborn SSN is unknown.
- 8) Verify the information on the dependent list screen and click **Continue**.
- 9) Verify the information on the **Address List and Member Assignments** screen and click **Continue**.
- 10) On the **Plan Selection**, verify the Medical plan that has pre-filled and select the correct drug plan information.
- 11) Verify all information on the **Update Coverage Information** screen and then click **Complete Enrollment**.



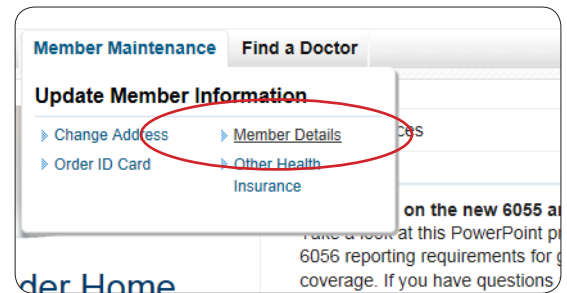
## CHANGING SUBSCRIBER/DEPENDENT INFORMATION

**Member Maintenance** allows you to make updates to subscriber and dependent addresses, order ID cards, other insurance, and personal information.

Under Member Details, you may update the following items:

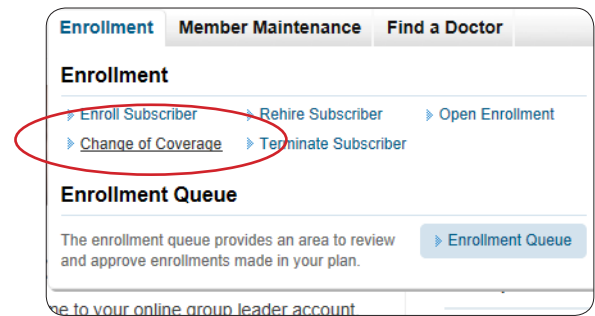
- Name
- Date of birth
- Marital status
- Gender
- SSN

- 1) From the home page, go to **Member Maintenance**.
- 2) Select **Member Details** (to update personal details).
- 3) Use **Member Search** to find the subscriber you wish to update.
- 4) Select the subscriber or dependent you wish to update.
- 5) Update the information and click **Continue**.
- 7) Verify the updates and click **Finish**.



## TERMINATING A DEPENDENT FROM AN EXISTING SUBSCRIBER

- 1) From the home page, go to **Enrollment**.
- 2) Select **Change of Coverage**.
- 3) Use **Member Search** to find the subscriber you wish to update.
- 4) Select the dependent you wish to terminate.
- 5) On the **Update Coverage Information** screen, enter the effective date of the change, type of change, the event, and click **Continue**.
- 6) Verify the information on **Subscriber Information** screen and click **Continue**.
- 7) On the **Update Coverage Information** screen, click **Remove** next to the dependent you wish to remove from coverage.
- 8) Verify the effective date of the change and select the reason and explanation code and click **Continue**.
- 9) The following screen will show the dependent in an inactive status; click **Continue**.
- 10) Continue through the **Address List/Member Assignments** and **Plan Selection** screens.
- 11) Verify information on the **Update Coverage** screen, which shows the dependent as terminated, and click **Complete Enrollment**.



## TERMINATING A SUBSCRIBER

- 1) From the home page, go to **Enrollment**.
- 2) Click on **Terminate Subscriber**.
- 3) Use **Member Search** to find the subscriber you wish to terminate.
- 4) On the search results, select the subscriber to terminate.
- 5) Enter the termination date, reason for termination, and whether the individual is enrolling in COBRA; then click **Continue**.
- 6) If COBRA was not selected, click **Complete Enrollment**.
- 7) If COBRA was selected, the COBRA effective date will prefill based on coverage term date; enter length of COBRA Certificate (coverage) and qualifying event.
- 8) Review group information on the next screen and select the appropriate class for the COBRA coverage, if applicable.
- 9) Continue through the **Plan Selection** screen and make any additional changes.
- 10) Review the summary screen and click **Complete Enrollment** to complete the COBRA enrollment.

