BROKER RESOURCE CENTER REFERENCE GUIDE

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SECTION 1: USER REGISTRATION



SECTION 1: USER REGISTRATION

- 1. To start the registration process, go to www.bluecrossvt.org/ERC
- 2. Select "Register Now"

The role of Local Administrator is automatically assigned to the first individual registering for the business. The Local Administrator will add additional users within the organization.





Access is not immediate upon registration. Please allow up to three business days for your request to be reviewed.

An email will be sent to the address provided during registration when your request is processed.

3. Confirm you are the appropriate person for the local administrator role.

What is a local administrator?

If you are the first individual registering for your group you will be assigned the local administrator role. This means you will have access to all the standard features of the ERC (same access as the user role) plus the system administrator feature for setting up and overseeing all other users of the group. Typically, the local administrator role is assigned to one individual, though rights can be assigned to more than one person at the company.

*If you are a user of the ERC but shouldn't be a local administrator, we recommend reaching out to your current portal administrator.

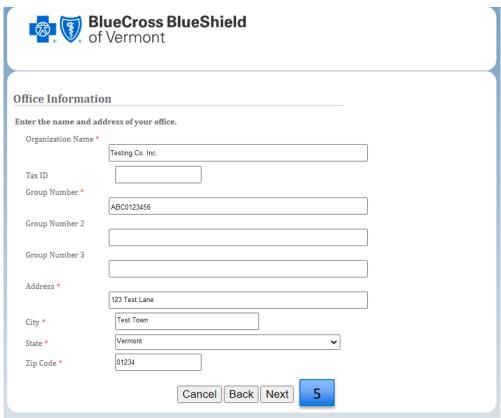


4. Enter required information. **Be sure to make note of your username and password**. Confirmation will be sent to the email address you provide.

| | BlueCross BlueShield of Vermont An Independent Licensee of the Blue Cross and Blue Shield Association. |
|--------------------------------------|---|
| User Information | |
| If you are an existing user session. | of the Connect system please login. <u>Click here to start your</u> |
| First Name * | John |
| Middle Initial | |
| Last Name * | Doe |
| Title | |
| E-Mail * | JDoe123@testmail.com |
| Confirm E-Mail * | JDoe123@testmail.com |
| Office Phone * | 800-555-1234 Example: (55) 555-5555 |
| Extension # | Example: 123456 |
| Office Fax | Example: (555) 555-5555 |
| User Name * | JDoe123 |
| Password * | TestPW01! |
| Confirm Password * | TestPW01! |
| Security Question 1 * | Childhood Phone Number |
| Security Answer 1 * | 800-555-6789 Your answer may not contain your username. |
| Security Question 2 * | Third Grade Teacher's Name |
| Security Answer 2 * | Mrs. Smith Your answer may not contain your username. |
| Security Question 3 * | Favorite Sibling's First Name |
| Security Answer 3 * | Jane Your answer may not contain your usemame. |
| Local Admin | As the primary registrant, you are automatically a local admin |
| | Cancel Back Next |

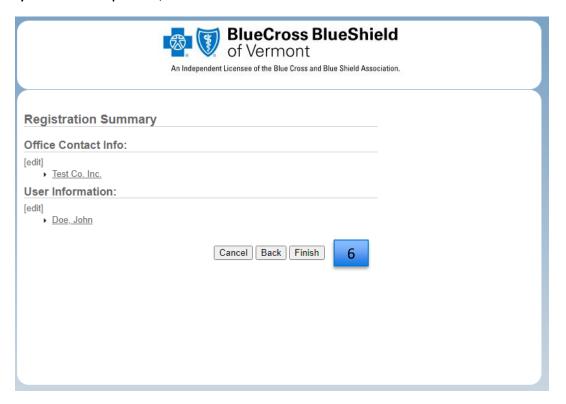


5. Enter your required group information and select "Next." (Do <u>NOT</u> enter hyphens in the tax ID field.)





6. Review your registration summary. Verify office contact and user information. Select "Back" if necessary. Once completed, select "Finish."

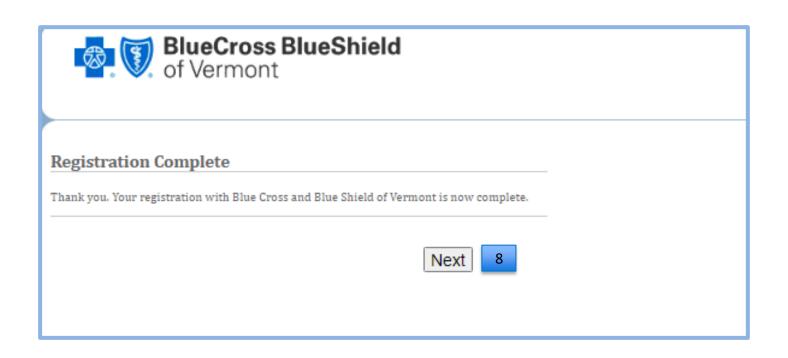


7. Make a note of your username and password. You will **NOT** be able to return to this page once you select "Next."



8. You have completed your registration! Once your application is processed, you will receive an email whether it has been approved or denied.

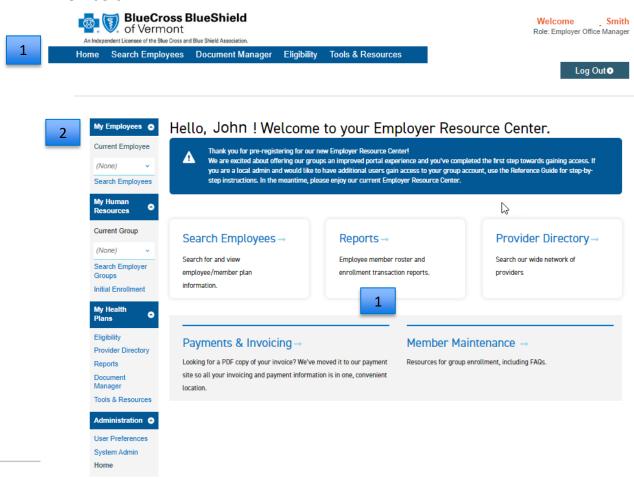
^{*}Access is not immediate upon registration. Please allow up to three business days for your request to be reviewed.



SECTION 2: NAVIGATING THE HOMEPAGE

SECTION 2: HOME PAGE

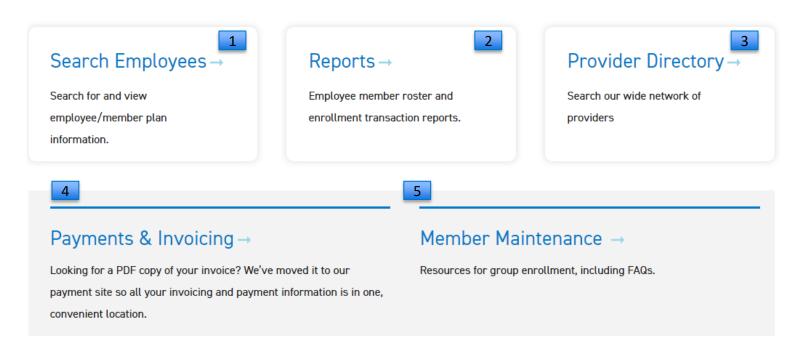
- 1. The top ribbon and center points are quick links to commonly used functions.
- Left-hand navigation- all the functionality available to help manage your employees and members.





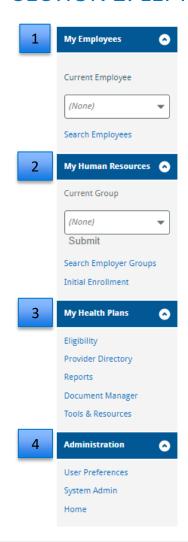
SECTION 2: HOME PAGE OPTIONS

- 1. Choose Search Employees to access information for a specific employee.
- 2. Generate PDF or Excel documents for employee rosters and transaction reports.
- 3. Locate a Blue Cross Network provider.
- 4. Access to M&T bill pay portal to view and pay your invoice.
- 5. Member Maintenance links you to our Membership-at-a-Glance resource and frequently used member forms.





SECTION 2: LEFT-HAND NAVIGATION



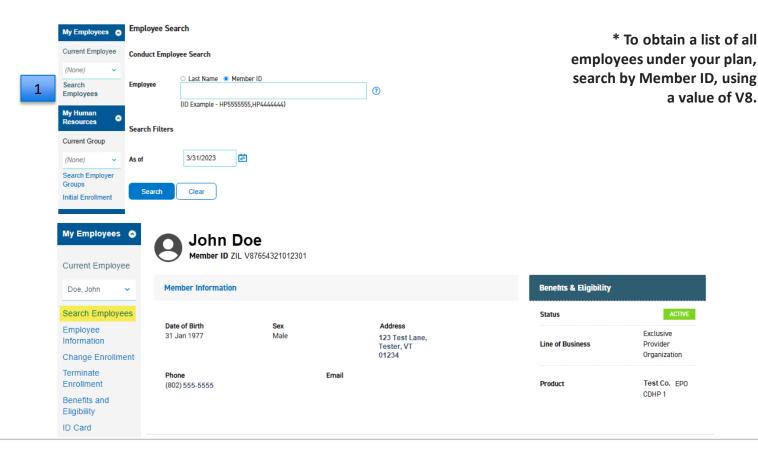
- 1. My Employees- Search for employees by last name or member ID to initiate any changes, and/or review benefit and eligibility.
- 2. My Human Resources search between your group/divisions to elect benefit plan in order to initiate initial enrollments for new subscribers.
- 3. My Health Plans review member eligibility as well as reports and tools to help manage your group plan.
- 4. Administration –review/edit your user profile and managing additional users.

SECTION 3: MY EMPLOYEES

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1. Under "My Employees," select the employee that you are updating by clicking on "Search Employees."

*'Current Employee' drop down will contain a list of the last 25 employee searches.



SECTION 3: MY EMPLOYEES

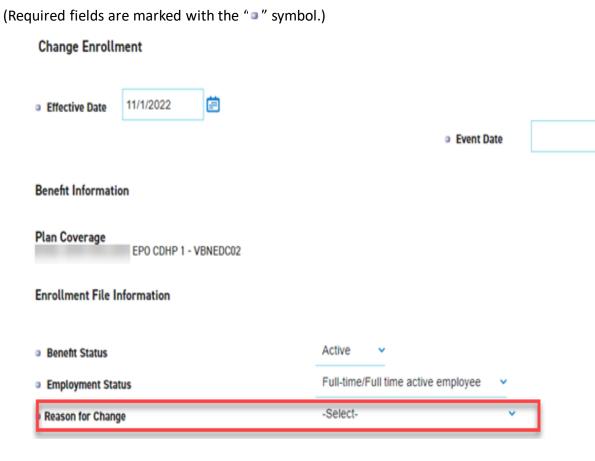
Once you have selected the employee, you can perform the following actions:

- **Employee Information** this is high level summary of your employees' demographics and benefit information.
- ➤ Change Enrollment- this option allows you to change contact information, update demographics, change a PCP, and add/modify dependent information.
- ➤ **Terminate Enrollment** this option allows you to terminate the subscriber or one or more dependents. You must select a reason for the change such as death, divorce, termination of employment and voluntary cancel.
- ➤ Benefits and Eligibility- you can view the employee's eligibility, as well as access the Outline of Coverage for their benefits.
- > ID card If you need to order an ID card or print a proof of coverage for a member.



SECTION 3: MY EMPLOYEES-CHANGE ENROLLMENT

Change Enrollment – this option allows you to make demographic changes for your employees as well as manage life events.



The following are valid Reason's for Change:

- Birth add a newborn.
 *effective date should be the 1st day following the 60-day grace period. You can verify this date by searching for the newborn under Eligibility.
- Change in Identifying Data Elements – change in name, gender, DOB, e-mail, contact phone number.
- *value is required in the top/1st 'Contact Number' field.
- Change of Location change in address
- Initial Enrollment add a new dependent
- Marriage add a spouse
- **PCP Change** change PCP

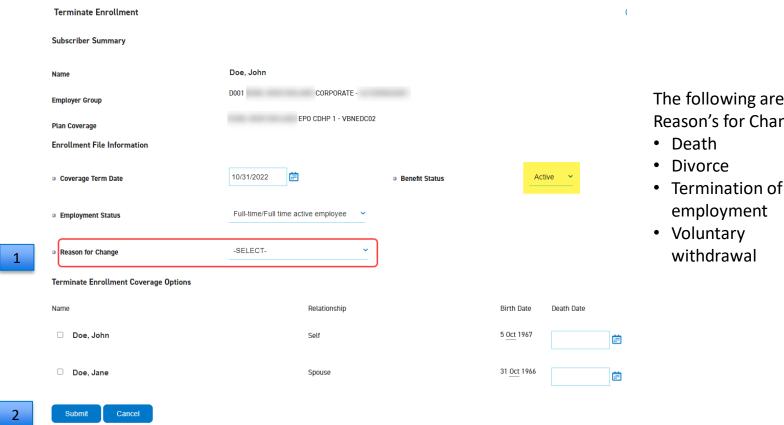


SECTION 3: MY EMPLOYEES-TERMINATE ENROLLMENT

Terminate Enrollment – this option allows you to terminate the subscriber or one or more dependents.

- You must select a reason for the change
- Click "Submit"

(Required fields are marked with the "a" symbol.)

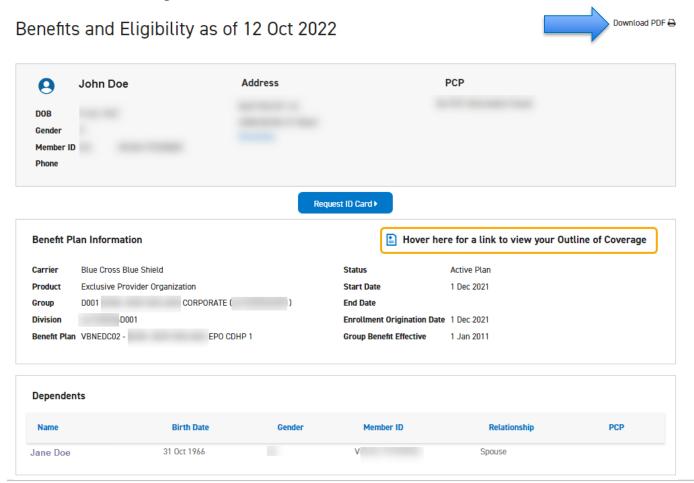


The following are valid Reason's for Change:



SECTION 3: MY EMPLOYEES-BENEFITS AND ELIGIBILITY

Benefits and Eligibility – you can view the subscriber's eligibility and benefits, request ID cards, as well as access the Outline of Coverage.



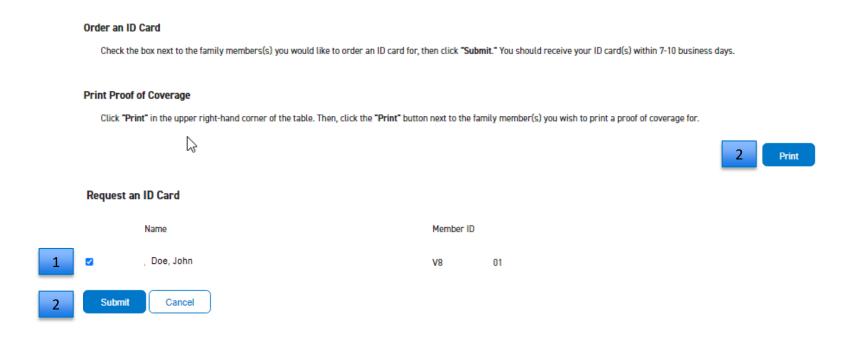
*you can download this page to a PDF for your records.



SECTION 3: MY EMPLOYEES-ID CARD

ID Card- If you need to order an ID card or print a proof of coverage.

- 1. Under "Request an ID Card" check the member you would like to order an ID Card or print proof of coverage for.
 - 2. Click "Submit" for ID Cards and "Print" for Proof of Coverage
- *An ID card will be ordered and mailed to member in approximately 7-10 business days.





SECTION 4 MY HUMAN RESOURCES

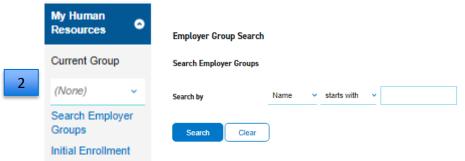


To begin your initial enrollment, you will need to select the group/division in which you enrolling your employee. There are 2 examples below how to perform this search, depending on your access. If you have more then 25 qualifying plans under your access, you will follow example 2.

1. Under "My Human Resources," use the 'Current Group' drop down. This will have a list of all your eligible Group/Division that you've recently interacted with. To search for a Group not showing on the drop down,



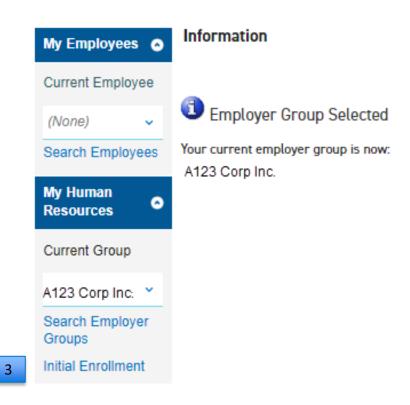
2. Under "My Human Resources," 'Search Employer Groups'. You will then be prompted to enter the name or number of the Group <u>and Division that you are enrolling the employee in. Then hit "select".</u>



* To search multiple groups tied to your access list, Search by 'Number' and enter the first three characters of the group number.



3. Once your "Current Group" is selected click on "Initial Enrollment" in the left-hand navigation bar.





4. Click "Select Plan" next to the benefit option in which you are enrolling the employee.

Below are the available plan options. Click 'select plan' next to the benefit plan the employee is enrolling in, then proceed with the initial enrollment process.





5. Effective dates must align with our membership guidelines. Our membership at a glance reference guide can be found here.

Once you select "submit", your transaction will be confirmed and submitted to Blue Cross of Vermont for processing. By submitting this transaction, you are authorizing the following:

- •You, the employer, are attesting that you have an application or electronic enrollment election signed by the employee on or before the requested effective date and agree to its accuracy.
- •The enrollment transaction adheres to the Group Benefits Policy for your Employer Group.

(Required fields are marked with the "" symbol.)

| | Benefit Enrollm | ent | | | |
|---|--------------------|----------|--|-----------|-----|
| 5 | Effective Date | 4/1/2023 | | Hire Date | iii |
| E | Benefit Informatio | on | | | |
| ŗ | Plan Coverage | | | | |
| | Edit | | | | |
| | | | | | |



- 6. You will be required to provide the following fields:
- Subscriber Demographic information-First Name, Last Name, SSN, Martial Status, Gender and Birth Date.
- Subscriber Contact Information- Contact Numbers, Mailing Address, and Mailing City, State and Zip.

| (Required fields are marked with the " " symbol.) | Subscriber Demographic Informa | ation | | | | | |
|---|--------------------------------|----------|----------|------------|------------|----------|--------|
| 6 | ⇒ First Name | | | 3 6 | ender | -Select- | • |
| _ | Middle Name | | | 3 E | lirth Date | | Ţijij. |
| | □ Last Name | | | | | | |
| | Suffix | | | | | | |
| | ⇒ SSN | | | | | | |
| | Marital Status | -Select- | | | | | |
| | Subscriber Contact Information | | | | | | |
| | Contact Numbers | _ | -Select- | |] | | |
| | | _ | -Select- | | | | |
| | | _ | -Select- | | | | |
| | Mailing Address | | | | | | |
| | Mailing Apt/Suite | | | | | | |
| | □ Mailing City | | | | | | |
| | Mailing State, Zip | _ | ~ | | | | |



Are you apart of a managed care plan?

Managed Care Plans Must Select a Primary Care Provider

As part of a managed care plan, you must select a primary care provider (PCP) from our network. This is important because some health care services are only eligible for the highest benefits when your primary care provider does them.

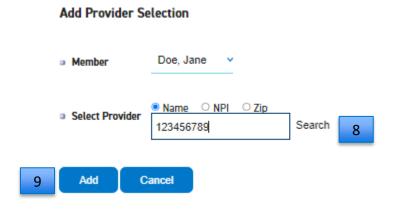
If your plan requires a primary care provider (PCP) a PCP must assigned to each member. A PCP must be assigned for each covered family member in order to enroll—unless subscriber or dependent resides outside of the Blue Cross VT network area (Vermont and contiguous counties).

7. If applicable, Select "edit" within the Subscriber Provider Information Summary to add a provider selection.

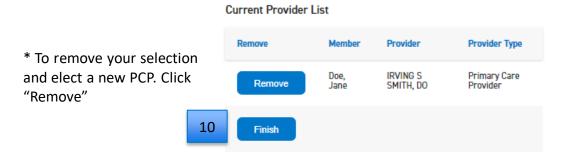




- 8. To select a provider add a value for the search criteria using, name, NPI or zip. Click "Search"
- 9. Once you have selected the provider. Click "add"

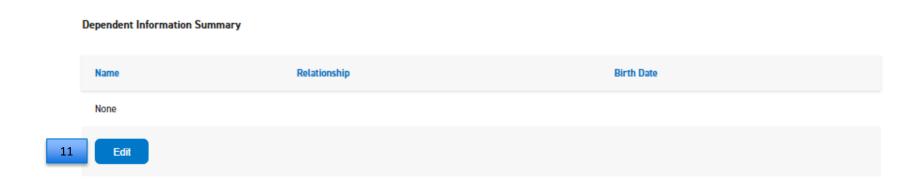


10. Once your 'Current Provider List' is populated. Click "Finish".





11. If applicable, complete Dependent Information Summary to add dependents to the policy by clicking on "Edit"



^{*}Dependents over 45, must have a Social Security Number to enroll

- 12. You will be required to provide the following fields:
- Subscriber Demographic information-First Name, Last Name, SSN, Martial Status, Gender and Birth Date.
- Subscriber Contact Information- Contact Numbers, Mailing Address, and Mailing City, State and Zip.

(Required fields are marked with the " 'symbol.)

| Add Or Modify Dependents 12 | | | December Control Information | | | | |
|--|------------|------------|------------------------------|----------|---|--|--|
| Dependent Contact Information Dependent Demographic Information | | | | | | | |
| | | | Contact Numbers | -Select- | ~ | | |
| □ First Name | | Gender | | -Select- | • | | |
| | | | | -Select- | v | | |
| Middle Name | | Birth Date | | | | | |
| | | | Mailing Address | | | | |
| Last Name | | | | | | | |
| | | | Mailing Apt/Suite | | | | |
| Suffix | | | | | | | |
| | | | Mailing City | | | | |
| SSN | | | | | | | |
| | Colort | | Mailing State, Zip | AA 🗸 | | | |
| Relationship | -Select- V | | | | | | |

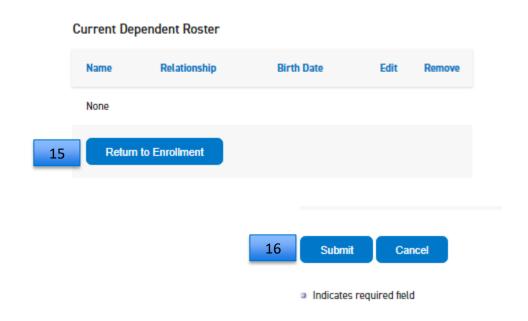
Are you apart of a managed care plan? If not, skip to step 14.

- 13. Select "edit" within the Subscriber Provider Information Summary to add a provider selection.
- 14. Select "Add or Modify Dependents" to add your dependent to the Current Dependent Roster





- 15. Click "Return to Enrollment"
- 16. Once everything is complete, on "Submit"

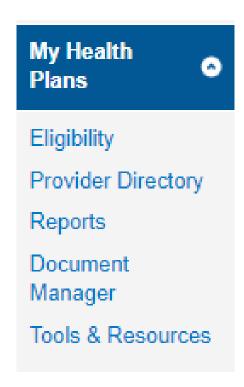




SECTION 5: MY HEALTH PLANS

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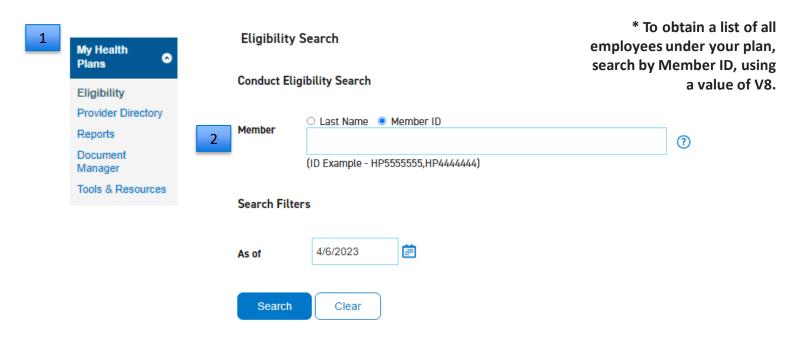
Within 'My Health Plans' you can perform the following actions:



- **Eligibility** search for all members, employees and their dependents
- Provider Directory find a network provider
- Reports run a membership roster or transaction report
- Document Manager store your historical reports
- Tools and Resources provides quick and easy access to frequently used links and information.

SECTION 5: MY HEALTH PLANS – ELIGIBILITY

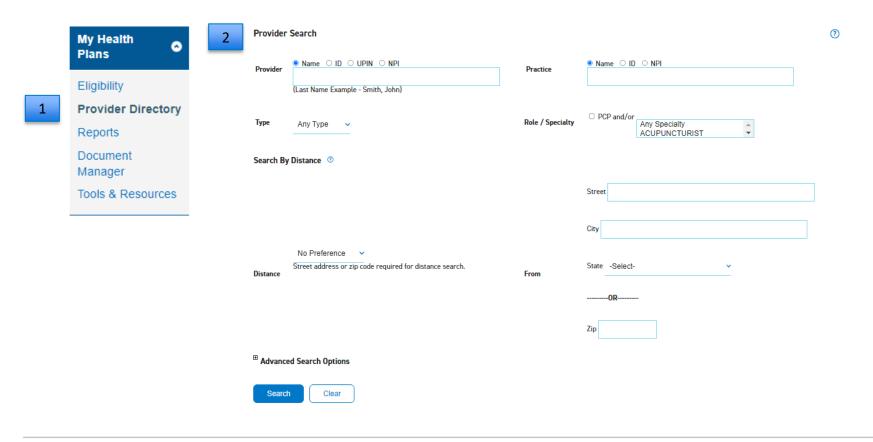
- 1. Click on "Eligibility", which allows you to search all members; both subscribers and dependents active and termed up to 18 months.
- 2. Use Eligibility Search to search by Last Name or Member ID. Include the "as of date" to narrow your results.





SECTION 5: MY HEALTH PLANS - PROVIDER DIRECTORY

- 1. Click on "Provider Directory", to find a network provider or PCP.
- 2. Use any of the search options within Provider Search to narrow down your results.

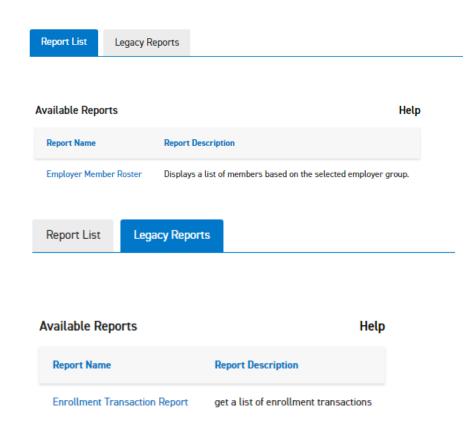




SECTION 5: MY HEALTH PLANS —REPORTS

1. Selecting "Reports" under My Health Plans will give you access to your Employer Member Roster and your Enrollment Transaction Report.

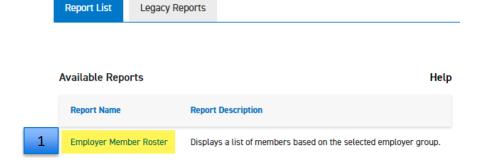






SECTION 5: MY HEALTH PLANS-REPORTS – EMPLOYER MEMBER ROSTER

1. Click on "Employer Member Roster."

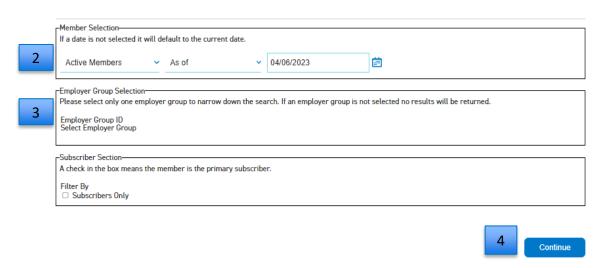




SECTION 5: MY HEALTH PLANS-REPORTS – EMPLOYER MEMBER ROSTER (CONT.)

- Set the parameters, (e.g. only 'Active Members' as of today's date or 'all members' as of 18 months in the past)
- You can select all divisions under your Group ID or for a specific division. 3.
- Once parameters are filled in, click continue 4.

Employer Member Roster



^{*}Search Employer Groups* Refine your search results by indicating only a division number under Group ID; this will bring up only the division you are looking for. OR to run the report by group number, add the first 4 digits of the group name under Name.



SECTION 5: MY HEALTH PLANS-REPORTS – EMPLOYER MEMBER ROSTER (CONT.)

5. You can download the report in .pdf or a .csv (Excel).

Report - Employer Member Roster



Member Roster by Employer

Employer Group Name:

Count of 2 Active Members

As of: April 06, 2023

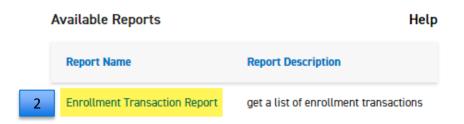


SECTION 5 MY HEALTH PLAN-REPORTS — ENROLLMENT TRANSACTION REPORT

1. Click on "Legacy Reports"

Report List Legacy Reports 1

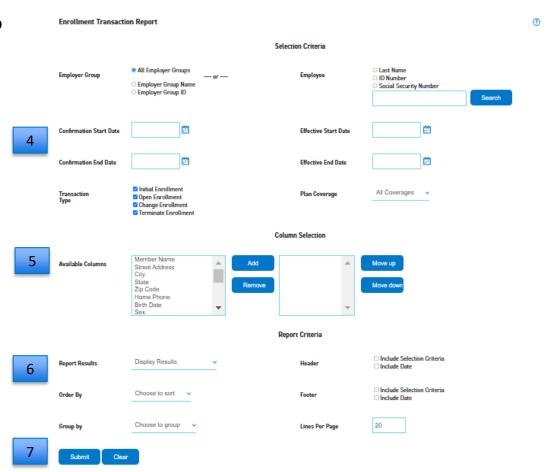
2. Click on "Enrollment Transaction Report"





SECTION 5: MY HEALTH PLANS-REPORTS – ENROLLMENT TRANSACTION REPORT (CONT.)

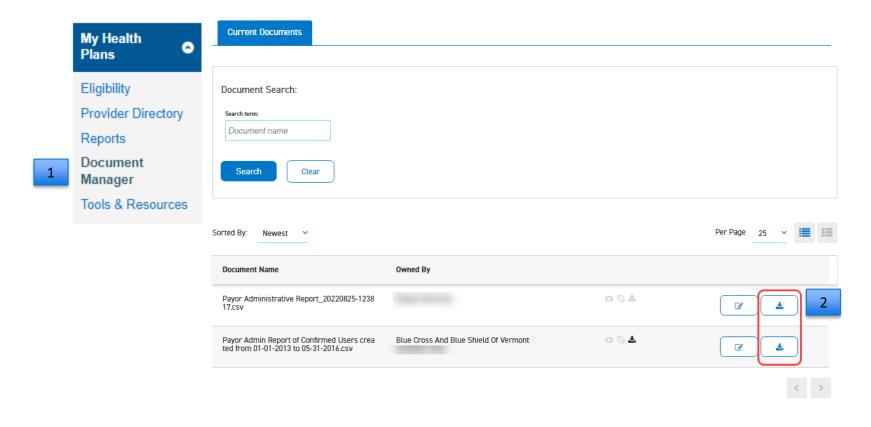
- Use the "Selection Criteria" to set your own filters. Set your search filters under "Search Criteria", "Colum Selection" and "Report Criteria"
- Set date filters by confirmation date or effective date within Search Criteria
- Select the columns you want to display within Column Selections
- 6. Indicate if you want the report as a .pdf or a .csv (Excel) within Report Results
- 7. Click Submit





SECTION 5: MY HEALTH PLANS- DOCUMENT MANAGER

- 1. Click on "Document Manager" in the left-hand navigation
- 2. Click on the download icon to view any your current documents



NEED SUPPORT OR HAVE QUESTIONS?

SECTION 6: NEED SUPPORT OR HAVE QUESTIONS?

- For assistance, contact Blue Cross's Enrollment Services Department:
 - By phone: (888) 320-9798; Option 2 for Large Group, and Option 3 for Small Group.
 - By Email: <u>asinbox@bcbsvt.com</u>