BROKER RESOURCE CENTER REFERENCE GUIDE

Enrollment Services



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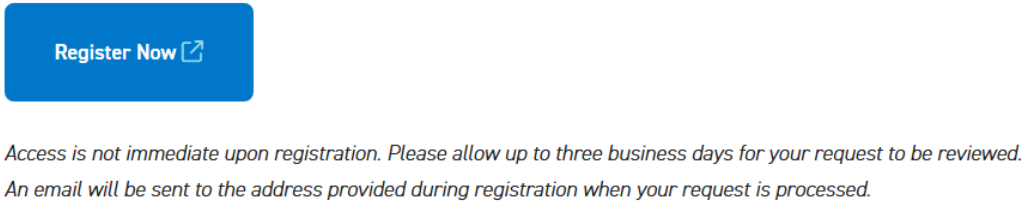
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SECTION 1: USER REGISTRATION

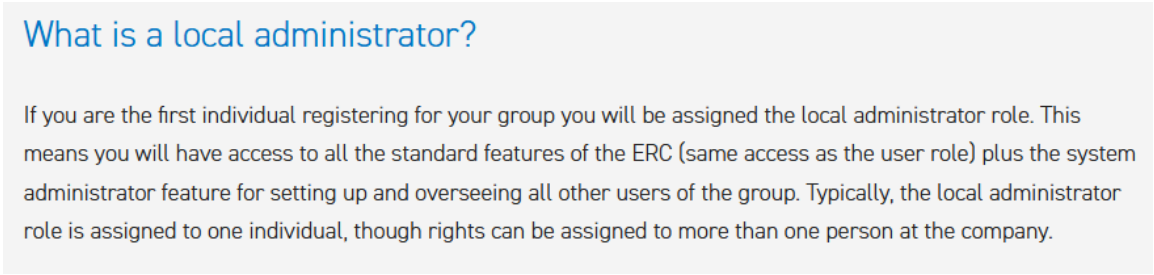
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SECTION 1: USER REGISTRATION

1. To start the registration process, go to www.bluecrossvt.org/employer-resource-center
2. Scroll down and select 'Register Now'



3. Confirm you are the appropriate person for the local administrator role. If you determine you are a user of the Employer Resource Center (ERC) but should not be a local administrator, please reach out to the group's current portal administrator.



SECTION 1: USER REGISTRATION

4. Enter the required User Information. **Be sure to take note of your username and password before clicking 'Next'.** Confirmation will be sent to the email address you provide.

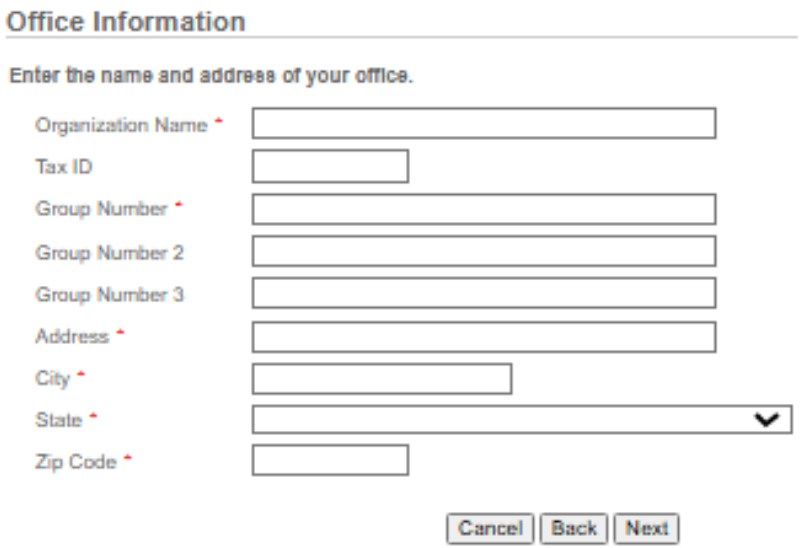


(Required fields are marked with the * symbol)

SECTION 1: USER REGISTRATION

5. Enter the required group information under the Office Information section.

   *Do not include hyphens (-) in the Tax ID field.



(Required fields are marked with the * symbol)

SECTION 1: USER REGISTRATION

6. Review your Registration Summary, verifying that Office Contact Info and User Information are correct. Select 'Back' if corrections are needed or if you did not take note of your username and password on the User Information screen. Once completed, select 'Finish'.

7. Registration Created- Keep a record of your User ID before clicking 'Next'. You will not be able to return to this page.

8. You have successfully completed your Blue Cross VT Employer Resource Center (ERC) registration! Once your request has been processed, you will receive an email advising if your registration has been approved or denied.

   Please note- ERC access is not immediately approved after registering. Please allow up to three business days for your registration request to be reviewed.

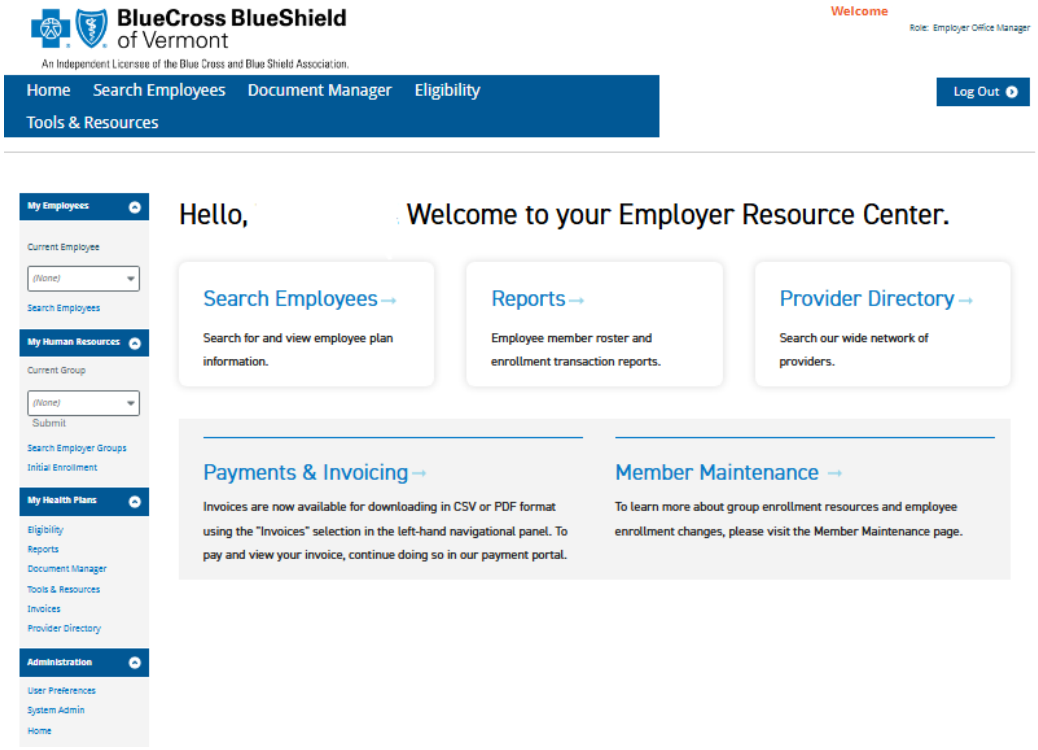


SECTION 2: HOMEPAGE

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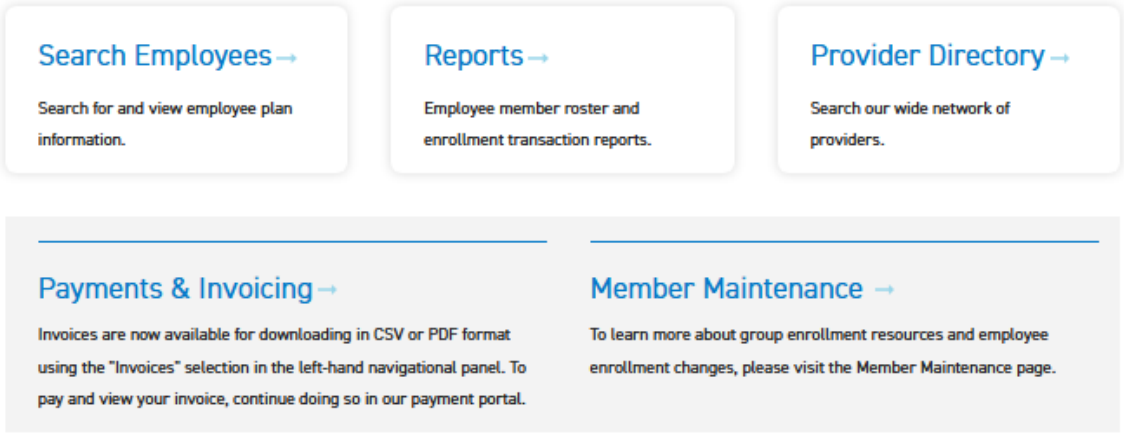
SECTION 2: HOMEPAGE

1. The homepage displays some of the most utilized functions within the portal and helps users navigate those quickly.
2. The left-hand navigation includes all options available to help you manage your groups, their covered employees and family members.

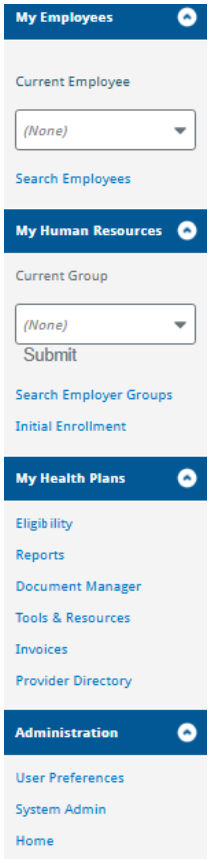


SECTION 2: HOMEPAGE OPTIONS

- **Search Employees -** Use to search for any members under your access list.
- **Reports -** Run various reporting such as, Employer Group Summary, Employer Member Roster, and Enrollment Transaction Report.
- **Provider Directory -** Access this tool to assist with finding a valid, network provider.
- **Payments & Invoicing -** To view a groups invoice in both PDF and CSV format, click on the 'Invoices' link under My Health Plans. The Payments & Invoicing link will bring you to the Online Payment Site.
- **Member Maintenance -** This link provides Blue Cross VT Membership Changes at a Glance information, frequently used forms, and other helpful enrollment resources.



SECTION 2: LEFT-HAND NAVIGATION



My Employees- Search for employees by last name or member ID to initiate changes or review benefits and eligibility.

My Human Resources- Search between your groups and divisions for benefit plans when initiating an initial enrollment request for new employees.

My Health Plans- Review a variety of tools to help manage your groups and their employees including, member eligibility, reporting, enrollment resources, and invoices.

Administration- Review and edit your user profile.

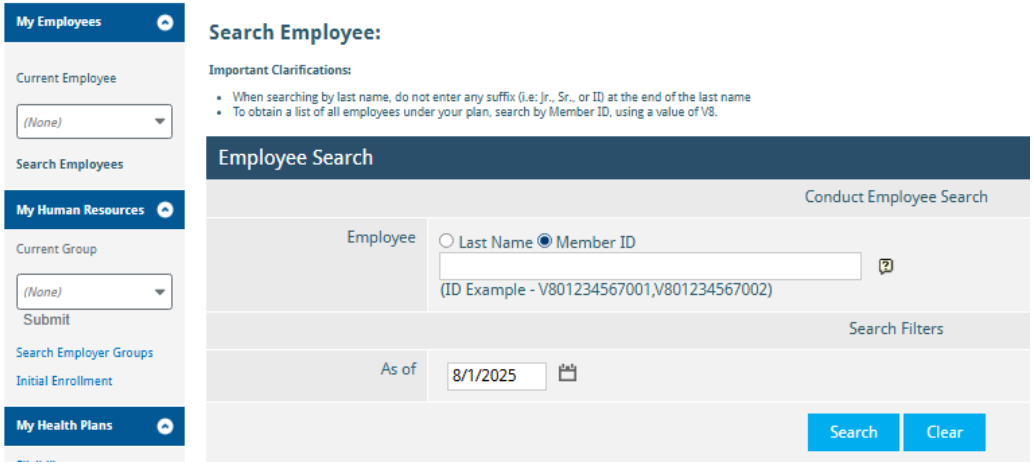
SECTION 3: MY EMPLOYEES

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SECTION 3: MY EMPLOYEES

Under ‘My Employees’, select ‘Search Employees’ and look up the employee you are updating either by Last Name or Member ID.

Please note- The ‘Current Employee’ dropdown will contain a list of the last 25 employee searches.



*To obtain a list of all employees, search by Member ID and enter a value of V8

SECTION 3: MY EMPLOYEES

Once you have selected the employee, you can perform the following actions located under My Employees in the left-hand navigation bar:

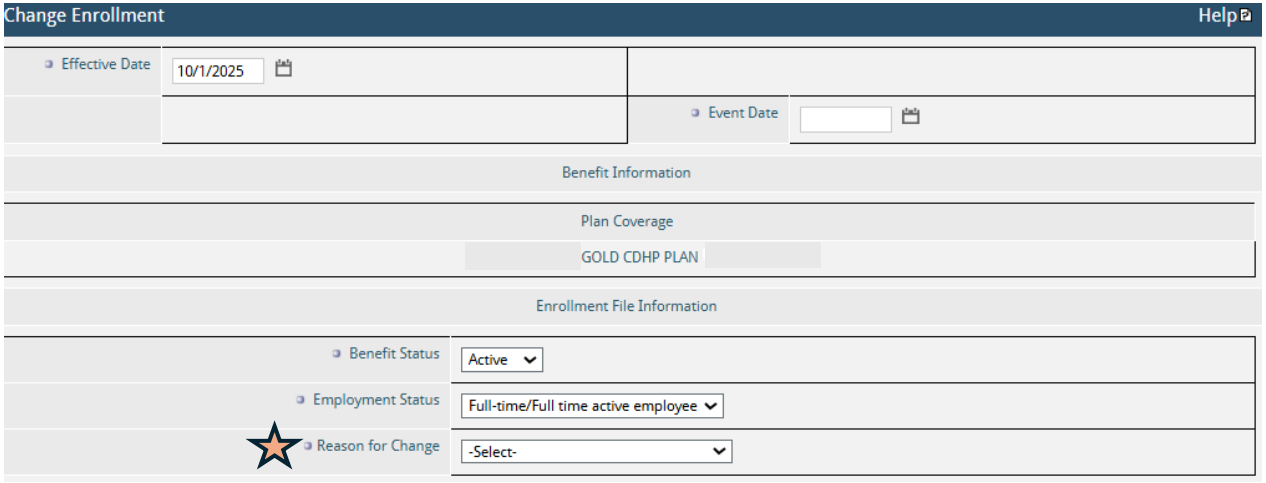
- **Employee Information -** Displays a high level summary of the employees' demographics and current benefit information.
- **Change Enrollment -** This allows you to make changes to the employees' contact information, update demographics or PCP, move from Active to COBRA coverage, and add/modify dependent information.
- **Terminate Enrollment -** This option allows you to terminate a subscriber or their covered family members. A valid reason for change must be selected.
- **Benefits and Eligibility -** On this page you can view subscriber demographics, as well as current benefit information. You can also request an ID or access the Outline of Coverage for the selected employee.
- **ID Card -** Provides options to request a new ID card or print proof of coverage for the subscriber or covered family members on their plan.

*Always make sure to have obtained the required documentation for your records when submitting a change through the Employer Resource Center.

SECTION 3: MY EMPLOYEES- CHANGE ENROLLMENT

Change Enrollment - This option allows you to make demographic changes for the selected employee, as well as manage life events. To successfully submit a change request, make sure that all required fields are completed and click 'Submit'.

* Once your request is submitted you should receive a confirmation message. If you do not see this or receive an error message, please refer to page 28 for additional information.



(Required fields are marked with the ° symbol)

*See the following page for more information on when to use each valid Reason for Change.

SECTION 3: MY EMPLOYEES- CHANGE ENROLLMENT

For additional information on membership changes, qualifying events, and eligibility periods please visit the Member Maintenance page on the Blue Cross VT website. This can also be accessed via the link provided under Tools & Resources in the left-hand navigation.

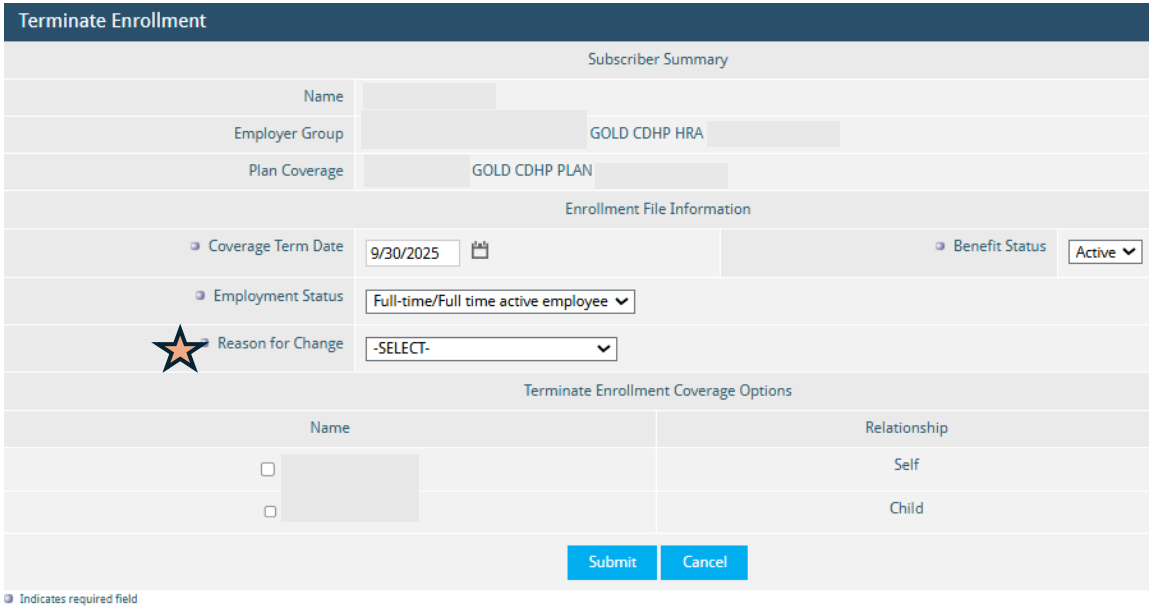
Valid Reason for Change options:

- **Birth -** Use to add a newborn for their 61st day of coverage. The effective date submitted should be the 1st day following the 60-day free coverage period. You can verify this date by searching for the newborn under Eligibility.
- **Change in Identifying Data Elements -** Use when submitting a demographic change (name, gender, DOB, contact information, etc.)
- **Change of Location -** Select when submitting an address change for an employee and any eligible dependents.
- **COBRA -** Use to move employee coverage from Active to COBRA status.
  **If the employee is still active, select Change Enrollment and indicate COBRA in Reason for Change. If the employee is termed refer to page 36 for additional information.*
- **Initial Enrollment -** Select when adding a new dependent to an employee's coverage.
- **Marriage -** Use to enroll a spouse to an employee's plan within the allowed eligibility period.
- **PCP Change -** Select to submit a PCP change for employees or dependents.

SECTION 3: MY EMPLOYEES- TERMINATE ENROLLMENT

Terminate Enrollment - This option allows you to terminate a selected subscriber or dependent(s). To successfully submit a termination request, make sure that all required fields are completed and click 'Submit'.

*Once your request is submitted you should receive a confirmation message. If you do not see this or receive an error message, please refer to page 28 for additional information.



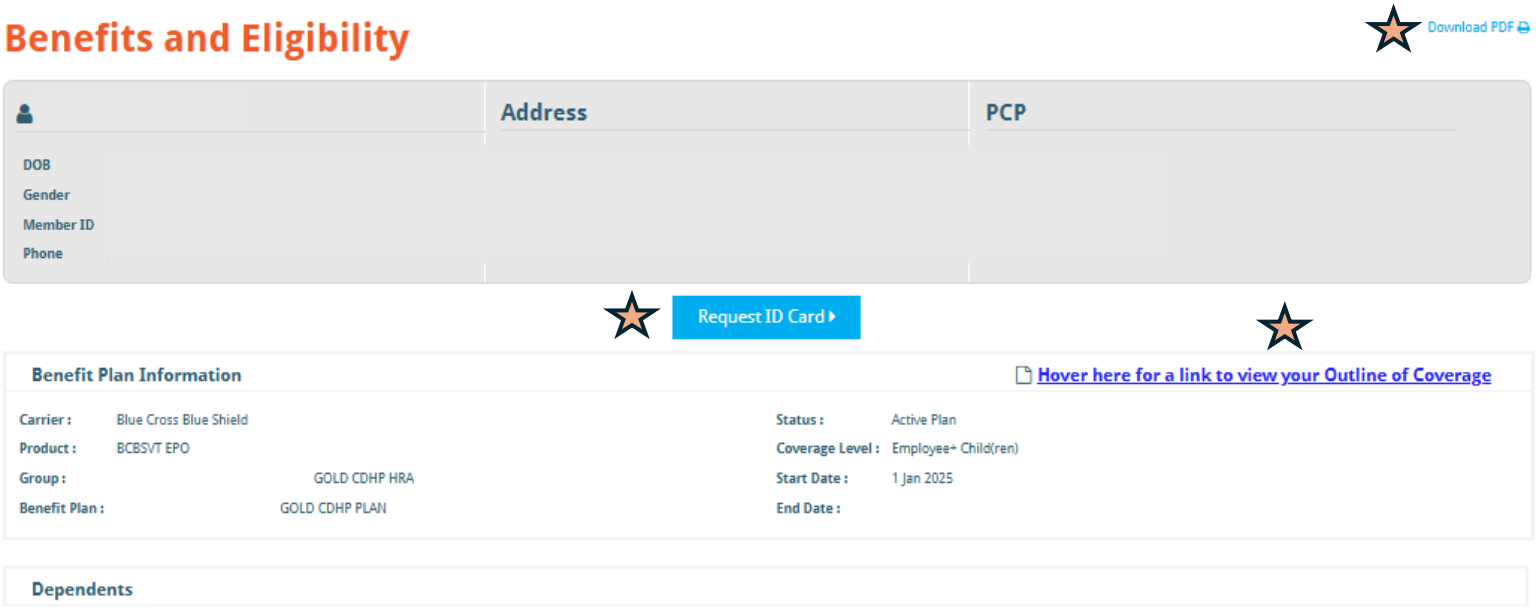
Valid termination Reasons for Change:

-Death
-Divorce
-Termination of Benefits
-Termination of Employment
-Voluntary Withdrawal

(Required fields are marked with the ° symbol)

SECTION 3: MY EMPLOYEES-BENEFITS AND ELIGIBILITY

Benefits and Eligibility - View a subscriber's current eligibility and benefits, request ID cards, or access their Outline of Coverage. You can also download this page as a PDF for your records.



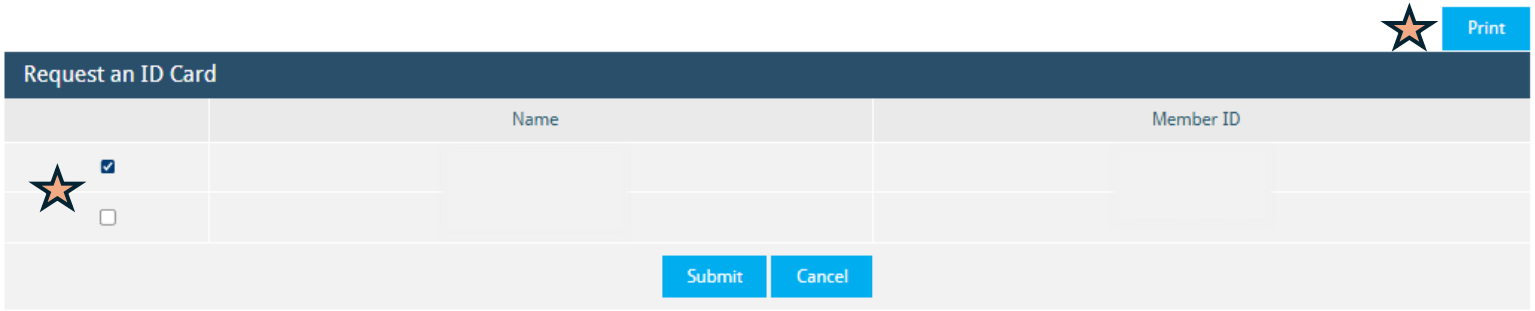
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SECTION 3: MY EMPLOYEES- ID CARD

ID Card - This is where you can order an ID card or print proof of coverage for employees and their dependents.

To request a new ID card, check the box next to the member(s) you would like to request one for, then click Submit. ID cards should be received in the mail within 7-10 business days.

To print a proof of coverage, click Print in the right-hand corner of the table. Then, on the next page, click the print button next to the member(s) in need of a copy.



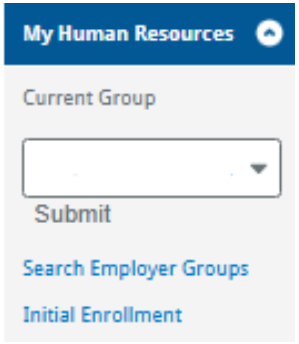
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SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

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SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

In order to submit an intital enrollment request, go to My Human Resources in the left-hand navigation and select the group/division in which you're enrolling the employee. Below are two options of how to perform this search, depending on the number of plans under your access.



Important notes:

- If you have more than 25 qualifying plans under your access list, or the group/ division is not showing in the dropdown, you should follow option 2.
- If a group has a separate COBRA group or the group offers COBRA benefit plans, and the employee is currently termed; You will want to select the COBRA specific group/ plan when electing COBRA as the Reason for Change.

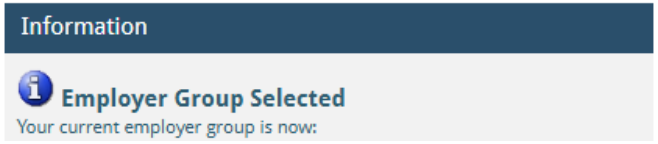
Option 1 - Under My Human Resources, use the Current Group dropdown. This will have a list of groups/ divisions that have recently been viewed. Select the applicable group and division, the page will automatically update to advise the group has been selected.

You can then select 'Initial Enrollment' under My Human Resources and proceed with enrolling the employee (see step 4).

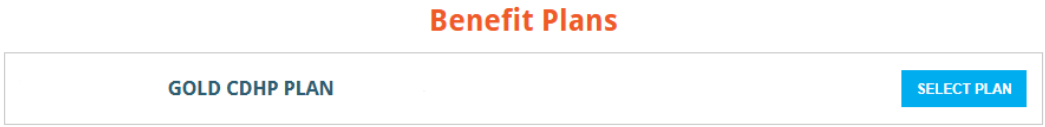
SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

Option 2 - Under My Human Resources, click on 'Search Employer Groups'. You will be prompted to enter the Name or Number of the group you are enrolling the employee in. If searching by Name you can enter the group name or the specific division you are enrolling the employee on, and click Search. If searching by Number you can enter either the first 4 or full 9 digit group ID, or the 9 digit group ID with the specific division for a more refined search.

1. Once your 'Current Group' is selected you will receive the message below, then click on 'Initial Enrollment' in the left-hand navigation bar.



2. Clicking on 'Initial Enrollment' will bring you to the Benefit Plans page. Click 'Select Plan' next to the benefit option in which you are enrolling the employee.



SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

3. Once a benefit is selected, the Benefit Enrollment screen provides two enrollment options under Reason for Change.
   Initial Enrollment - Use to add a new employee to your group plan, along with any eligible dependents.
   COBRA - Use to enroll a terminated employee onto COBRA coverage.
   **If the employee still has Active coverage and needs to be moved to COBRA coverage, refer to Section 3: My Employees.*

Effective dates must align with Blue Cross VT membership guidelines. Refer to our Membership Changes at a Glance reference page here for more information.

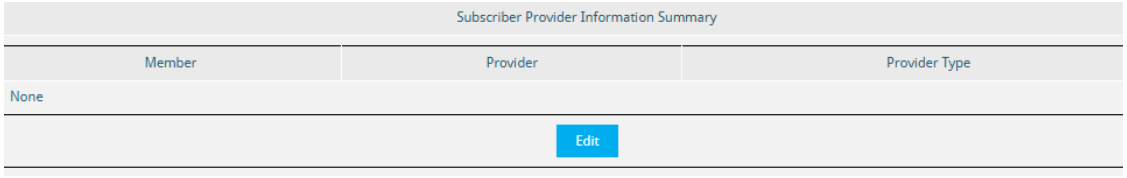
4. In order to successfully submit a request, you will need to make sure that all required fields are completed and accurate. Sections with required information include Effective and Hire Dates, Enrollment File Information, Subscriber Demographic and Contact Information.

   (Required fields are marked with the ° symbol)

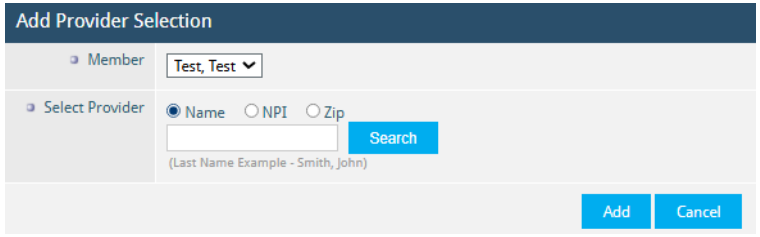
SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

5. If your group offers a managed care benefit then a valid, in network, primary care provider (PCP) must be selected. To add a provider selection, click ‘edit’ within the Subscriber Provider Information Summary.

   *If you need assistance finding a valid PCP to list, refer to the Provider Directory under My Health Plans in the left-hand navigation.



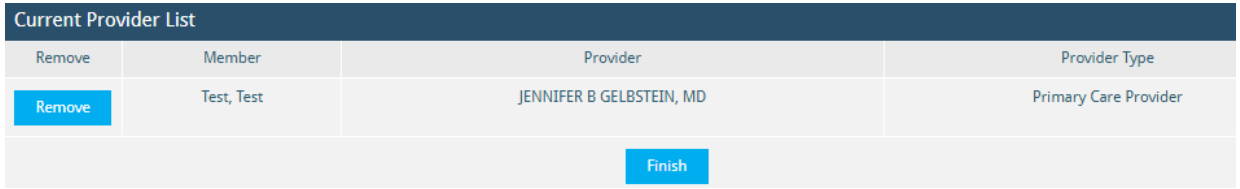
6. To select a provider, add a value for the search criteria using the providers Name, NPI, or Zip Code and and click ‘Search’. Once you have selected a valid provider, click ‘Add’.



SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

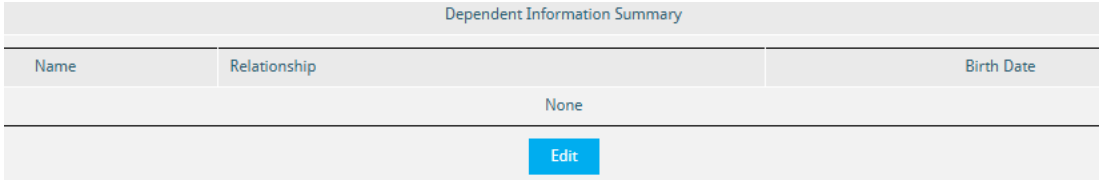
7. Once the 'Current Provider List' is populated, click 'Finish'. This will bring you back to the Benefit Enrollment screen where the provider information should be showing.

   *To remove a current selection and elect a new PCP, select 'Remove' in the Current Provider List screen.



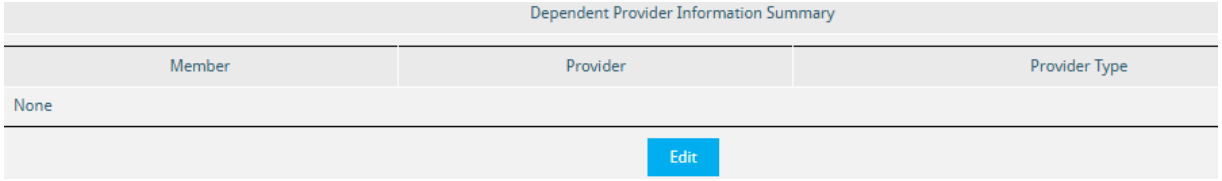
8. When applicable, complete the Dependent Information Summary to add eligible dependents to the policy by selecting 'Edit'.

   *Dependents over 45 must have a Social Security Number to enroll

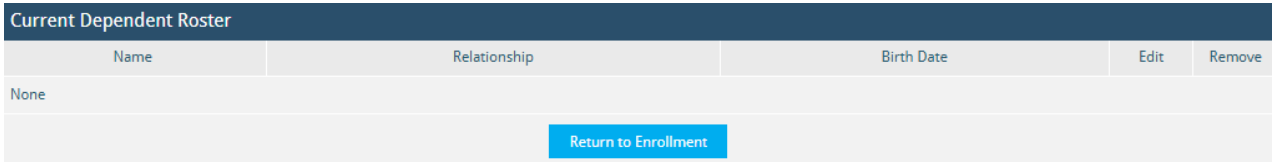


SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

9. You will need to enter all required dependent information.
   If enrolling a dependent onto a managed care benefit, a valid provider should also be selected within Dependent Provider Information Summary before clicking 'Add or Modify Dependents'.



10. Once added, the dependent(s) will show under the Current Dependent Roster.
    Click 'Return to Enrollment' and it will bring you back to the Benefit Enrollment screen.



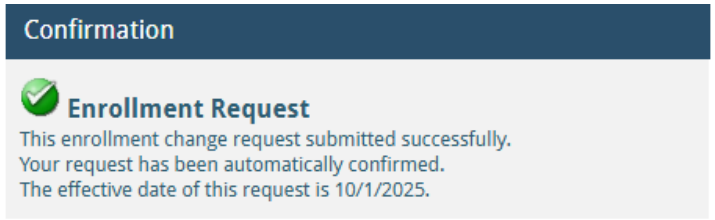
(Required fields are marked with the ° symbol)

SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

IMPORTANT: Once you have completed all required fields and select 'Submit', your request will be automatically confirmed and submitted to Blue Cross VT for processing. By submitting the transaction you are attesting to the following:

- You, the broker, 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. You are also attesting that, if applicable, you have retained any additional documentation required to process the enrollment request.
- The enrollment transaction adheres to the Group Benefits Policy for the Employer Group.

11. Once the enrollment is complete and you have verified all information is accurate, select 'Submit'. You should receive the message below indicating the request was successfully submitted.



*If you do not receive a confirmation message, the transaction has not been submitted. See the next page for additional steps to take.

SECTION 4: MY HUMAN RESOURCES – INITIAL ENROLLMENT

If you do not receive a confirmation message or you receive an error message after clicking 'Submit', you should contact Blue Cross VT either by phone at (888)320-9798 or email Enrollment@bcbsvt.com for assistance in getting your request processed.

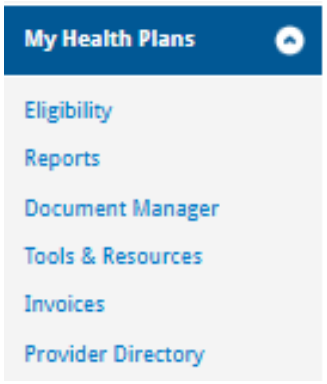
It can take 48-72 hours for membership updates to reflect in the portal. It is important that groups or brokers check the monthly invoice, Member Roster Report, or Enrollment Transaction Report to make sure the request was successfully submitted and processed. Proceed to the next section for more information on how to access these reports.

SECTION 5: MY HEALTH PLANS

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SECTION 5: MY HEALTH PLANS

Within My Health Plans in the left-hand navigation, you can perform the following actions:



Eligibility - Use to search for any members under your access list, employees and their dependents.

Reports - Run various reporting such as, Employer Group Summary, Employer Member Roster, and Enrollment Transaction Report.

Document Manager - A place to store and access any historical reports.

Tools & Resources - Frequently used links and information for quick and easy referencing.

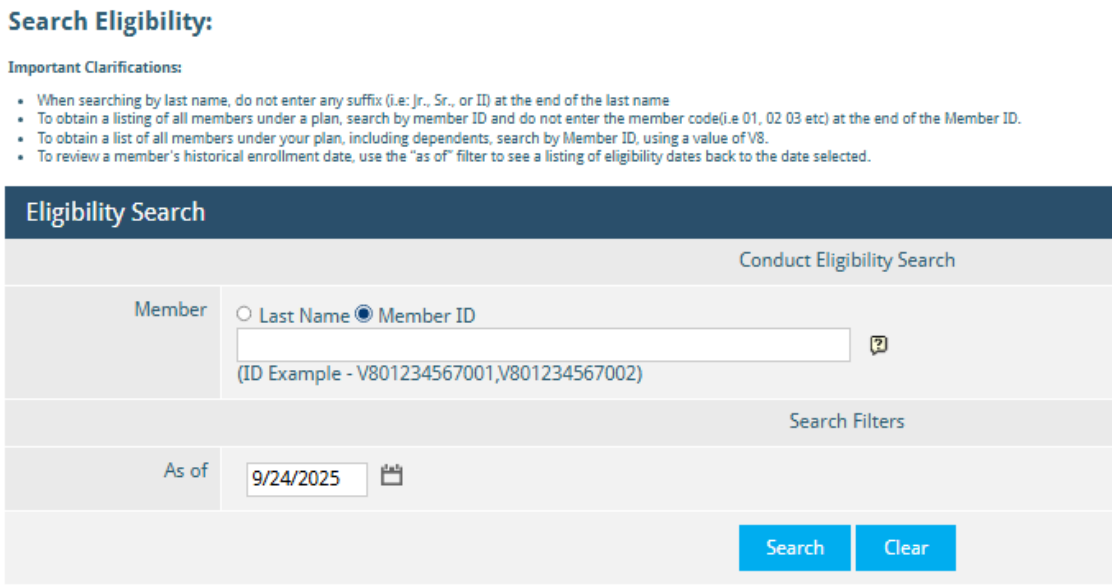
Invoices - View and download PDF or CSV versions of a groups premium bill invoice.

Provider Directory - Access this tool to assist with finding a valid, network provider.

SECTION 5: MY HEALTH PLANS – ELIGIBILITY

Select ‘Eligibility’ under My Health Plans. This function allows you to search for any active members (subscribers and dependents) covered by a group under your access, and former employees up to 18 months.

Use the Eligibility Search feature to search by Last Name or Member ID. To narrow down results you can include an ‘as of’ date.



*To obtain a list of all members, search by Member ID using a value of V8.

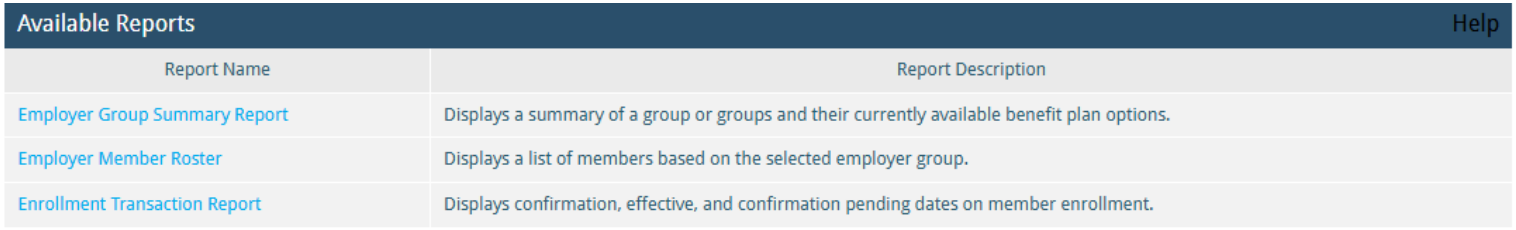
SECTION 5: MY HEALTH PLANS – REPORTS

Selecting 'Reports' under My Health Plans will bring you to reports available to assist with employee/ member auditing and transaction analysis. Available reports include,

Employer Group Summary Report - Displays a summary of your group(s) and the benefit plan options currently available.

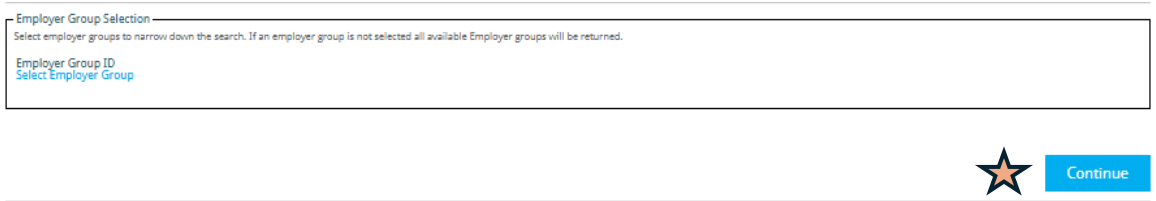
Employer Member Roster - Displays a list of employees based on the selected employer group.

Enrollment Transaction Report - Provides a list of submitted transactions based on search criteria entered.



SECTION 5: MY HEALTH PLANS – EMPLOYER GROUP SUMMARY REPORT

1. Once you select Employer Group Summary Report, you can click ‘Continue’ to show all employer groups and divisions under your access list.



2. To narrow down your search click ‘Select Employer Group’, here you can search either by Group Name or Group ID.
    - To search by Name enter the first four letters of the group name. To search by Group ID enter a specific group number without the 915.
3. In the list of available plans, find the one that shows just the Group ID in the Employer Group ID field (without the 4 digit division value). Once you locate the group record, click ‘Add’. Then select ‘Continue’ to view your search results.
4. You can download the results in either a PDF or CSV format by selecting the appropriate icon located under the ‘Back’ button at the top of the report.

SECTION 5: MY HEALTH PLANS – EMPLOYER MEMBER ROSTER REPORT

1. Once you select Employer Member Roster report you'll be directed to the search page. Set your search criteria before clicking 'Continue'.
   - **Member Selection -** Choose the applicable options from the dropdown menus. You can review for dates up to 18 months prior.
   - **Employer Group Selection -** Click 'Select Employer Group' and search by Group Name or Group ID to narrow the search results. Once you locate the group/ division you want to search with, click 'Add'.



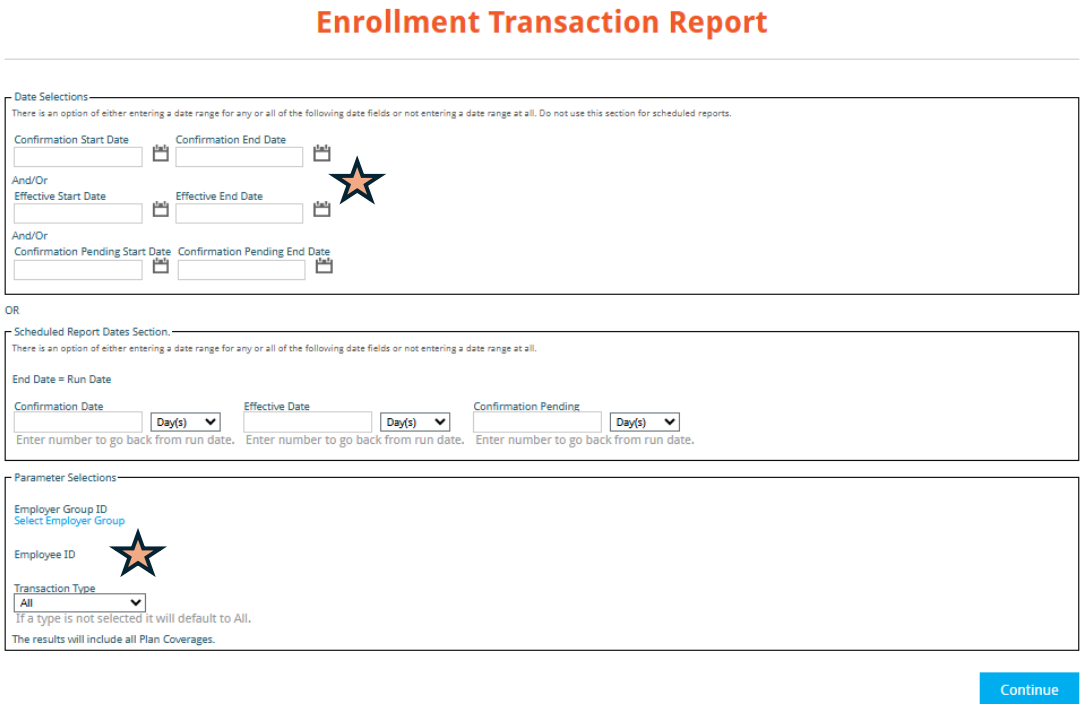
* If searching by Group ID, enter a specific group number (without 915) to see results with each division tied to that group ID. To narrow your search more, you can enter the group ID and the specific 4-digit division ID. To search by Group Name, enter the first four letters of the group name in the Name field.

2. You can download the results in either a PDF or CSV format by selecting the appropriate icon located under the 'Back' button at the top of the report.

SECTION 5: MY HEALTH PLANS – ENROLLMENT TRANSACTION REPORT

1. Once you select Enrollment Transaction Report you'll be directed to the page below. Set your search criteria, or leave it blank, before clicking 'Continue'.

   *Refer to the next page for additional information on Parameter Selections.



Date Selections (optional): Enter a start date or a date range in the Confirmation and/or Effective Date fields. This will show records matching or within those timeframes.

SECTION 5: MY HEALTH PLANS – ENROLLMENT TRANSACTION REPORT

Although not required, to assist with narrowing down search results and providing a more specific list of records, you can use the options available under **Parameter Selections**.

- **Select Employer Group -** If you have multiple groups under your access list, click here to search for and choose a specific group/division to view transactions for. Search by Group Name or Group ID to narrow the search results. Once you locate the group/ division you want to search with, click 'Add'.

  *To search by Name enter the first four letters of the group name. To search by Group ID enter a specific group number without the 915.

- **Transaction Type -** You can also define the search criteria by selecting a Transaction Type from the dropdown (All, Initial Enrollment, Open Enrollment, Change Enrollment, and Terminate Enrollment). If you leave the selection as 'All' it will show all results associated with the date(s) selected.

2. Once you click 'Continue' you should see a message advising that your report is processing. Please note that the results may not automatically generate. Once complete you can view the report under Document Manager. The report is available to download in both PDF and CSV formats.

SECTION 5: MY HEALTH PLANS – DOCUMENT MANAGER

Select ‘Document Manager’ under My Health Plans. This will bring you to a list of your current documents. From the list you can search for, view, and download any available documents.

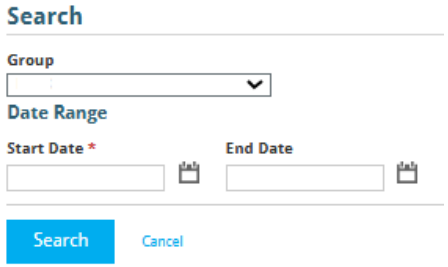


SECTION 5: MY HEALTH PLANS – INVOICES

Select ‘Invoices’ under My Health Plans. This will bring you to an information page which also includes a link to view and pay a bill, if applicable.

Important: Brokers will only be able to view invoices for groups enrolled in our Qualified Health Plans (QHP), Blue Edge, Fully Insured, and VEHI Member.

To view an invoice, click ‘Get Started’. On the search page, select the group you are viewing the invoice for from the Group dropdown and enter a start date or date range. Then click ‘Search’.



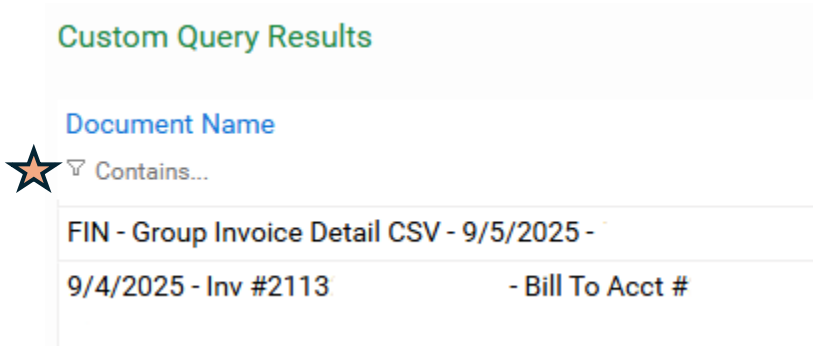
A separate browser tab (https://bcbs-vt.hylandcloud.com/appnet/docpop/docpop.aspx) will open and display a list of invoices that fit the search criteria provided.

SECTION 5: MY HEALTH PLANS – INVOICES

Invoices are available in both CSV (Excel) and PDF formats and indexed by Division ID/ Bill to Acct #.

- **PDF** copies begin with invoice date. This version is a copy of the mailed invoice sent each month.
- **CSV** copies begin with 'FIN- Group Invoice Detail CSV'. This document provides a list of each member by Division ID.

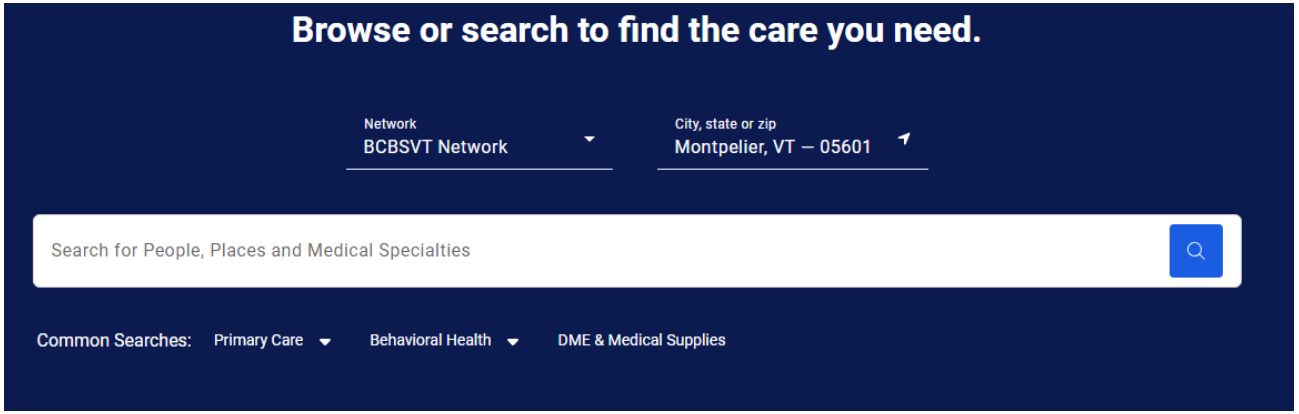
Filter options are located under 'Document Name' to assist with narrowing down search results. You can click on 'Document Name' to change the order in which the documents are displayed.



Double click on the document you want to select to view/ download.

SECTION 5: MY HEALTH PLANS – PROVIDER DIRECTORY

1. Click on ‘Provider Directory’ under My Health Plans for assistance with finding a valid, in network provider. You will be redirected to the site below where you can search for a provider by Network and City, State or Zip.



2. Once you click Search and have a list of results, you can continue to narrow down the results by applying filters until you find a suitable provider.



NEED SUPPORT OR HAVE QUESTIONS?

For assistance, please contact the Blue Cross VT Enrollment Services team:

- By phone at (888) 320-9798 (TTY/TDD: 711)
  Option 2 for Large Group, Option 3 for Small Group
- By email at Enrollment@bcbsvt.com

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