

EMPLOYER RESOURCE CENTER REFERENCE GUIDE

Enrollment Services



An Independent Licensee of the Blue Cross and Blue Shield Association.

TABLE OF CONTENTS

SECTION 1: USER REGISTRATION.....	3
SECTION 2: SYSTEM ADMIN – VIEWING USERS.....	8
SECTION 3: SYSTEM ADMIN – ADDING A NEW USER.....	10
SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION.....	16
SECTION 6: SYSTEM ADMIN – REMOVING USERS.....	19
SECTION 7: HOMEPAGE.....	22
SECTION 8: MY EMPLOYEES.....	26
SECTION 8: MY EMPLOYEES – CHANGE ENROLLMENT.....	29
SECTION 8: MY EMPLOYEES – TERMINATE ENROLLMENT.....	31
SECTION 8: MY EMPLOYEES – BENEFITS AND ELIGIBILITY.....	32
SECTION 8: MY EMPLOYEES – ID CARD	33
SECTION 9: MY HUMAN RESOURCES – INITIAL ENROLLMENT.....	34
SECTION 10: MY HEALTH PLANS.....	43
SECTION 10: MY HEALTH PLANS – REPORTS.....	46
SECTION 10: MY HEALTH PLANS – DOCUMENT MANAGER.....	51
SECTION 10: MY HEALTH PLANS – INVOICES	52
SECTION 10: MY HEALTH PLANS – PROVIDER DIRECTORY.....	54
NEED SUPPORT OR HAVE QUESTIONS?	55


SECTION 1: USER REGISTRATION



An Independent Licensee of the Blue Cross and Blue Shield Association.

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'

Register Now 

*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. If you determine you are a user of the Employer Resource Center (ERC) but should not be a local administrator, please reach out to your group's current portal administrator.

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.

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.

User Information

Registration should be completed by the Office Manager or main contact for the plan. By registering for an account, you will be considered the local administrator for your organization.

First Name *

Middle Initial

Last Name *

Title

E-mail Address *

Confirm E-Mail *

Office Phone *
Example: (555) 555-5555

Extension #
Example: 123456

Office Fax
Example: (555) 555-5555

User Name *

Password *
Password must contain at least 8 character(s).
Password cannot contain your user name.
Password cannot contain your First or Last Name.
You cannot re-use passwords previously used.
Password must have at least 1 number.
Password must be mixed case.

Confirm Password *

Security Question 1 * ▼

Security Answer 1 *
Your answer may not contain your username.

Security Question 2 * ▼

Security Answer 2 *
Your answer may not contain your username.

Security Question 3 * ▼

Security Answer 3 *
Your answer may not contain your username.

(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.

Office Information

Enter the name and address of your office.

Organization Name *	<input type="text"/>
Tax ID	<input type="text"/>
Group Number *	<input type="text"/>
Group Number 2	<input type="text"/>
Group Number 3	<input type="text"/>
Address *	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text" value="▼"/>
Zip Code *	<input type="text"/>

(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.

Registration Complete

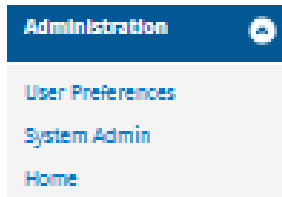
Thank you. Your registration with Blue Cross and Blue Shield of Vermont is now complete.

Next

SECTION 2: SYSTEM ADMIN – VIEWING USERS

SECTION 2: SYSTEM ADMIN – VIEWING USERS

1. Select “System Admin” from the lefthand menu. **Only the local administrator can view users.**



2. The User Maintenance screen will appear. This will list all users associated with your group's access list.

User Maintenance							
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
TestS Prod, TestM Prod	Main Office Contact					Confirmed	
Add User							

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

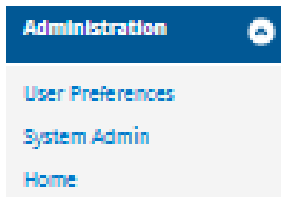


BlueCross.BlueShield.
of Vermont

An Independent Licensee of the Blue Cross and Blue Shield Association.

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

1. Select 'System Admin' from the lefthand menu. **Only the local administrator can add users.**



2. Once on the User Maintenance screen, select 'Add User'.

User Maintenance							
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
TestS Prod, TestM Prod	Main Office Contact	BlueCross Test				Confirmed	
Add User							

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

3. Enter all required information. You will need to create a username and password for the new user and provide the user with that information. The new user will be prompted to create a new password the first time they log in to their ERC user account.

User Information	
° First Name	<input type="text"/>
Middle Initial	<input type="text"/>
° Last Name	<input type="text"/>
° E-mail Address	<input type="text"/>
Title	<input type="text"/> <small>e.g., Office Manager</small>
° Office Phone	<input type="text"/>
Phone Ext	<input type="text"/>
Office Fax	<input type="text"/>
° Username	<input type="text" value="TestTest2025!"/>
° Password	<input type="password" value="*****"/>
Local Administrator:	<input type="checkbox"/>

° Indicates required field

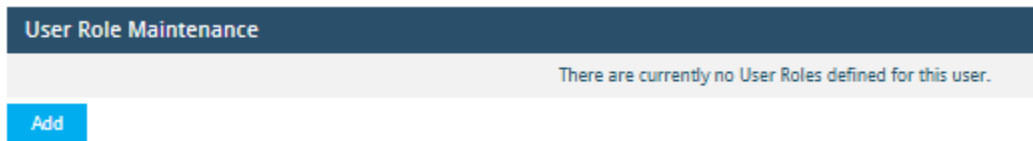
User Role Maintenance	
There are currently no User Roles defined for this user.	
<input type="button" value="Add"/>	

***Important Information:** You will need to assign a user role to the new user under User Role Maintenance. The user will not be added until a role is selected. Refer to the next steps for assistance.

(Required fields are marked with the ° symbol)

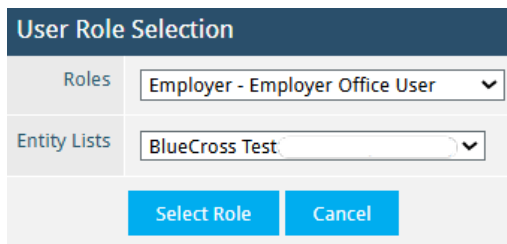
SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

4. To assign a user role to your new user, select 'Add' under User Role Maintenance.



The screenshot shows a 'User Role Maintenance' interface. It has a dark blue header with the text 'User Role Maintenance'. Below the header is a light gray box containing the text 'There are currently no User Roles defined for this user.' At the bottom left of the interface is a blue button with the text 'Add'.

5. In the Roles drop-down list, select the Employer Office User role for the new user and then confirm the Entity List reflects the correct group name. Then click 'Select Role'.



The screenshot shows a 'User Role Selection' interface. It has a dark blue header with the text 'User Role Selection'. Below the header is a light gray box containing two drop-down menus. The first menu is labeled 'Roles' and has 'Employer - Employer Office User' selected. The second menu is labeled 'Entity Lists' and has 'BlueCross Test' selected. At the bottom of the interface are two blue buttons: 'Select Role' and 'Cancel'.

Please note- The approved local administrator has the role of Employer Office Manager, new users should be added with the Employer Office User role.

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

6. Confirm all required information is entered accurately and click 'Submit'.

User Information

◉ First Name

Middle Initial

◉ Last Name

◉ E-mail Address

Title

e.g., Office Manager

◉ Office Phone

Phone Ext

Office Fax

◉ Username

TestTest2025

◉ Password

Local Administrator:

☐

Submit

◉ Indicates required field

User Role Maintenance

Blue Cross And Blue Shield Of Vermont

Blue Cross and Blue Shield of Vermont - Employer Portal

	Role	Entity List Name	Entity List ID	Registration Status
<input type="checkbox"/>	Employer Office User			Pending

AddRemove

(Required fields are marked with the ° symbol)

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

- After clicking 'Submit' you should receive the following popup listing the new user's information.

Registration Information for Blue Cross and Blue Shield of Vermont		
HealthTrio connect Office User List		
User Name	User ID	Office Security Level
Testing , Test		employer User

- If you click 'Return to User Maintenance', it will bring you back to the list of users associated with the group's access list. The new user should be listed in a Confirmed User Status.

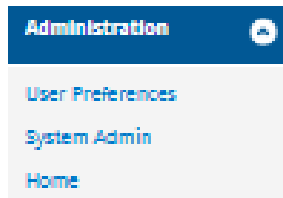
User Maintenance							
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Testing, Test	User					Confirmed	

Please note- The local administrator adding the new user should also receive a confirmation email from noreply@healthtrioconnect.com once the request is submitted.

SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION

SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION

1. Select 'System Admin' from the lefthand menu. **Only the local administrator can view users.**



2. Once on the User Maintenance screen you will see a list of all users under the group's access list. Select the User Name you would like to edit.

User Maintenance							
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Testing, Test	User					Confirmed	
TestS Prod, TestM Prod	Main Office Contact					Confirmed	
Add User							

SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION

3. Make the desired changes to the user information, then click “Submit”.

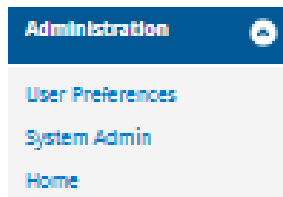
User Information	
° First Name	<input type="text"/>
Middle Initial	<input type="text"/>
° Last Name	<input type="text"/>
Time Zone:	<input type="text" value="America/New York"/>
° E-mail Address	<input type="text"/>
Title	<input type="text" value="e.g., Office Manager"/>
° Office Phone	<input type="text" value="(555) 555-5555"/>
Phone Ext	<input type="text"/>
Office Fax	<input type="text"/>
Local Administrator:	<input checked="" type="checkbox"/>
° Office Address	<input type="text"/>
° City	<input type="text"/>
° State Zip	<input type="text" value="VT"/> <input type="text"/>

(Required fields are marked with the ° symbol)

SECTION 6: SYSTEM ADMIN – REMOVING USERS

SECTION 6: SYSTEM ADMIN – REMOVING USERS

1. Select 'System Admin' from the lefthand menu. **Only the local administrator can remove users.**



2. On the User Maintenance page, you will see a list of all users under your group's access list. Select the User Name you would like to remove.


User Maintenance							
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Testing, Test	User					Confirmed	
TestS Prod, TestM Prod	Main Office Contact					Confirmed	
Add User							

SECTION 6: SYSTEM ADMIN – REMOVING USERS


3. Prior to removing a user, please confirm that the User Information is accurate. Under User Role Maintenance check the box next to the users Role, then click 'Remove'.

User Role Maintenance				
Blue Cross And Blue Shield Of Vermont				
Blue Cross and Blue Shield of Vermont - Employer Portal				
	Role	Entity List Name	Entity List ID	Registration Status
<input checked="" type="checkbox"/>	Employer Office User	BlueCross Test		Confirmed
<input type="button" value="Add"/> <input type="button" value="Remove"/>				

4. You will be prompted to provide the reason for removing the user, then click 'Yes'.




Verification

 **Are you sure you wish to remove this user?**
This action cannot be undone.
Removing the selected roles will remove the user's registration with Blue Cross and Blue Shield of Vermont.
A reason must be entered for this action.
Click the Yes button to continue.
Reason:

Indicates required field

An information box will appear confirming the user registration has been removed.

Information

 **User Registration Successfully Removed**
The user registration has been successfully removed.

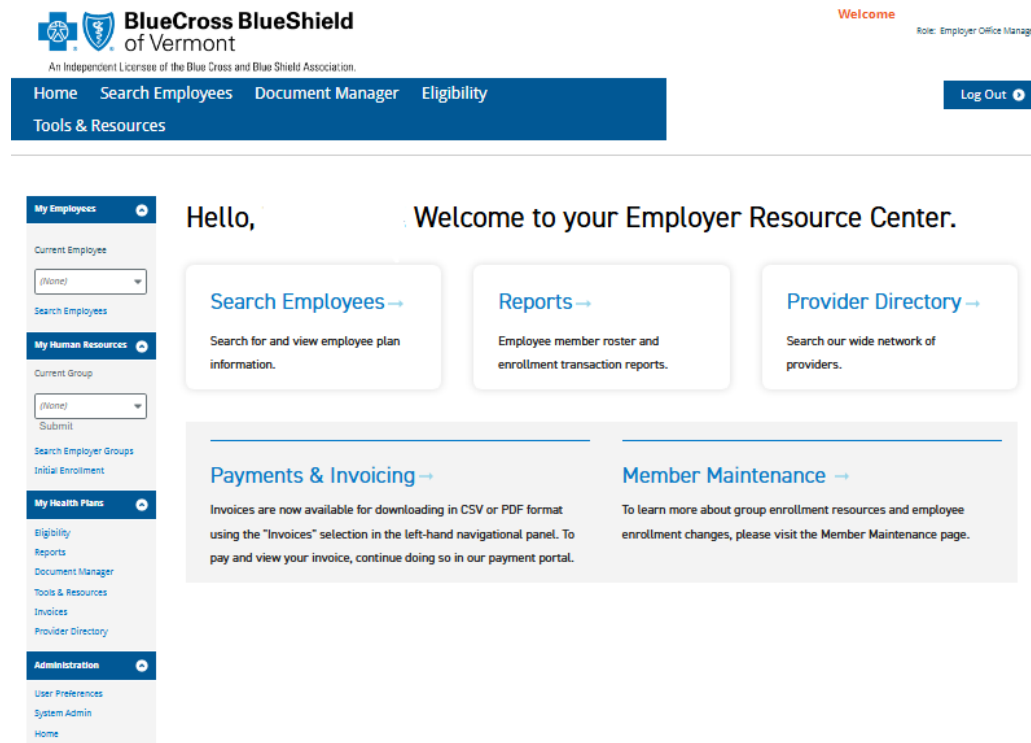
SECTION 7: HOMEPAGE



An Independent Licensee of the Blue Cross and Blue Shield Association.

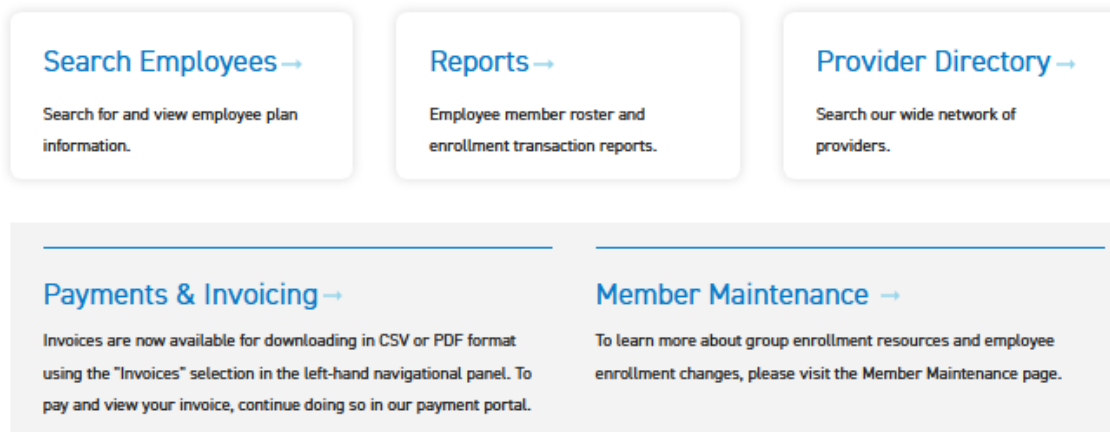
SECTION 7: HOMEPAGE

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



SECTION 7: 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 your 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 7: LEFT-HAND NAVIGATION

The screenshot shows a vertical navigation menu with four main sections, each with a blue header bar and a circular icon:

- My Employees** (Icon: person with plus)
 - Current Employee
 - Dropdown menu with "(None)" selected
 - Search Employees
- My Human Resources** (Icon: group of people)
 - Current Group
 - Dropdown menu with "(None)" selected
 - Submit
 - Search Employer Groups
 - Initial Enrollment
- My Health Plans** (Icon: document with plus)
 - Eligibility
 - Reports
 - Document Manager
 - Tools & Resources
 - Invoices
 - Provider Directory
- Administration** (Icon: gear)
 - User Preferences
 - System Admin
 - Home

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 group 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 group plan and employees including, member eligibility, reporting, enrollment resources, and invoices.

Administration- Review and edit your user profile, as well as manage additional users.

SECTION 8: MY EMPLOYEES



BlueCross.BlueShield.
of Vermont

An Independent Licensee of the Blue Cross and Blue Shield Association.

SECTION 8: 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.

My Employees

Current Employee
(None)

Search Employees

My Human Resources

Current Group
(None)

Submit

Search Employer Groups

Initial Enrollment

My Health Plans

Search Employee:

Important Clarifications:

- When searching by last name, do not enter any suffix (i.e.: Jr., Sr., or II) at the end of the last name
- To obtain a list of all employees under your plan, search by Member ID, using a value of V8.

Employee Search

Conduct Employee Search

Employee ☐ Last Name ☒ Member ID

(ID Example - V801234567001,V801234567002)

Search Filters

As of 8/1/2025

Search Clear

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

SECTION 8: 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 8: 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 42 for additional information.

Change Enrollment		Help
Effective Date	10/1/2025	
		Event Date
Benefit Information		
Plan Coverage		
GOLD CDHP PLAN		
Enrollment File Information		
Benefit Status	Active	
Employment Status	Full-time/Full time active employee	
Reason for Change	-Select-	

(Required fields are marked with the * symbol)

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

SECTION 8: 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.






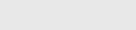
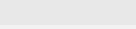
Valid Reason for Change options:


- **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 8: 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 42 for additional information.

Terminate Enrollment	
Subscriber Summary	
Name	
Employer Group	GOLD CDHP HRA
Plan Coverage	GOLD CDHP PLAN
Enrollment File Information	
Coverage Term Date	9/30/2025 
Benefit Status	Active 
Employment Status	Full-time/Full time active employee 
 Reason for Change	-SELECT- 
Terminate Enrollment Coverage Options	
Name	Relationship
<input type="checkbox"/> 	Self
<input type="checkbox"/> 	Child
<div>Submit Cancel</div>	

 Indicates required field

Valid termination Reasons for Change:

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

(Required fields are marked with the * symbol)

SECTION 8: MY EMPLOYEES – BENEFITS AND ELIGIBILITY

Benefits and Eligibility - View an employee'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.

Benefits and Eligibility



	Address	PCP
DOB Gender Member ID Phone		

[Request ID Card ▶](#)

Benefit Plan Information		Hover here for a link to view your Outline of Coverage
Carrier :	Blue Cross Blue Shield	Status : Active Plan
Product :	BCBSVT EPO	Coverage Level : Employee+ Child(ren)
Group :	GOLD CDHP HRA	Start Date : 1 Jan 2025
Benefit Plan :	GOLD CDHP PLAN	End Date :


Dependents


SECTION 8: 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.

[Print](#)

Request an ID Card		
	Name	Member ID
 <input checked="" type="checkbox"/>		
<input type="checkbox"/>		
Submit		Cancel

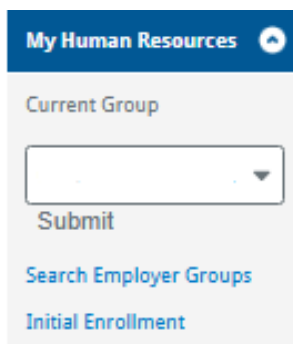
SECTION 9: MY HUMAN RESOURCES – INITIAL ENROLLMENT



An Independent Licensee of the Blue Cross and Blue Shield Association.

SECTION 9: MY HUMAN RESOURCES – INITIAL ENROLLMENT

In order to submit an initial 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.

The screenshot shows a web interface for 'My Human Resources'. At the top is a blue header with the text 'My Human Resources' and a circular icon. Below this is a light gray box containing the text 'Current Group' above a dropdown menu. The dropdown menu is currently empty. Below the dropdown is a 'Submit' button. At the bottom of the gray box are two links: 'Search Employer Groups' and 'Initial Enrollment', both in blue text.

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 you have a separate COBRA group or your group offers COBRA benefit plans, and your employee is currently termed; You will want to select the COBRA specific group/ plan when electing COBRA as the Reason for Change.

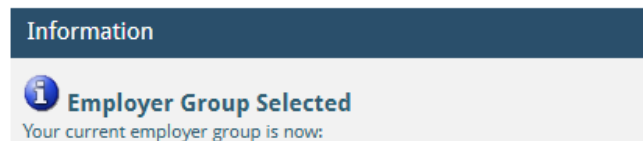
Option 1 - Under My Human Resources, use the Current Group dropdown. This will have a list of groups/ divisions that have recently been viewed. Select the applicable group and division, the page will automatically update to advise the group has been selected.

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

SECTION 9: MY HUMAN RESOURCES – INITIAL ENROLLMENT

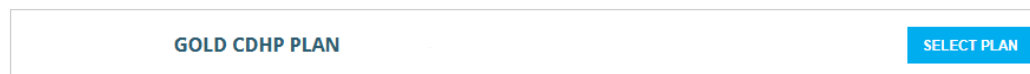
Option 2 - Under My Human Resources, click on 'Search Employer Groups'. You will be prompted to enter the Name or Number of the group you are enrolling the employee in. If searching by Name you can enter the group name or the specific division you are enrolling the employee on, and click Search. If searching 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.

Benefit Plans



SECTION 9: 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 8: 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 9: 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.

Subscriber Provider Information Summary		
Member	Provider	Provider Type
None		
Edit		

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'.

Add Provider Selection

Member

Test, Test

Select Provider

☒ Name ☐ NPI ☐ Zip

(Last Name Example - Smith, John)

[Search](#)

[Add](#)

[Cancel](#)

SECTION 9: MY HUMAN RESOURCES – INITIAL ENROLLMENT

- 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.

Current Provider List			
Remove	Member	Provider	Provider Type
Remove	Test, Test	JENNIFER B GELBSTEIN, MD	Primary Care Provider
Finish			

- 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

Dependent Information Summary		
Name	Relationship	Birth Date
None		
Edit		

SECTION 9: 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'.

Dependent Provider Information Summary		
Member	Provider	Provider Type
None		
		Edit

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.

Current Dependent Roster				
Name	Relationship	Birth Date	Edit	Remove
None				
			Return to Enrollment	

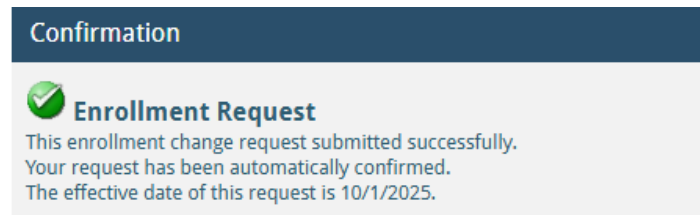
(Required fields are marked with the ° symbol)

SECTION 9: 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 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. 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 your 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 9: 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 you check your 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.

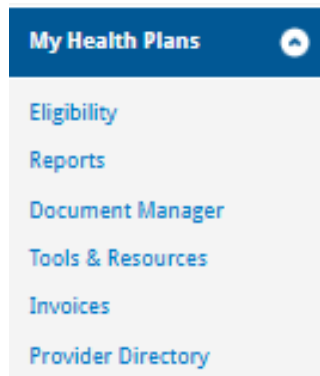
SECTION 10: MY HEALTH PLANS



An Independent Licensee of the Blue Cross and Blue Shield Association.

SECTION 10: 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 your groups premium bill invoice.

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

SECTION 10: MY HEALTH PLANS – ELIGIBILITY

Select 'Eligibility' under My Health Plans. This function allows you to search for any active members (subscribers and dependents) under your group, 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.

Search Eligibility:

Important Clarifications:

- When searching by last name, do not enter any suffix (i.e: Jr., Sr., or II) at the end of the last name
- To obtain a listing of all members under a plan, search by member ID and do not enter the member code(i.e 01, 02 03 etc) at the end of the Member ID.
- To obtain a list of all members under your plan, including dependents, search by Member ID, using a value of V8.
- To review a member's historical enrollment date, use the "as of" filter to see a listing of eligibility dates back to the date selected.

Eligibility Search	
Conduct Eligibility Search	
Member	<div><input type="radio"/> Last Name <input checked="" type="radio"/> Member ID</div> <div><input type="text"/> (ID Example - V801234567001,V801234567002)</div>
Search Filters	
As of	<div><input type="text" value="9/24/2025"/> </div>
<div>Search Clear</div>	

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

SECTION 10: 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.

Available Reports		Help
Report Name	Report Description	
Employer Group Summary Report	Displays a summary of a group or groups and their currently available benefit plan options.	
Employer Member Roster	Displays a list of members based on the selected employer group.	
Enrollment Transaction Report	Displays confirmation, effective, and confirmation pending dates on member enrollment.	

SECTION 10: 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.

Employer Group Selection

Select employer groups to narrow down the search. If an employer group is not selected all available Employer groups will be returned.

Employer Group ID

Select Employer Group

 [Continue](#)

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 10: 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'.

Employer Member Roster

Member Selection
If a date is not selected it will default to the current date.

Active Members

As of

09/29/2025

Employer Group Selection
Select only one employer group to narrow down the search. If an employer group is not selected all Employer groups will be returned.

Employer Group ID

Select Employer Group

Subscriber Section
A check in the box means the member is the primary subscriber.

Filter By

☐

Subscribers Only

* 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.

Continue

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 10: 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.

Enrollment Transaction Report

Date Selections

There is an option of either entering a date range for any or all of the following date fields or not entering a date range at all. Do not use this section for scheduled reports.

Confirmation Start Date

Confirmation End Date

And/Or


Effective Start Date

Effective End Date

And/Or

Confirmation Pending Start Date

Confirmation Pending End Date



OR

Scheduled Report Dates Section

There is an option of either entering a date range for any or all of the following date fields or not entering a date range at all.

End Date = Run Date

Confirmation Date

Day(s)

Effective Date

Day(s)

Confirmation Pending

Day(s)

Enter number to go back from run date. Enter number to go back from run date. Enter number to go back from run date.

Parameter Selections

Employer Group ID

Select Employer Group


Employee ID

Transaction Type

All

If a type is not selected it will default to All.

The results will include all Plan Coverages.



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.

Continue

SECTION 10: 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 10: 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.

Current Documents

Document Search:

Search term:

Search

Clear

Sorted By:

Newest

Per Page:

25

Document Name

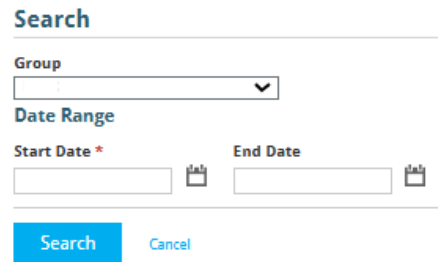
Owned By

SECTION 10: 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 to your group.

Important: Only groups enrolled in our Qualified Health Plans (QHP), Blue Edge, Fully Insured, and VEHI Member groups can view invoices in the ERC.

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'.



The screenshot shows a search form titled "Search". It includes a "Group" dropdown menu, a "Date Range" section with "Start Date" and "End Date" fields (each with a calendar icon), and a blue "Search" button next to a "Cancel" link.


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 10: 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.

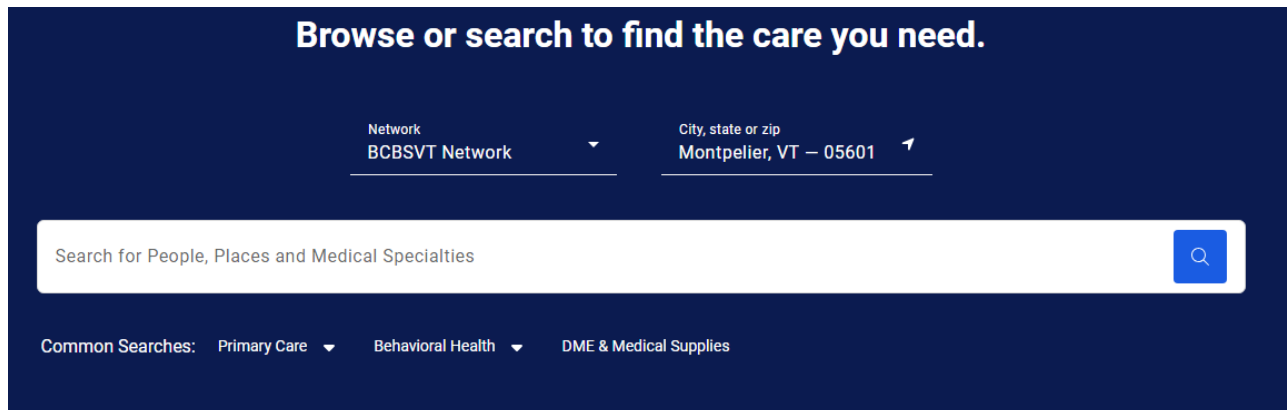
Filter options are located under 'Document Name' to assist with narrowing down search results. You can click on 'Document Name' to change the order in which the documents are displayed.

Custom Query Results	
Document Name	
 Contains...	
FIN - Group Invoice Detail CSV - 9/5/2025 -	
9/4/2025 - Inv #2113	- Bill To Acct #

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

SECTION 10: 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.



The screenshot shows a dark blue search interface. At the top, it says "Browse or search to find the care you need." Below this are two dropdown menus: "Network" with "BCBSVT Network" selected, and "City, state or zip" with "Montpelier, VT – 05601" selected. Below these is a large white search bar with the placeholder text "Search for People, Places and Medical Specialties" and a blue search button with a magnifying glass icon. At the bottom, there are "Common Searches:" links for "Primary Care", "Behavioral Health", and "DME & Medical Supplies", each with a dropdown arrow.

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.



The screenshot shows a horizontal filter bar with several buttons: "All Filters" (with a filter icon), "Distance" (with a dropdown arrow), "People or Places" (with a dropdown arrow), "Accepting New Patients", "Medical Specialties" (with a dropdown arrow), "Provider Gender" (with a dropdown arrow), and "Sort By" (with a dropdown arrow).

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 Groups
- By email at Enrollment@bcbsvt.com



An Independent Licensee of the Blue Cross and Blue Shield Association.