BlueCross BlueShield of Vermont

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Employer Resource Center Training Guide

Version 4
April, 2020

Overview

Purpose:

The purpose of this Training Guide is to provide you with some basic information on how to use the Blue Cross & Blue Shield of Vermont (BCBSVT) Employer Resource Center (ERC).

URL:

www.bcbsvt.com/erc

What if I have any questions?

If you have questions while navigating our ERC, please contact our Enrollment Services Department for assistance. Call 1-888-320-9798 Monday through Friday from 8AM to 4:30PM.

Contents:

This Employer Resource Center Training Guide contains the following information:

Features:

*My Profile
*My Accounts
*Online Transactions

My Profile:

My profile allows you to view and maintain information about your login, as well as allowing you to add other staff (assistants) to access the information in the Employer Resource Center.

My Accounts:

My Accounts allows you to view your group and account information, employee and dependent demographics, invoices, and ability to perform employee and dependent changes.

Online Transactions:

Online Transactions is a function available from My Accounts that allows you to easily service your employees without having to take the time to mail or email paperwork to us. The following transactions are available from the site:

- New Enrollments (new hire, rehire, or loss of coverage)
- Enroll Dependents
- Cancel Coverage
- Demographic Changes (address, phone, name etc)
- Order ID cards
- Print temporary proof of coverage
- Download a group census
- View Invoices

Registering in the Employer Resource Center

Before you begin:

Before you can begin using the Employer Resource Center, you must have access and open your internet browser (compatible with Google Chrome).

Use the following URL address to access the BCBSVT Employer Site:
www.bcbsvt.com/erc

How to register:

Follow the steps below to get started using our Employer Resource Center.

<table>
<tr><th>Step</th><th>See Page</th></tr>
<tr><td>1.</td><td>Go to www.bcbsvt.com and click log in >Employer as shown below:

</td></tr>
<tr><td>2.</td><td>Use the 'Not registered yet?' section to register as shown below:

Not registered yet?

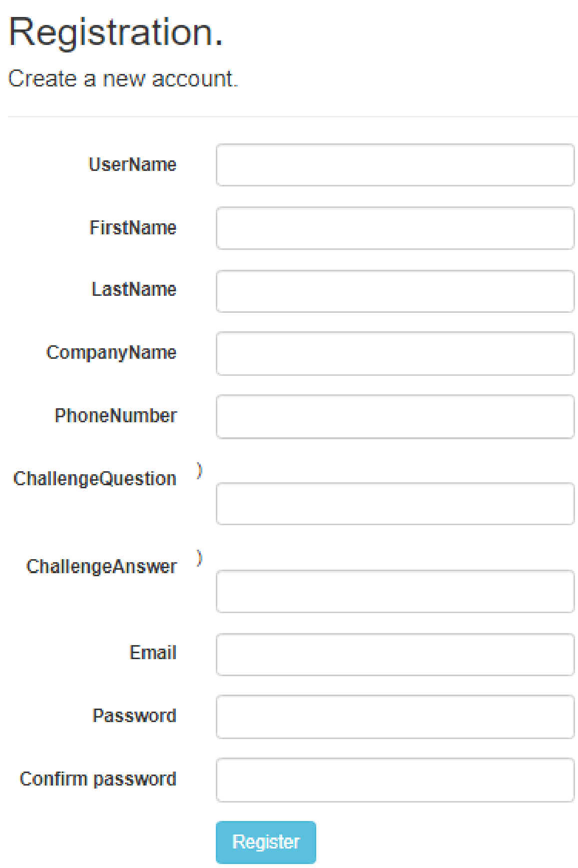
Our secure Employer Resource Center (ERC) allows businesses enrolled in a BCBSVT plan to conveniently manage their health plan and membership online, including:

• Add new enrollments
• Add/remove dependents
• Cancel coverage
• Verify your plan membership and download a roster
• Update employee/dependent demographics
• Order ID cards or print a temporary proof of coverage
• View and pay monthly invoices online
• Review your plan benefits
• Print benefit summaries

Register</td></tr>
</table>

Registering with the Employer Resource Center continued,

<table>
<tr><td>3.</td><td>Enter the requested information into the registration fields and click ‘register’.



</td></tr>
<tr><td>4.</td><td>Once BCBSVT has validated you are an authorized contact, your request will be approved. You will then receive an email with a hyperlink and RSVP code.</td></tr>
<tr><td>5.</td><td>When the registration RSVP page opens, enter the RSVP code sent to you in the confirmation email and click submit. This will enable you to log in with the username and password created at the time of registration.</td></tr>
</table>

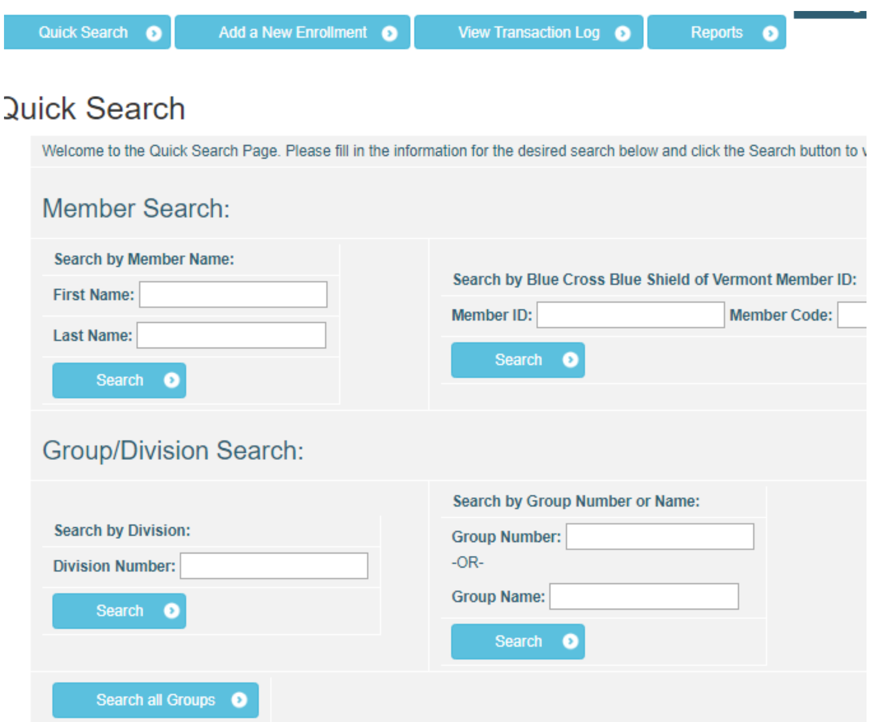
Viewing My Accounts Information

How to View My Accounts:

After logging into the Employer Resource Center, follow the steps in table below to view My Accounts information.

<table>
<tr><td>1.</td><td>Click on My Accounts to access your account information.

</td></tr>
<tr><td>2.</td><td>Use the Quick Search page to search for specific members, group, or divisions.



</td></tr>
<tr><td>3.</td><td>By entering group or member details you can obtain additional information about effective dates, benefit information, demographic information and more.</td></tr>
</table>

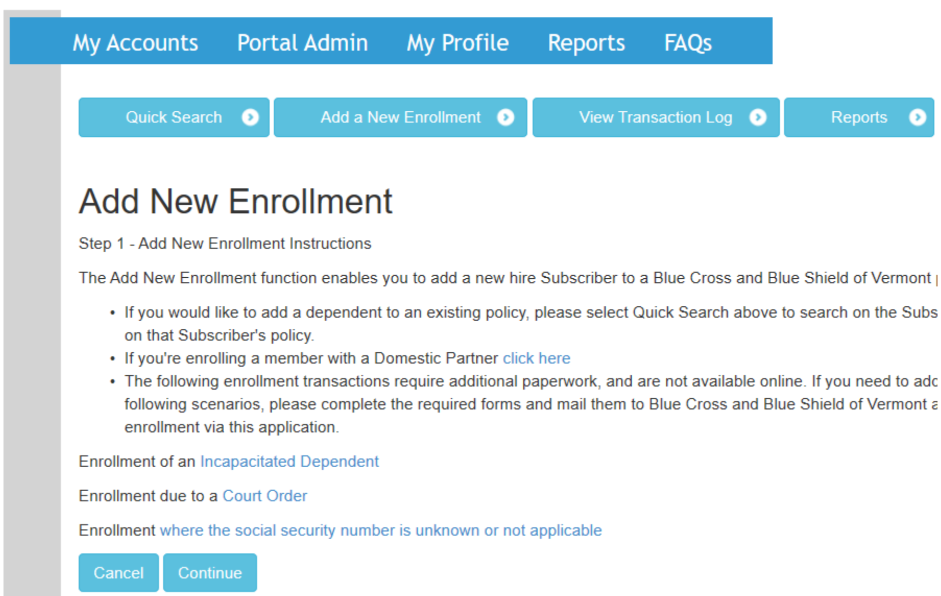
Add New Enrollment

Policy:

New enrollments may be accepted via My Accounts for new hires, loss of coverage event, or open enrollment. Please refer to your Employer Group's probationary period eligibility rules for waiting periods and dates in order to determine the effective date. Please advise that you must keep a copy of the paper form with the employee's signature for your records.

*** Please note during open enrollment, although new adds and cancels are eligible events to be completed in our portal. Transfer of division or plan options is unable to be completed in the portal. ***

How to Add New Enrollment:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click on the Add New Enrollment tab from any page after the Quick Search page. The Add Enrollment instruction page displays. Please review for any restrictions to your enrollment and select Continue to enter your new enrollment.


*Please note enrollment exclusions under Add New Enrollment Instructions. *</td></tr>
<tr><td>2.</td><td>Follow the steps to completing the required fields (*) for your new enrollment application. You will need the following information.
• Subscriber demographic information
• Employment information
• Dependent information
• Primary Care Provider (managed care policies only).</td></tr>
</table>

	• Other coverage information (if applicable).
3.	Enter signature as it displays in your profile, and click Submit.

Rehire or Reinstatement

Are you processing a Rehire or Reinstatement?

If yes, and that individual's coverage is showing cancelled you may search for the subscriber from the Quick Search screen and choose Rehire or Reinstate from the drop-down listing.

The Subscriber information will be pre-populated for your convenience. Follow the same steps outlined above for enrolling a New Add.

*Use Reinstate when enrolling an employee onto Continuation of Coverage (COBRA/VIPER). *

Adding Dependent or Newborn

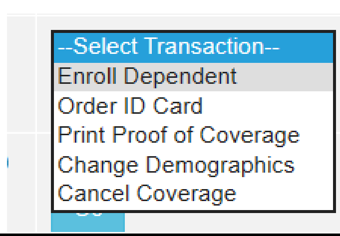
Policy:

Just like enrolling a subscriber, the Employer Resource Center allows you to enroll dependents on current subscribers' policies without having to email or mail the enrollment forms.

* **Note:** You must keep a copy of the paper form with the employee's signature for your records. *

How to Add a Dependent:

Once you have logged into the Employer Resource Center and selected My Accounts, follow the below steps to enroll a dependent for a subscriber.

Step	Action
1.	Select the Quick Search Tab to find the subscriber, can search by name, or USID. **Result:** The Search Results page will display the subscriber information along with a drop-down menu.
2.	Select the Enroll Dependent transaction from the drop-down listing under the subscriber. 

3.	There are six different events to choose from that are listed below: • Open Enrollment • Adoption of Child(ren) • Birth of a Child(ren) • Marriage • Return from Military Duty • Loss of Coverage Enter the dependents Date of Eligibility and click Load Effective Date List. ***Note: If this is a newborn the date will automatically populate.** Once the appropriate date is entered, select the effective date and click continue.
4.	Select Add Dependent on the next page and complete the required fields. Once entered select Continue.
5.	Other coverage – select yes if dependent has other coverage, or no if not applicable.
6.	Type signature and click Submit.

Cancel Coverage

Policy:

The cancellation policy is built into the Employer Resource Center to ensure that cancellations are processed appropriately. If you are requesting a special cancellation date, please contact Enrollment Services at 1-888-320-9798 Monday – Friday 8AM-4:30PM.

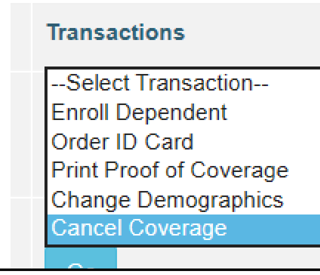
Cancellation of Coverage can be requested for individual dependents, or the entire contract. If the Subscriber/Employee coverage is cancelled, the entire policy will term.

It is the Employer's responsibility to keep a signed copy of the enrollment form on file verifying the Employee's knowledge of the cancellation coverage.

How to Cancel Coverage:

The website guides you through the process to Cancel Coverage for a member or the entire Subscriber policy. Select My Accounts and follow the steps listed below.

Step	Action
1.	Use the Quick Search page to search for the Subscriber or Member for which you want to Cancel Coverage. Select Cancel Coverage and click Go.

	
2.	By selecting the Subscriber, this will cancel the entire policy and all members enrolled. If a specific dependent is only to be termed, then search for that specific member. Use the check boxes to select which dependent(s) are being termed. Select the reason of cancellations followed by the date of termination.
3.	Once the date has been entered click Display Cancellation Dates and choose your term date. *Note: All available dates will be listed to choose for termination. If you wish to cancel for the end of the month, please select the last day of that month. If you were to choose the first of the following month it will term for that exact day, and you will be billed for the one day of coverage. *
4.	Click Approve. The cancellation has been submitted.

Submitting Demographic Changes

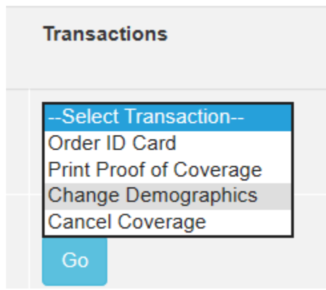
Policy:

Demographic Changes are made effective on the date they are processed by.

Types of Demographic Changes

The following demographic changes are offered via the Employer Resource Center:

- Name Changes
- Address Changes
- Phone Number Updates
- Date of Birth
- Gender Corrections

Step	Action
1.	Select My Accounts and use the Quick Search page to lookup the subscriber or member for whom you want to submit the demographic change for. Result: The Search Results page displays. Select the Change Demographics transaction from the drop down for the appropriate member. ***Note that address changes made to the Subscriber are applicable to all dependents on the contract.** 
2.	Key the new demographic information that is changing for the member on the right side of the form and select the reason for the change. When verified, select Approve to submit the transaction.

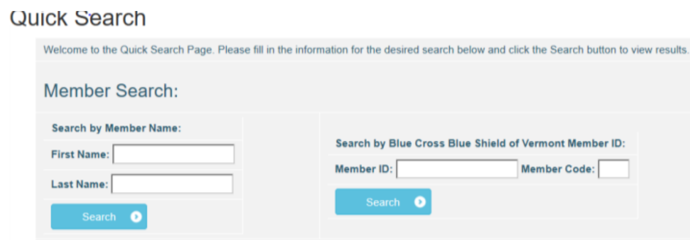
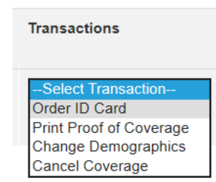
Ordering ID Cards / Printing a Temporary Proof of Coverage

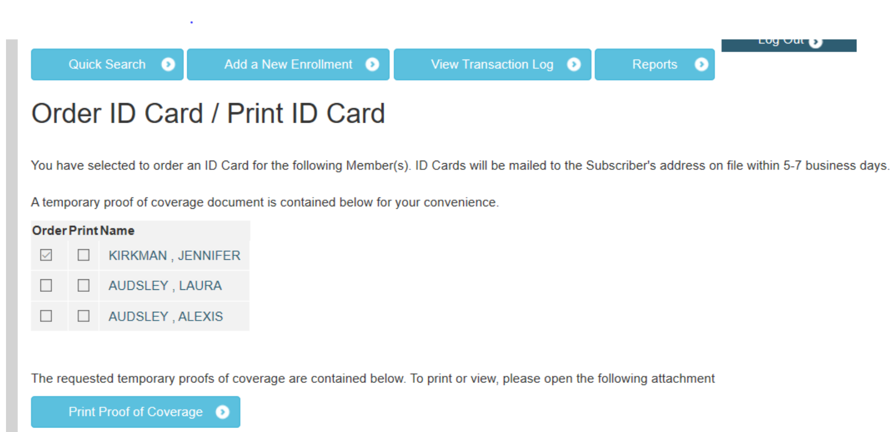
Policy:

ID cards ordered from the Employer Resource Center will be mailed to the subscriber's address on file within 7-10 business days.

How to Order ID Cards:

The website guides you through the process to order ID cards or print a temporary proof of coverage. After clicking on My Accounts follow the steps below.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Under the Quick Search page to search for the Subscriber or Member for whom you want to order an ID Card or print a Temporary Proof of Coverage. You can search by first name, last name, or Member ID and Member Code.

</td></tr>
<tr><td>2.</td><td>To order an ID card Click on the drop-down list of transactions and select Order ID Card, then click Go.

</td></tr>
<tr><td>3.</td><td>The Order ID Card / Print ID Card page will display. This is the screen where you can order the ID cards along with Printing Proof of Coverage. Check the Order Box for each Member who needs an ID Card. Click Order/Print.

To print a Temporary Proof of Coverage, check in the Print column box on each member you wish to print one for. Select Print Proof of Coverage and a new page will appear that can be printed.</td></tr>
<tr><td>4.</td><td>The below screen appears when the ID cards have been ordered.

</td></tr>
<tr><td>5.</td><td>The new ID Card(s) will be mailed to the subscribers address within 7-10 business days.</td></tr>
</table>

Viewing Transactions Performed Online

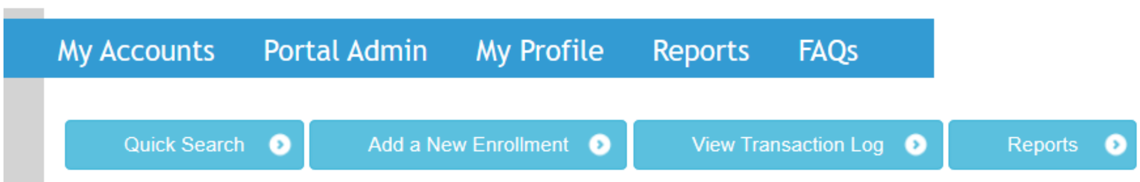
Description:

The Employer Resource Center includes a Transaction Log that provides you with a historical record of all the transactions submitted by the Administrator and any Assistant Users.

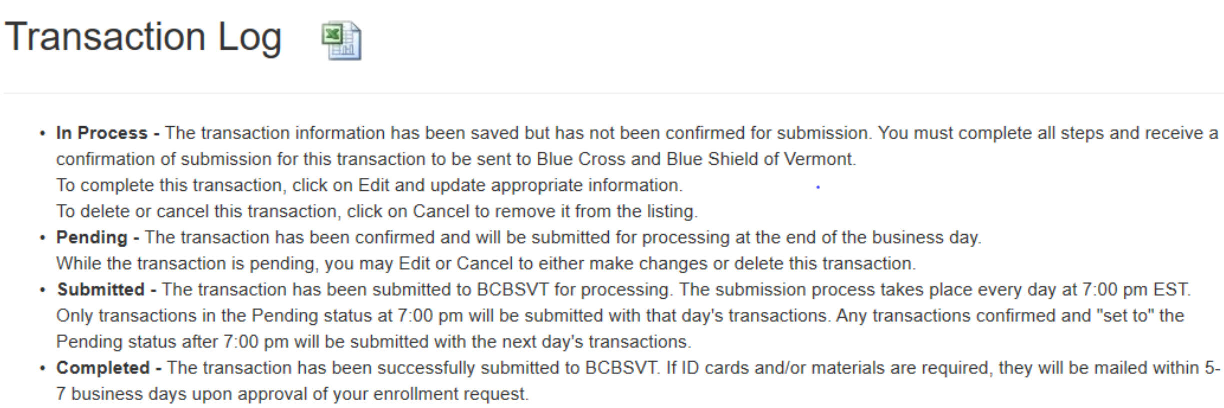
The Transaction Log

The Transaction Log allows you to view a summary and status of the transactions you have performed. Please note: online transactions may take up to 24-48 business hours to be updated on the Employer Resource Center.

When on the My Accounts page, click on the View Transaction Log button.



This brings you to your Transaction Log where you can review all transactions submitted. Below is the legend which defines each status. This is also located at the top of the of the transaction log page for your reference.



Transaction Log

- **In Process -** The transaction information has been saved but has not been confirmed for submission. You must complete all steps and receive a confirmation of submission for this transaction to be sent to Blue Cross and Blue Shield of Vermont.
  To complete this transaction, click on Edit and update appropriate information.
  To delete or cancel this transaction, click on Cancel to remove it from the listing.
- **Pending -** The transaction has been confirmed and will be submitted for processing at the end of the business day.
  While the transaction is pending, you may Edit or Cancel to either make changes or delete this transaction.
- **Submitted -** The transaction has been submitted to BCBSVT for processing. The submission process takes place every day at 7:00 pm EST. Only transactions in the Pending status at 7:00 pm will be submitted with that day's transactions. Any transactions confirmed and "set to" the Pending status after 7:00 pm will be submitted with the next day's transactions.
- **Completed -** The transaction has been successfully submitted to BCBSVT. If ID cards and/or materials are required, they will be mailed within 5-7 business days upon approval of your enrollment request.

Cancelling or Changing a Transaction

Policy:

You may edit a transaction while the transaction status is In Process. You can delete a transaction showing Pending, and Submitted transactions have been received by BCBSVT and cannot be edited.

How to Edit or Cancel a Transaction:

Follow the same steps to locate the transaction log as listed above. Once you find the transaction you recently attempted, you can choose either Edit or Cancel to modify the transaction.

Requirement: When you edit information on a transaction, you will be prompted to continue all the way through the remaining enrollment process in order for the transaction to be accepted.

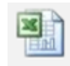
Download a Census

Policy:

Employers can download a census of their group that is formatted to an Excel Spreadsheet. This includes all active subscribers on the group, their demographic information, and what plan choice they are enrolled on.

How to Pull a Group Details:

Step	Action
1.	Click My Accounts.
2.	Under Quick Search, scroll to the bottom and select Search All Groups.
3.	This brings you to Group Details page. Click on the appropriate tab for the desired report. Details Divisions Subscribers Members Billing Membership Counts

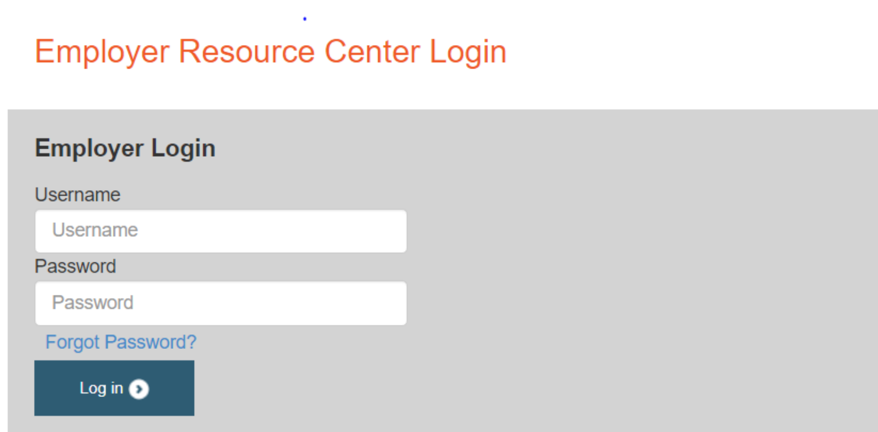
4.	Under the Details tab you will find Download Census. Click for census that provides all subscribers, plans they are enrolled on, and their demographic information.
5.	Under Divisions, Subscribers, Members, Billing, and Membership Counts you will find the Excel icon . Select the Excel icon and that will download a spreadsheet version of the tab you are on. A pop-up will appear asking if you would like to open or save the spreadsheet. Once you have selected your preference, click ok.
6.	An Excel spreadsheet will open automatically with the desired report populated.

Forgot You Password?

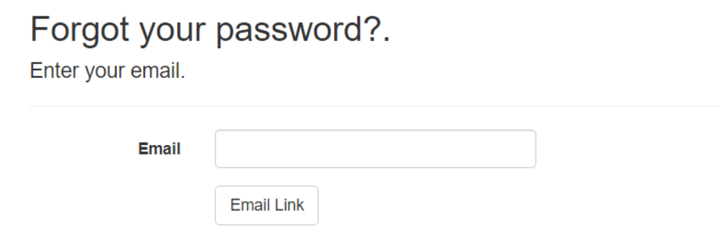
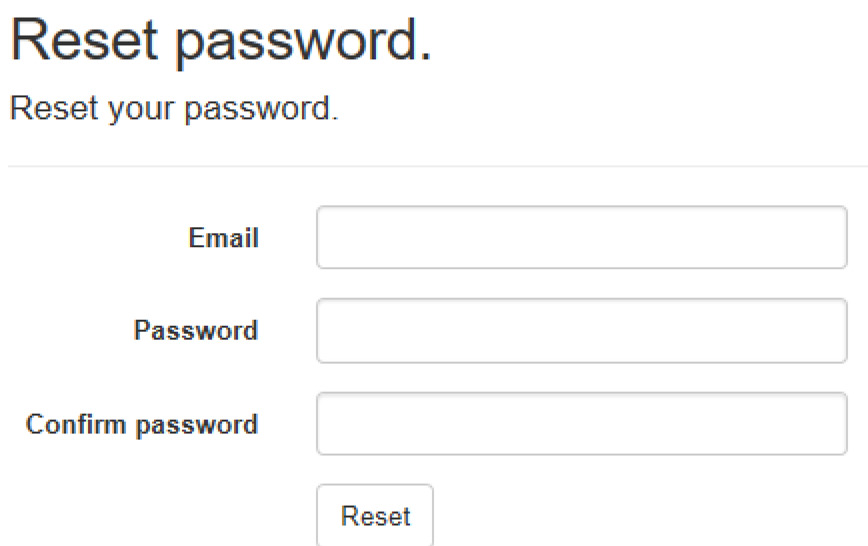
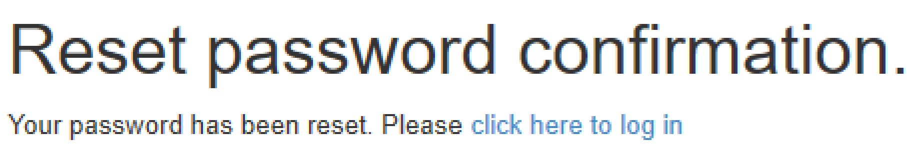
How to Reset My Password:

Follow the steps in the table below to reset you Password.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the log in page, click on Forgot Password? Link underneath the Password field.



</td></tr>
<tr><td>2.</td><td>User enters a valid username associated with their profile and select email link.</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>3.</td><td>An email will be sent to you, follow the step provided in that email and click on the hyperlink that brings you to the screen below.

</td></tr>
<tr><td>4.</td><td>Enter the information requested and click reset. You have successfully updated your password.

</td></tr>
</table>