

EMPLOYER RESOURCE CENTER REFERENCE GUIDE

Enrollment Services

1

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
SECTION 1: USER REGISTRATION

SECTION 1: USER REGISTRATION

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

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

2

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.

What is a local administrator?

3


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

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

SECTION 1: USER REGISTRATION (CONT..)

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

4



BlueCross BlueShield
of Vermont
An Independent Licensee of the Blue Cross and Blue Shield Association.

User Information

If you are an existing user of the Connect system please login. [Click here to start your session.](#)

First Name *

Middle Initial

Last Name *

Title

E-Mail *

Confirm E-Mail *

Office Phone *
Example: (555) 555-5555

Extension #
Example: 123456

Office Fax
Example: (555) 555-5555

User Name *

Password *

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.

Local Admin As the primary registrant, you are automatically a local admin

SECTION 1: USER REGISTRATION (CONT..)

5. Enter your required group information and select “Next.” (Do **NOT** enter hyphens in the tax ID field.)



Office Information

Enter the name and address of your office.

Organization Name *

Tax ID

Group Number *

Group Number 2

Group Number 3

Address *

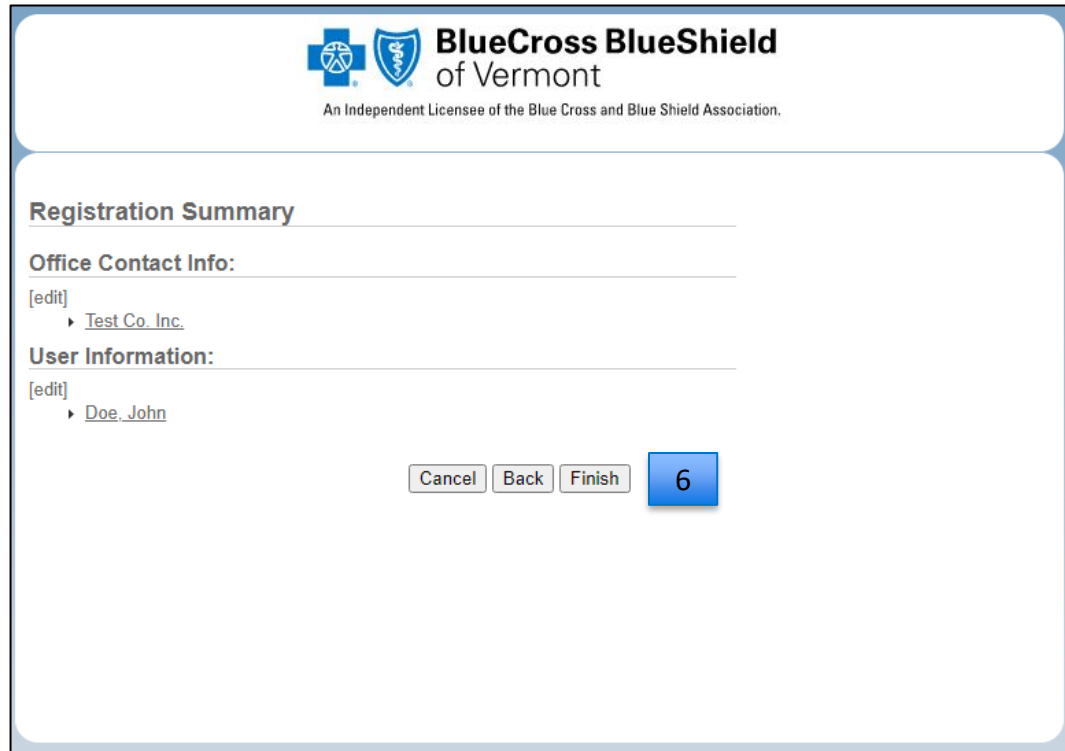
City *

State *

Zip Code *

SECTION 1: USER REGISTRATION (CONT..)

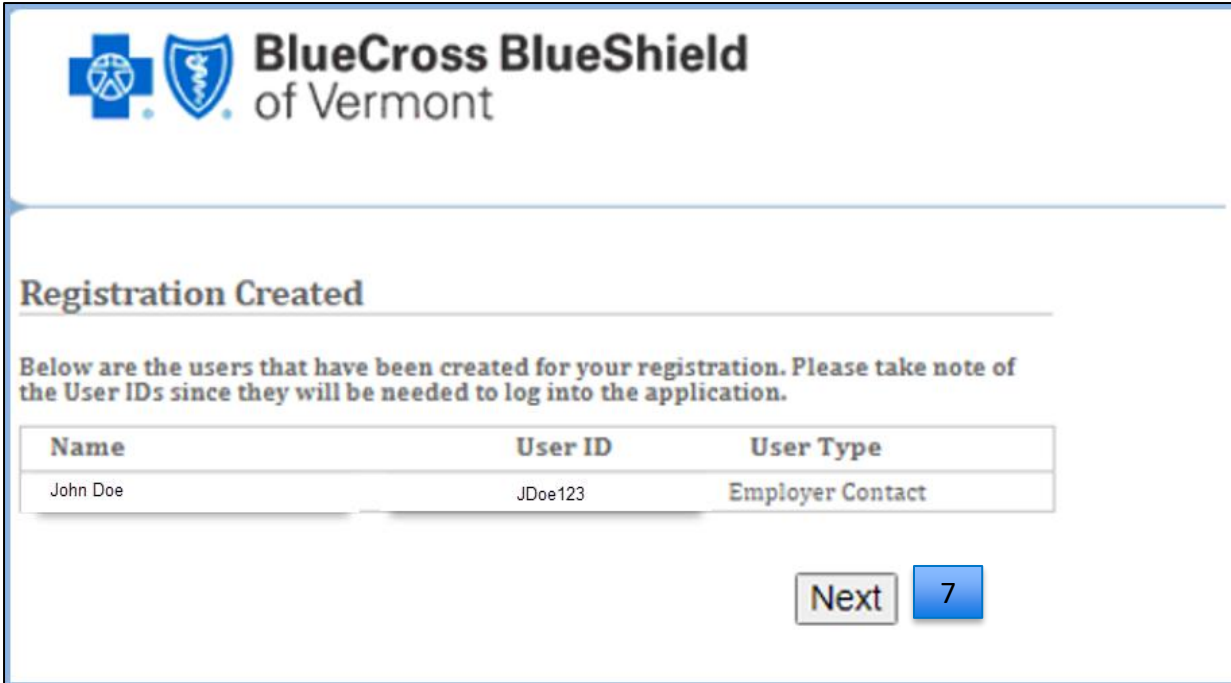
6. Review your registration summary. Verify office contact and user information. Select “Back” if necessary. Once completed, select “Finish.”



The screenshot shows a registration summary page for BlueCross BlueShield of Vermont. At the top, the logo and name are displayed, along with the text "An Independent Licensee of the Blue Cross and Blue Shield Association." Below this, the "Registration Summary" section is divided into two parts: "Office Contact Info:" and "User Information:". Under "Office Contact Info:", there is an "[edit]" link and a dropdown menu showing "Test Co. Inc.". Under "User Information:", there is an "[edit]" link and a dropdown menu showing "Doe, John". At the bottom of the form, there are four buttons: "Cancel", "Back", "Finish", and a blue button with the number "6".

SECTION 1: USER REGISTRATION (CONT..)

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



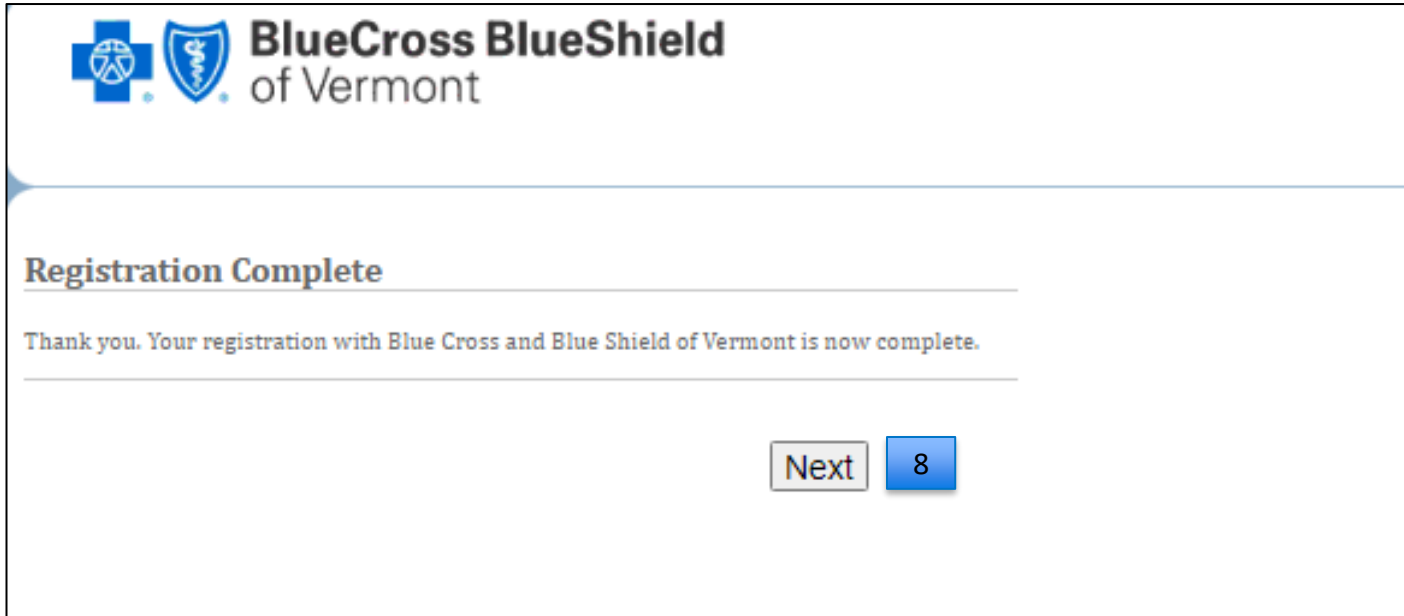
The screenshot shows the BlueCross BlueShield of Vermont logo at the top left. Below the logo, the text "Registration Created" is displayed in a bold, serif font. Underneath this, a message states: "Below are the users that have been created for your registration. Please take note of the User IDs since they will be needed to log into the application." A table with three columns follows: "Name", "User ID", and "User Type". The table contains one row with the data: "John Doe", "JDoe123", and "Employer Contact". At the bottom right of the page, there is a "Next" button and a blue square button containing the number "7".

Name	User ID	User Type
John Doe	JDoe123	Employer Contact

SECTION 1: USER REGISTRATION (CONT..)

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

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

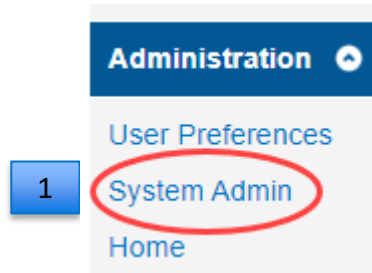


SECTION 2:
SYSTEM ADMIN –
VIEWING USERS

10

SECTION 2: SYSTEM ADMIN – VIEWING USERS

1. Select “System Admin.” **Only the local administrator can view users.**
2. “User Maintenance” will appear, listing all users on your group’s access list.



User Maintenance 2

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Doe, John	Main Office Contact	Test Co. Inc.	241629	JDoe123	10/11/2022	Confirmed	316573

[Add User](#)

SECTION 3:
SYSTEM ADMIN –
ADDING A NEW USER

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SECTION 3: SYSTEM ADMIN – ADDING A NEW USER

1. Select “System Admin” and then Select “Add User.” **Only the local administrator can add users.**

User Maintenance

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Doe, John	Main Office Contact	Test Co. Inc.	241629	JDoe123	10/11/2022	Confirmed	316573

[Add User](#)

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER (CONT..)

2. Enter all required information. You will be asked to create a username and password. Please provide them with the username and password assigned. They will be prompted to create a new password the first time they log in to the ERC.

2

Add User	
▫ First Name	<input type="text" value="Jill"/>
Middle Initial	<input type="text"/>
▫ Last Name	<input type="text" value="Smith"/>
▫ E-mail Address	<input type="text" value="SmithJ@testmail.com"/>
Title	<input type="text" value="Office Admin"/> <small>e.g., Office Manager</small>
▫ Office Phone	<input type="text" value="800-555-9989"/>
Phone Ext	<input type="text"/>
Office Fax	<input type="text"/>
▫ Username	<input type="text" value="smithjill"/>
▫ Password	<input type="password" value="*****"/>

***Important information:** You will need to assign a user role to your new user under User Role Maintenance. (The user will not be added unless a role is selected)*

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER (CONT..)

3. To assign a user role to your new user under User Role Maintenance. Click “Add”

▣ Indicates required field

User Role Maintenance

There are currently no User Roles defined for this user.

3 **Add**

4. Select Employer-Employer User role from the drop-down menu and confirm the Entity List is your group name.
5. Select “Select Role.”

4 **User Role Selection**

Roles **Employer - Employer User** ▾

Entity Lists **Test Co. Inc. -** ▾

5 **Select Role** **Cancel**

SECTION 3: SYSTEM ADMIN – ADDING A NEW USER (CONT..)

7. Confirm all information is entered accurately and Click **“Submit.”**

* *Registration status should reflect Confirmed*

7

User Information

First Name

Middle Initial

Last Name

E-mail Address

Title
e.g., Office Manager

Office Phone

Phone Ext

Office Fax

Username

Password

Local Administrator:

Indicates required field

User Role Maintenance

Blue Cross And Blue Shield Of Vermont

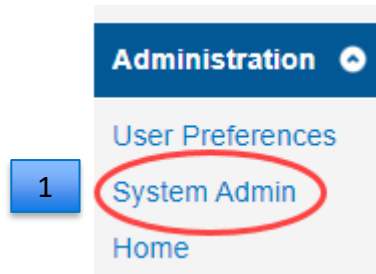
Blue Cross and Blue Shield of Vermont - Employer Portal

Role	Entity List Name	Entity List ID	Registration Status
<input type="checkbox"/> Employer User	Test Co. Inc.	315594	Pending

SECTION 4:
SYSTEM ADMIN –
EDITING USER INFORMATION

SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION

1. Select “System Admin.” **Only the local administrator can view users.**
2. “User Maintenance” will appear, listing all users on your group’s access list. Click on the user’s name.



A screenshot of the "User Maintenance" page. The page title is "User Maintenance". Below the title is a table with the following columns: "User Name", "Office Security", "Company Name", "Company ID Number", "User ID", "Last Login", "User Status", and "User Index". The table contains one row of data for "Doe, John". Below the table is a blue button labeled "Add User". A blue square with the number "2" is positioned to the left of the first row of the table.

User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Doe, John	Main Office Contact	Test Co. Inc.	241629	JDoe123	10/11/2022	Confirmed	316573

SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION (CONT..)

3. Make the appropriate changes, then click “Submit.”

The screenshot shows a 'User Information' form with the following fields and values:

- First Name: John
- Middle Initial: (empty)
- Last Name: Doe
- Time Zone: America/New York (dropdown menu)
- E-mail Address: JDoe123@testmail.com
- Title: (empty) with a hint 'e.g., Office Manager'
- Office Phone: (555) 555-5555
- Phone Ext: (empty)
- Office Fax: (empty)

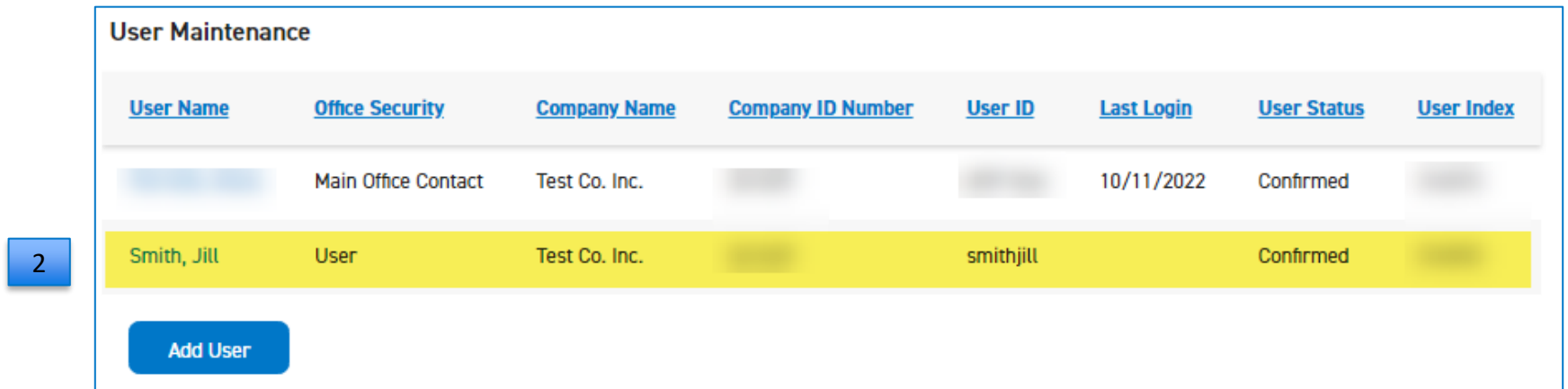
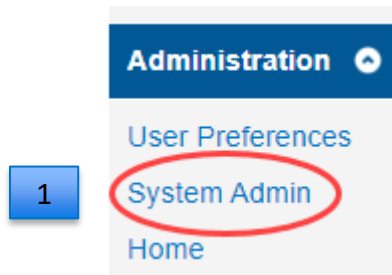
A blue callout box with the number '3' is positioned to the left of the form. A blue arrow points from this box to a blue 'Submit' button located at the bottom right of the form.

SECTION 5: SYSTEM ADMIN – REMOVING USERS

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SECTION 5: SYSTEM ADMIN – REMOVING USERS

1. Select “System Admin.” **Only the local administrator can remove users.**
2. “User Maintenance” will appear, listing all users on your group’s access list. Click on the name of the user you want to remove.



SECTION 5: SYSTEM ADMIN – REMOVING A USER (CONT..)

3. Within “User Role Maintenance”. Check the box next to the user’s role and click “Remove”.

3

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 User	Test Co. Inc.		Confirmed

[Add](#) [Remove](#)

SECTION 5: SYSTEM ADMIN – REMOVING USERS

4. Indicate reason for removing user, e.g., “No longer employed by group”, and then select “Yes.”
5. A confirmation screen will appear.

4

 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

Yes **No**

5

 **User Registration Successfully Removed**

The user registration has been successfully removed.

SECTION 6: NAVIGATING THE HOMEPAGE

SECTION 6: HOMEPAGE

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

BlueCross BlueShield of Vermont
An Independent Licensee of the Blue Cross and Blue Shield Association.

Welcome
Role: ERCOffice Manager Verification

Home Search Employees Document Manager Eligibility Tools & Resources

Log Out

1

2

My Employees

Current Employee
(None)

Search Employees

My Human Resources

Current Group
(None)

Initial Enrollment

My Health Plans

Eligibility
Provider Directory
Reports
Document Manager
Tools & Resources
Invoices

Administration

User Preferences
System Admin
Home

Hello, Welcome to your Employer Resource Center.

Welcome to the Employer Resource Center!
Please utilize our [ERC Reference Guide](#) for instructions on how to manage your group's information, access membership eligibility and process enrollment transactions.

Search Employees →
Search for and view employee plan information.

Reports →
Employee member roster and enrollment transaction reports.

Provider Directory →
Search our wide network of providers.

Payments & Invoicing →
Looking for a PDF copy of your invoice? We've moved it to our payment site so all your invoicing and payment information is in one, convenient location.

Member Maintenance →
Resources for group enrollment, including FAQs.

SECTION 6: HOMEPAGE OPTIONS

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

The screenshot shows a grid of five interactive cards. Each card has a blue square with a white number in the top right corner and a blue arrow pointing right. The cards are arranged in two rows: three in the top row and two in the bottom row. The background of the bottom row is a light gray color.

- 1 Search Employees →**
Search for and view employee/member plan information.
- 2 Reports →**
Employee member roster and enrollment transaction reports.
- 3 Provider Directory →**
Search our wide network of providers
- 4 Payments & Invoicing →**
Invoices are now available for downloading in CSV or PDF format using the "Invoices" selection in the left-hand navigational panel. To pay and view your invoice, continue doing so in our payment portal.
- 5 Member Maintenance →**
Resources for group enrollment, including FAQs.

SECTION 6: LEFT-HAND NAVIGATION

The screenshot shows a vertical navigation menu with four main sections, each highlighted with a blue box and a number:

- 1** **My Employees** (dropdown arrow):
 - Current Employee
 - (None) (dropdown arrow)
 - Search Employees
- 2** **My Human Resources** (dropdown arrow):
 - Current Group
 - (None) (dropdown arrow)
 - Search Employer Groups
 - Initial Enrollment
- 3** **My Health Plans** (dropdown arrow):
 - Eligibility
 - Provider Directory
 - Reports
 - Document Manager
 - Tools & Resources
 - Invoices
- 4** **Administration** (dropdown arrow):
 - User Preferences
 - System Admin
 - Home

1. My Employees- Search for employees by last name or member ID to initiate any changes, and/or review benefit and eligibility.

2. My Human Resources – search between your group/divisions to elect benefit plan in order to initiate initial enrollments for new subscribers.

3. My Health Plans – review member eligibility, invoices as well as reports and tools to help manage your group plan.

4. Administration –review/edit your user profile and managing additional users.

SECTION 7: MY EMPLOYEES

SECTION 7: MY EMPLOYEES

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

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

1

My Employees Employee Search

Current Employee
(None)

Search Employees

My Human Resources

Current Group
(None)

Search Employer Groups

Initial Enrollment

Conduct Employee Search

Employee Last Name Member ID

(ID Example - HP555555,HP444444)

Search Filters

As of 3/31/2023

Search Clear

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

My Employees

Current Employee
Doe, John

Search Employees

Employee Information

Change Enrollment

Terminate Enrollment

Benefits and Eligibility

ID Card

John Doe
Member ID ZIL V87654321012301

Member Information

Date of Birth	Sex	Address
31 Jan 1977	Male	123 Test Lane, Tester, VT 01234
Phone	Email	
(802) 555-5555		

Benefits & Eligibility

Status	ACTIVE
Line of Business	Exclusive Provider Organization
Product	Test Co. EPO CDHP 1

SECTION 7: MY EMPLOYEES

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

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

SECTION 7: MY EMPLOYEES-CHANGE ENROLLMENT

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

(Required fields are marked with the “*” symbol.)

The screenshot shows a web form titled "Change Enrollment". It contains several sections:

- Effective Date:** A date input field containing "11/1/2022" with a calendar icon to its right.
- Event Date:** An empty date input field with a calendar icon to its right.
- Benefit Information:** A section header.
- Plan Coverage:** A dropdown menu showing "EPO CDHP 1 - VBNEDEC02".
- Enrollment File Information:** A section header.
- Benefit Status:** A dropdown menu showing "Active".
- Employment Status:** A dropdown menu showing "Full-time/Full time active employee".
- Reason for Change:** A dropdown menu showing "-Select-", which is highlighted with a red rectangular border.

The following are valid Reason's for Change:

- **Birth** – add a newborn. **effective date should be the 1st day following the 60-day grace period. You can verify this date by searching for the newborn under Eligibility.*
- **Change in Identifying Data Elements** – change in name, gender, DOB, e-mail, contact phone number.
- **value is required in the top/1st 'Contact Number' field.*
- **Change of Location** – change in address
- **Initial Enrollment** – add a new dependent
- **Marriage** – add a spouse
- **PCP Change** – change PCP
- **COBRA** – Use to move employee coverage from Active to COBRA status. **If employee is still active, select change enrollment and indicate COBRA in Reason for Change. If employee is termed refer to page 36.*

SECTION 7: MY EMPLOYEES-TERMINATE ENROLLMENT

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

1. You must select a reason for the change
2. Click “Submit”

(Required fields are marked with the “” symbol.)

Terminate Enrollment


Subscriber Summary


Name: Doe, John


Employer Group: D001 [REDACTED] CORPORATE - [REDACTED]


Plan Coverage: [REDACTED] EPO CDHP 1 - VBNEDEC02

Enrollment File Information



Coverage Term Date: 10/31/2022 

Benefit Status: Active 

Employment Status: Full-time/Full time active employee 

Reason for Change: -SELECT- 

Terminate Enrollment Coverage Options

Name	Relationship	Birth Date	Death Date
<input type="checkbox"/> Doe, John	Self	5 Oct 1967	<input type="text"/> 
<input type="checkbox"/> Doe, Jane	Spouse	31 Oct 1966	<input type="text"/> 

The following are valid Reason's for Change:


- Death
- Divorce
- Termination of employment
- Voluntary withdrawal


1

2

SECTION 7: MY EMPLOYEES-BENEFITS AND ELIGIBILITY


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

Benefits and Eligibility as of 12 Oct 2022 Download PDF 

 **John Doe** **Address** **PCP**

DOB [Redacted]
Gender [Redacted]
Member ID [Redacted]
Phone [Redacted]

[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	Exclusive Provider Organization	Start Date	1 Dec 2021
Group	D001 [Redacted] CORPORATE ([Redacted])	End Date	
Division	[Redacted] D001	Enrollment Origination Date	1 Dec 2021
Benefit Plan	VBNEC02 - [Redacted] EPO CDHP 1	Group Benefit Effective	1 Jan 2011

Dependents

Name	Birth Date	Gender	Member ID	Relationship	PCP
Jane Doe	31 Oct 1966	[Redacted]	V [Redacted]	Spouse	

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

SECTION 7: MY EMPLOYEES-ID CARD

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

1. Under **“Request an ID Card”** check the member you would like to order an ID Card or print proof of coverage for.

2. Click **“Submit”** for ID Cards and **“Print”** for Proof of Coverage

*An ID card will be ordered and mailed to member in approximately 7-10 business days.

Order an ID Card

Check the box next to the family members(s) you would like to order an ID card for, then click **“Submit.”** You should receive your ID card(s) within 7-10 business days.

Print Proof of Coverage

Click **“Print”** in the upper right-hand corner of the table. Then, click the **“Print”** button next to the family member(s) you wish to print a proof of coverage for.

	Name	Member ID
<input checked="" type="checkbox"/>	Doe, John	V8 01

Request an ID Card

1 Doe, John V8 01

2

2

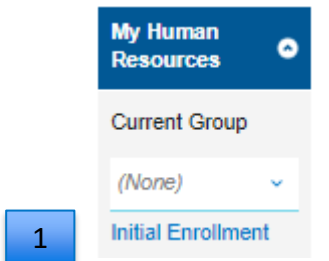
SECTION 8

MY HUMAN RESOURCES

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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

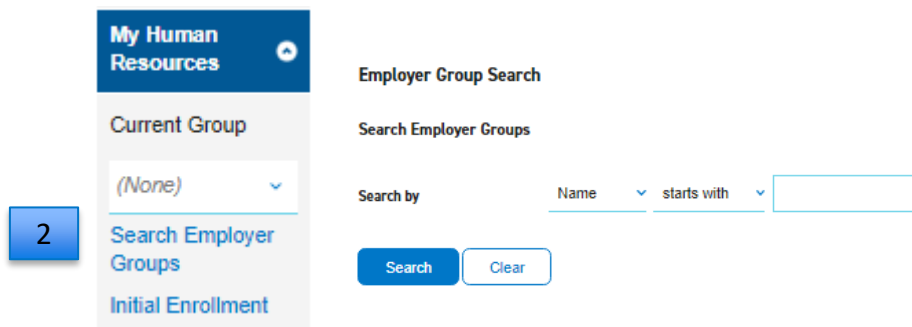
1. Under "My Human Resources," use the 'Current Group' drop down. This will have a list of all your eligible Group/Division that you've recently interacted with. To search for a Group not showing on the drop down, proceed to step 2.



The screenshot shows a blue header with "My Human Resources" and a circular arrow icon. Below it is a "Current Group" dropdown menu with "(None)" selected. At the bottom of the menu are two links: "Initial Enrollment" and "Search Employer Groups". A blue box with the number "1" is positioned to the left of the dropdown.

***If you have a separate COBRA group or your group offers COBRA Benefit Plans, and your employee is currently terminated; you will want to select the COBRA specific group/plan when electing COBRA as your reason for change.**

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



The screenshot shows the same "My Human Resources" header. The "Search Employer Groups" link is highlighted. To the right is the "Employer Group Search" form, which includes a "Search Employer Groups" label, a "Search by" dropdown menu with "Name" selected, a "starts with" dropdown menu, and an empty text input field. Below the input field are "Search" and "Clear" buttons. A blue box with the number "2" is positioned to the left of the "Search Employer Groups" link.

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

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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

The screenshot shows a web interface with a left-hand navigation bar and a main content area. The navigation bar has two main sections: 'My Employees' and 'My Human Resources'. Under 'My Employees', there is a 'Current Employee' dropdown menu currently set to '(None)', a 'Search Employees' link, and an 'Initial Enrollment' link. Under 'My Human Resources', there is a 'Current Group' dropdown menu currently set to 'A123 Corp Inc.', a 'Search Employer Groups' link, and the 'Initial Enrollment' link. The 'Initial Enrollment' link is highlighted with a blue box containing the number '3'. The main content area is titled 'Information' and contains an information icon followed by the text 'Employer Group Selected'. Below this, it states 'Your current employer group is now: A123 Corp Inc.'

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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

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

Benefit Plans

EPO (PCP)	ABCD1234	SELECT PLAN
-----------	----------	-----------------------------

4

Initial Enrollment– this option allows you to enroll new employees, as well as re-enroll terminated employees on COBRA continuation of coverage.

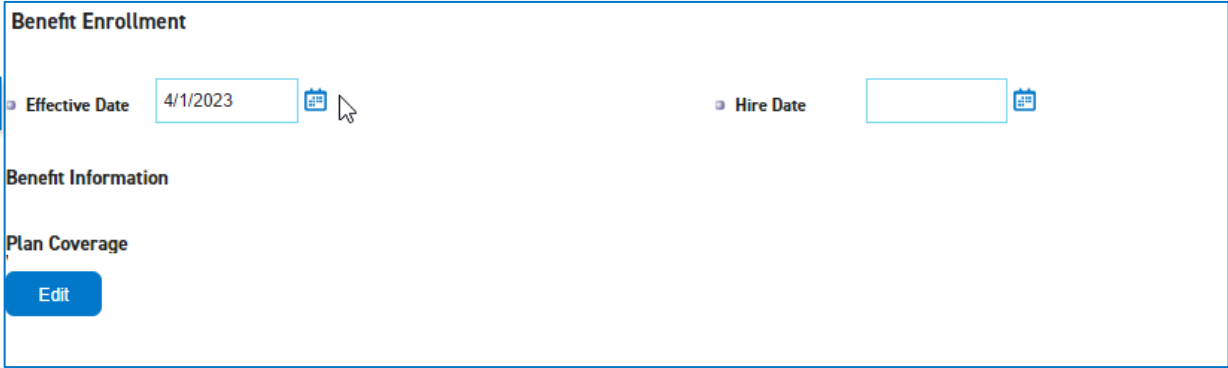
(Required fields are marked with the “^{*}” symbol.)

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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

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

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



The screenshot shows a web form titled "Benefit Enrollment". On the left side, there is a blue square containing the number "5". The form has two main sections: "Benefit Enrollment" and "Benefit Information". Under "Benefit Enrollment", there are two fields: "Effective Date" with the value "4/1/2023" and a calendar icon, and "Hire Date" with an empty text box and a calendar icon. Below these fields is the "Benefit Information" section, which includes "Plan Coverage" and an "Edit" button.

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

6. The following are valid Reason's for Change:

- **Initial Enrollment** – add a new employee to your group plan along with their dependents.
- **COBRA** – Use to move employee coverage from Active to COBRA status. **If employee is still active, select change enrollment and indicate COBRA in Reason for Change.*

6

Enrollment File Information

Benefit Status Active ▾

Employment Status Full-time/Full time active employee ▾

Reason for Change ▾

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

7. You will be required to provide the following fields:

- Subscriber Demographic information-First Name, Last Name, SSN, Martial Status, Gender and Birth Date.
- Subscriber Contact Information- Contact Numbers, Mailing Address, and Mailing City, State and Zip.

(Required fields are marked with the “” symbol.)

7

Subscriber Demographic Information

First Name

Middle Name

Last Name

Suffix

SSN

Marital Status

Gender

Birth Date

Subscriber Contact Information

Contact Numbers

Mailing Address

Mailing Apt/Suite

Mailing City

Mailing State, Zip

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

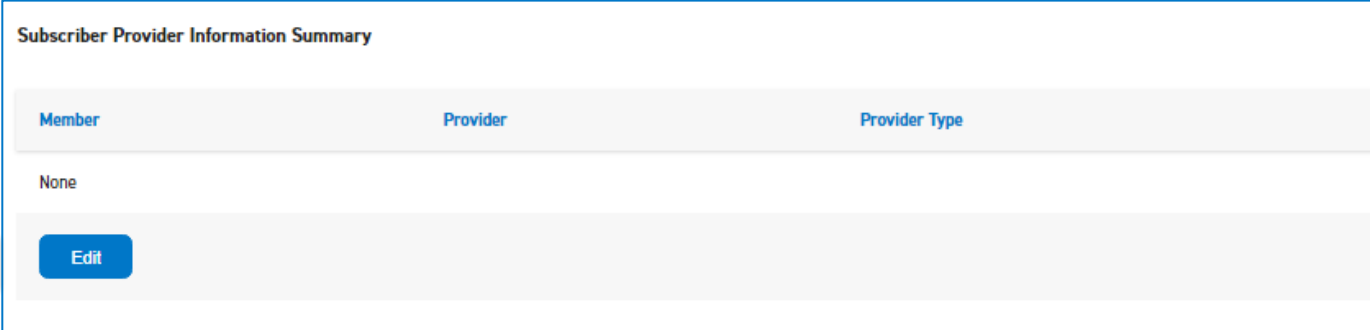
Are you apart of a managed care plan?

Managed Care Plans Must Select a Primary Care Provider

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

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

8. If applicable, Select “edit” within the Subscriber Provider Information Summary to add a provider selection.



The screenshot shows a web interface titled "Subscriber Provider Information Summary". It features a table with three columns: "Member", "Provider", and "Provider Type". The table is currently empty, with the word "None" displayed in the first column. Below the table, there is a blue "Edit" button. A blue box with the number "8" is positioned to the left of the "Edit" button, indicating the step number.

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

9. To select a provider add a value for the search criteria using, name, NPI or zip. Click “Search”

10. Once you have selected the provider. Click “add”

Add Provider Selection

Member: Doe, Jane

Select Provider: Name NPI Zip

Search: 123456789 Search 9

Add Cancel

11. Once your ‘Current Provider List’ is populated. Click “Finish”.

* To remove your selection and elect a new PCP. Click “Remove”

Current Provider List

Remove	Member	Provider	Provider Type
Remove	Doe, Jane	IRVING S SMITH, DO	Primary Care Provider

Finish

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

12. If applicable, complete Dependent Information Summary to add dependents to the policy by clicking on “Edit”

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

Dependent Information Summary

Name	Relationship	Birth Date
None		

12 [Edit](#)

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

13. You will be required to provide the following fields:

- Subscriber Demographic information-First Name, Last Name, SSN, Martial Status, Gender and Birth Date.
- Subscriber Contact Information- Contact Numbers, Mailing Address, and Mailing City, State and Zip.

(Required fields are marked with the “ * ” symbol.)

Add Or Modify Dependents 13

Dependent Demographic Information

<input type="checkbox"/> First Name	<input type="text"/>	<input type="checkbox"/> Gender	
<input type="checkbox"/> Middle Name	<input type="text"/>	<input type="checkbox"/> Birth Date	
<input type="checkbox"/> Last Name	<input type="text"/>		
<input type="checkbox"/> Suffix	<input type="text"/>		
<input type="checkbox"/> SSN	<input type="text"/>		
<input type="checkbox"/> Relationship	<input type="text" value="-Select-"/>		

Dependent Contact Information

Contact Numbers	<input type="text" value="-Select-"/>	<input type="text"/>
	<input type="text" value="-Select-"/>	<input type="text"/>
	<input type="text" value="-Select-"/>	<input type="text"/>
<input type="checkbox"/> Mailing Address	<input type="text"/>	
<input type="checkbox"/> Mailing Apt/Suite	<input type="text"/>	
<input type="checkbox"/> Mailing City	<input type="text"/>	
<input type="checkbox"/> Mailing State, Zip	<input type="text" value="AA"/>	<input type="text"/>

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

Are you apart of a managed care plan? If not, skip to step 15.

14. Select “edit” within the Subscriber Provider Information Summary to add a provider selection.

15. Select “Add or Modify Dependents” to add your dependent to the Current Dependent Roster

Dependent Provider Information Summary

Member	Provider	Provider Type
None		

14 Edit

15 Add Or Modify Dependents Cancel

■ Indicates required field

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

16. Click “Return to Enrollment”

17. Once everything is complete, on “Submit”

Current Dependent Roster

Name	Relationship	Birth Date	Edit	Remove
None				

16 [Return to Enrollment](#)

17 [Submit](#) [Cancel](#)

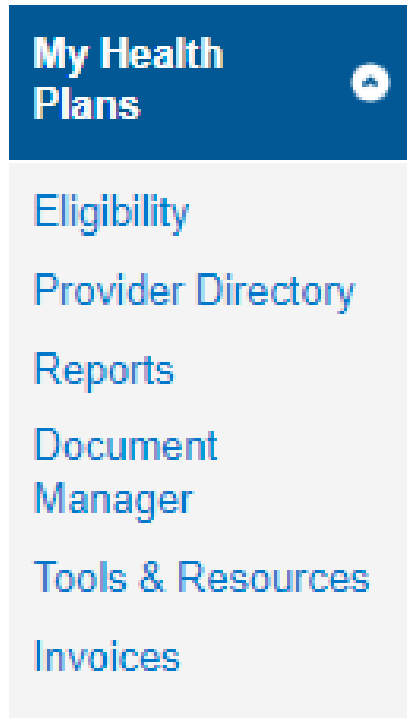
Indicates required field

SECTION 9: MY HEALTH PLANS

48

SECTION 9: MY HEALTH PLANS

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



- **Eligibility** – search for all members, employees and their dependents
- **Provider Directory** – find a network provider
- **Reports** – run a membership roster, transaction reporting & employer group summary.
- **Document Manager** – store your historical reports
- **Tools and Resources** – provides quick and easy access to frequently used links and information.
- **Invoices** – view both a PDF and CSV version of your premium bill invoice.

SECTION 9: MY HEALTH PLANS – ELIGIBILITY

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

1 My Health Plans

- Eligibility
- Provider Directory
- Reports
- Document Manager
- Tools & Resources
- Invoices

2 Eligibility Search

Conduct Eligibility Search

Member Last Name Member ID

(ID Example - HP5555555,HP4444444)

Search Filters

As of

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

SECTION 9: MY HEALTH PLANS – PROVIDER DIRECTORY

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

The screenshot displays the 'Provider Search' interface. On the left, a vertical navigation menu is shown with a blue box containing the number '1' next to the 'Provider Directory' link. The menu items are: My Health Plans, Eligibility, Provider Directory, Reports, Document Manager, Tools & Resources, and Invoices. The main search area is titled 'Provider Search' and has a blue box with the number '2' next to it. It contains several search fields: 'Provider' (with radio buttons for Name, ID, UPIN, NPI and a text input field), 'Practice' (with radio buttons for Name, ID, NPI and a text input field), 'Type' (a dropdown menu set to 'Any Type'), 'Role / Specialty' (a checkbox for 'PCP and/or' and a dropdown menu set to 'Any Specialty' with 'ACUPUNCTURIST' selected), 'Search By Distance' (a link with a question mark icon), 'Distance' (a dropdown menu set to 'No Preference' and a note 'Street address or zip code required for distance search.'), 'From' (a dropdown menu set to '-Select-'), and 'Zip' (a text input field). There are also 'Search' and 'Clear' buttons at the bottom. An 'Advanced Search Options' link is also visible.

SECTION 9: MY HEALTH PLANS – REPORTS

1. Selecting “Reports” under My Health Plans will give you access to your Employer Member Roster, Employer Group Summary Report and your Enrollment Transaction Report.

1

My Health Plans

- Eligibility
- Provider Directory
- Reports**
- Document Manager
- Tools & Resources
- Invoices

Report List Legacy Reports

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.

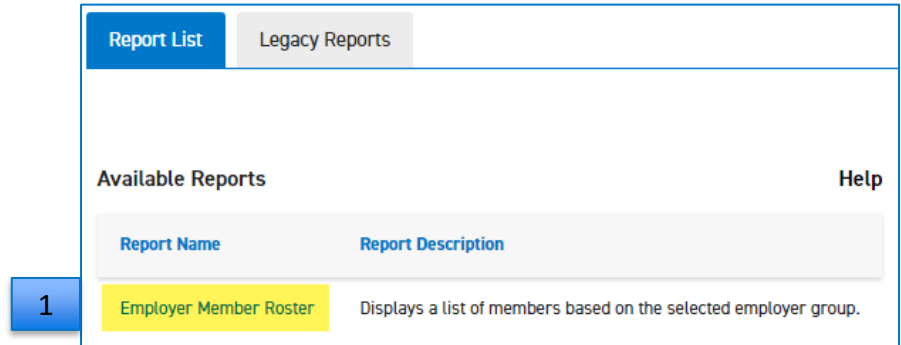
Report List **Legacy Reports**

Available Reports Help

Report Name	Report Description
Enrollment Transaction Report	get a list of enrollment transactions

SECTION 9: MY HEALTH PLANS - REPORTS – EMPLOYER MEMBER ROSTER

1. Click on “Employer Member Roster.”



The screenshot shows a web interface with two tabs: 'Report List' (active) and 'Legacy Reports'. Below the tabs is a section titled 'Available Reports' with a 'Help' link on the right. A table with two columns, 'Report Name' and 'Report Description', is displayed. The first row is highlighted in yellow and contains the text 'Employer Member Roster' and 'Displays a list of members based on the selected employer group.' A blue box with the number '1' is positioned to the left of the table row.

Report Name	Report Description
Employer Member Roster	Displays a list of members based on the selected employer group.

SECTION 9: MY HEALTH PLANS - REPORTS – EMPLOYER MEMBER ROSTER (CONT.)

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

The screenshot shows the 'Employer Member Roster' form. It is divided into three sections:



- Member Selection:** A dropdown menu is set to 'Active Members', followed by 'As of' and a date field containing '04/06/2023'. A callout '2' points to the 'Active Members' dropdown.
- Employer Group Selection:** A text box with the label 'Employer Group ID' and the instruction 'Select Employer Group'. A callout '3' points to this section.
- Subscriber Section:** A checkbox labeled 'Subscribers Only' is unchecked. A callout '4' points to the 'Continue' button at the bottom right of the form.

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

SECTION 9: MY HEALTH PLANS - REPORTS – EMPLOYER MEMBER ROSTER (CONT.)

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

Report - Employer Member Roster

5   [Back](#)

Member Roster by Employer

Employer Group Name:

Count of 2
Active Members

As of: April 06, 2023

SECTION 9: MY HEALTH PLANS – REPORTS - EMPLOYER GROUP SUMMARY

Report List Legacy Reports

1. Click on 'Employer Group Summary Report'

Available Reports Help

Report Name	Report Description
1 Employer Group Summary Report	Displays a summary of a group or groups and their currently available benefit plan options.

- 2. You can select all divisions under your Group ID or select a specific division.
- 3. Once parameters are filled in, click continue

2

Employer Group Summary Report

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

3

Important Note: Narrow your search results by entering a division number in the Group ID field; this will display only the specific division you need. Alternatively, to run the report by group name, enter the first four letters of the group name in the Name field.

SECTION 9: MY HEALTH PLANS – REPORTS - EMPLOYER GROUP SUMMARY (CONT.)

4. The Employer Group Summary Report is available to be downloaded in either PDF or CSV format.

Report - Employer Group Summary Report

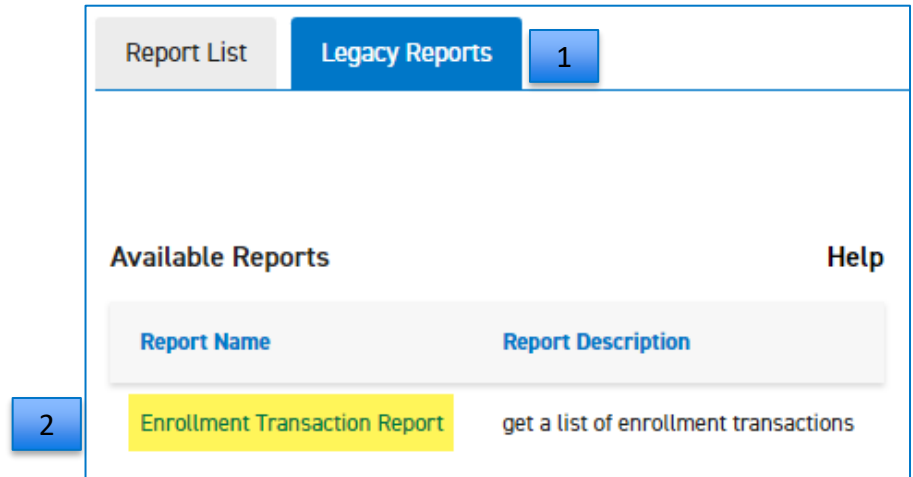
4   [Back](#)

Employer Group Summary

Employer Group ID	Employer Group Name	Benefit Plan Name	Benefit Plan ID	Effective Date	Expiration Date
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SECTION 9 MY HEALTH PLAN - REPORTS – ENROLLMENT TRANSACTION REPORT

1. Click on “Legacy Reports”
2. Click on “Enrollment Transaction Report”



The screenshot shows a web interface with a navigation bar at the top. The 'Legacy Reports' tab is selected and highlighted in blue, with a blue box containing the number '1' next to it. Below the navigation bar, the page is titled 'Available Reports' on the left and 'Help' on the right. A table with two columns, 'Report Name' and 'Report Description', is displayed. The first row of the table is highlighted in yellow, with a blue box containing the number '2' to its left. The 'Report Name' is 'Enrollment Transaction Report' and the 'Report Description' is 'get a list of enrollment transactions'.

Report Name	Report Description
Enrollment Transaction Report	get a list of enrollment transactions

SECTION 9: MY HEALTH PLANS - REPORTS - ENROLLMENT TRANSACTION REPORT (CONT.)

3. Use the “Selection Criteria” to set your own filters. Set your search filters under “**Search Criteria**”, “**Column Selection**” and “**Report Criteria**”

4. Set date filters by confirmation date or effective date within Search Criteria

5. Select the columns you want to display within Column Selections

6. Indicate if you want the report as a .pdf or a .csv (Excel) within Report Results

7. Click Submit

Enrollment Transaction Report
?

Employer Group

All Employer Groups — or —

Employer Group Name

Employer Group ID

Confirmation Start Date

Confirmation End Date

Transaction Type

Initial Enrollment

Open Enrollment

Change Enrollment

Terminate Enrollment

Selection Criteria

Employee

Last Name

ID Number

Social Security Number

Effective Start Date

Effective End Date

Plan Coverage All Coverages

Column Selection

Available Columns

- Member Name
- Street Address
- City
- State
- Zip Code
- Home Phone
- Birth Date
- Sex

Selected Columns

Report Results

Display Results ▼

Order By Choose to sort ▼

Group by Choose to group ▼

Report Criteria

Header Include Selection Criteria

Include Date

Footer Include Selection Criteria

Include Date

Lines Per Page

SECTION 9: MY HEALTH PLANS - DOCUMENT MANAGER

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

My Health Plans

- Eligibility
- Provider Directory
- Reports
- Document Manager**
- Tools & Resources
- Invoices



Current Documents

Document Search:

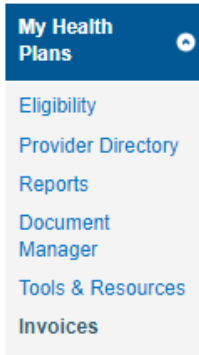
Search term:

Search **Clear**

Sorted By: **Newest** **Per Page** 25

Document Name	Owned By	
Payor Administrative Report_20220825-1238 17.csv	[Redacted]	
Payor Admin Report of Confirmed Users created from 01-01-2013 to 05-31-2016.csv	Blue Cross And Blue Shield Of Vermont	

SECTION 9: MY HEALTH PLANS – INVOICES



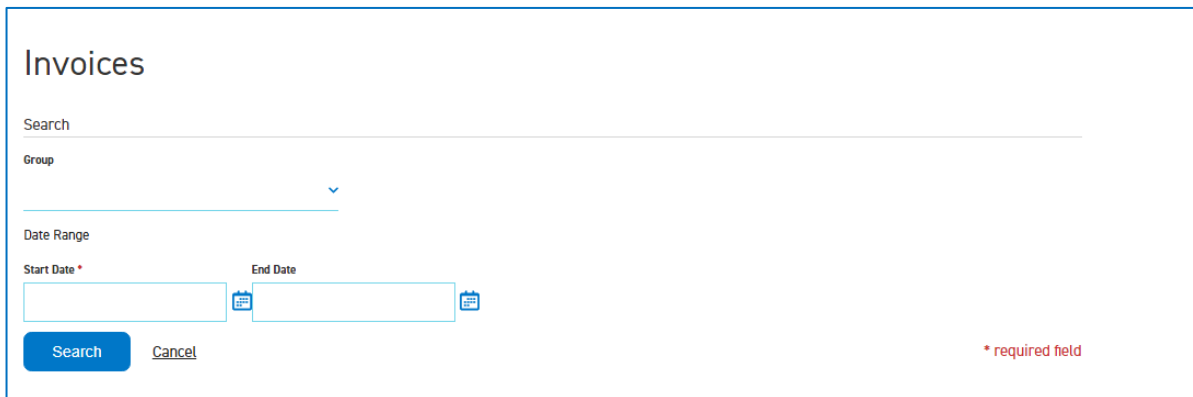
My Health Plans

- Eligibility
- Provider Directory
- Reports
- Document Manager
- Tools & Resources
- Invoices**

1

1. Click 'Invoices' to review your group(s) monthly invoices. Invoices are available in CSV and PDF file formats.
2. Select the group in the 'Group' drop down and choose the 'Select Date' of the invoice you would like to review and click 'Search'.

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



Invoices

Search

Group

Date Range

Start Date * End Date

Search Cancel

* required field

2

SECTION 9: MY HEALTH PLANS – INVOICES

A browser from <https://bcbs-vt.hylandcloud.com/appnet/docpop/docpop.aspx> will open with a list of invoices billed to the selected group. Invoices are indexed by both CSV and PDF formats.

**Filter options are available to limit search results

PDF - Begin with Invoice Date

CSV - Begin with FIN - Group Invoice

1

OnBase

Custom Query Results

Document Name ↑

▽ Contains...

Invoice Date	Inv # 123456789	Bill To Acct # 12345678900
FIN - Group Invoice Detail	CSV Invoice Date-Group ID #-Division ID#	

PDF

CSV

1. A Custom Query Result page will display your invoices in both PDF and CSV formats.

PDF- Monthly Invoice to download as a PDF. This version is a copy of the mailed invoice you receive each month.

CSV- A **Group Invoice Detail** provides a list of each member per Division ID.

SECTION 10:

NEED SUPPORT OR HAVE
QUESTIONS?

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SECTION 10: NEED SUPPORT OR HAVE QUESTIONS?

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