EMPLOYER RESOURCE CENTER REFERENCE GUIDE

Enrollment Services

BlueCross BlueShield of Vermont

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

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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”

2

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.

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

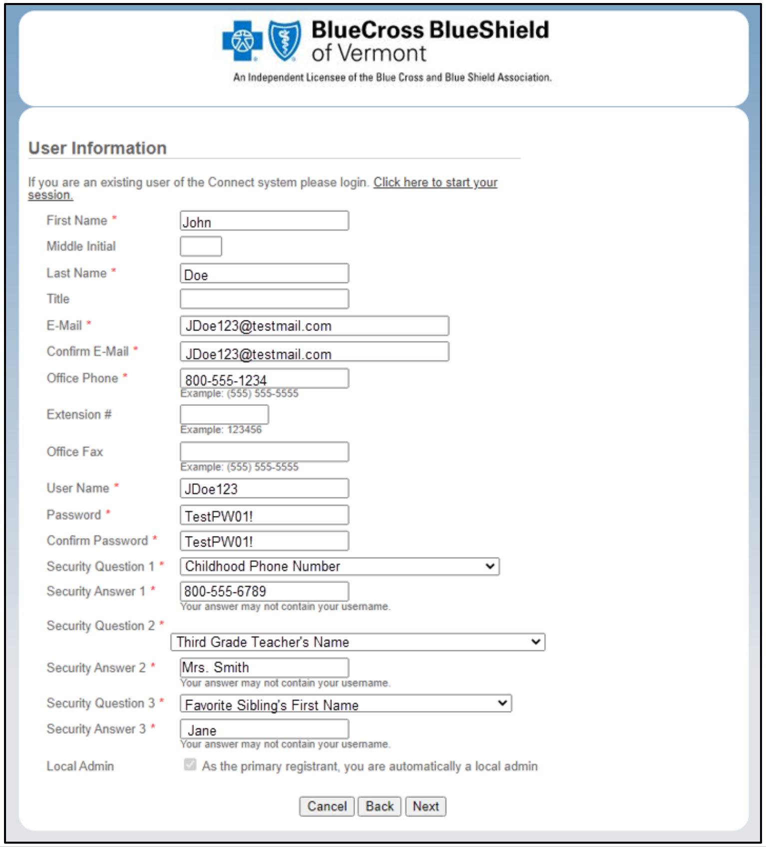
If you are the first individual registering for your group you will be assigned the local administrator role. This means you will have access to all the standard features of the ERC (same access as the user role) plus the system administrator feature for setting up and overseeing all other users of the 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..)

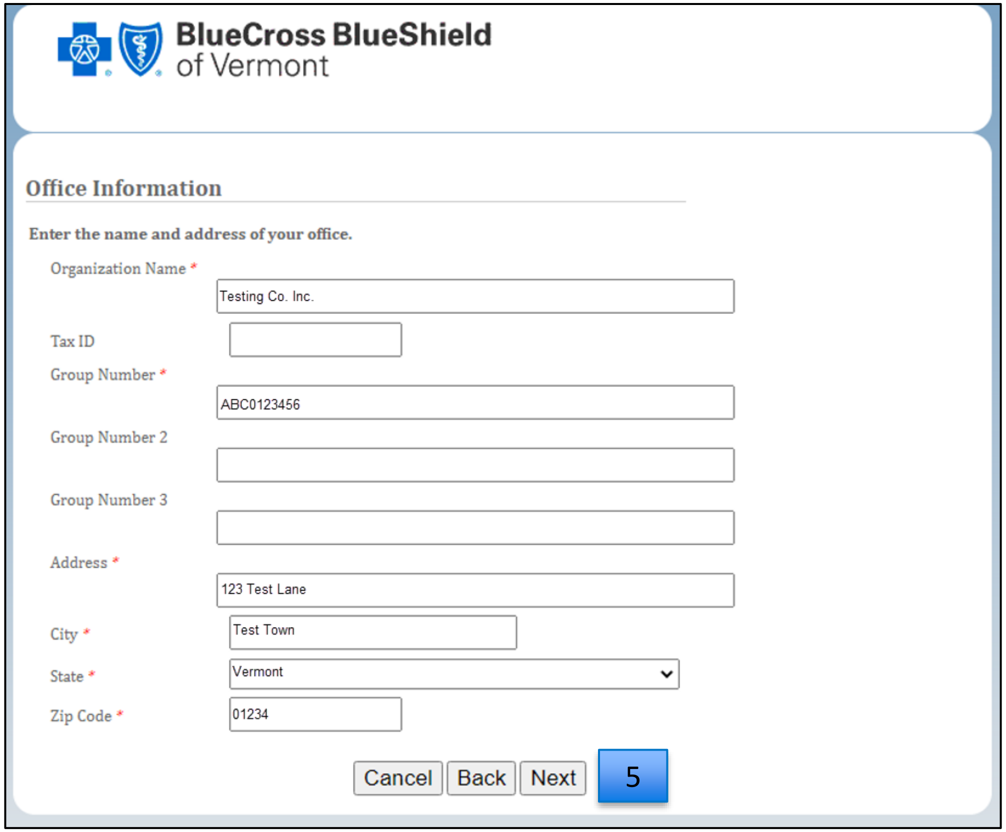
4. Enter required information. **Be sure to make note of your username and password**. Confirmation will be sent to the email address you provide.

4



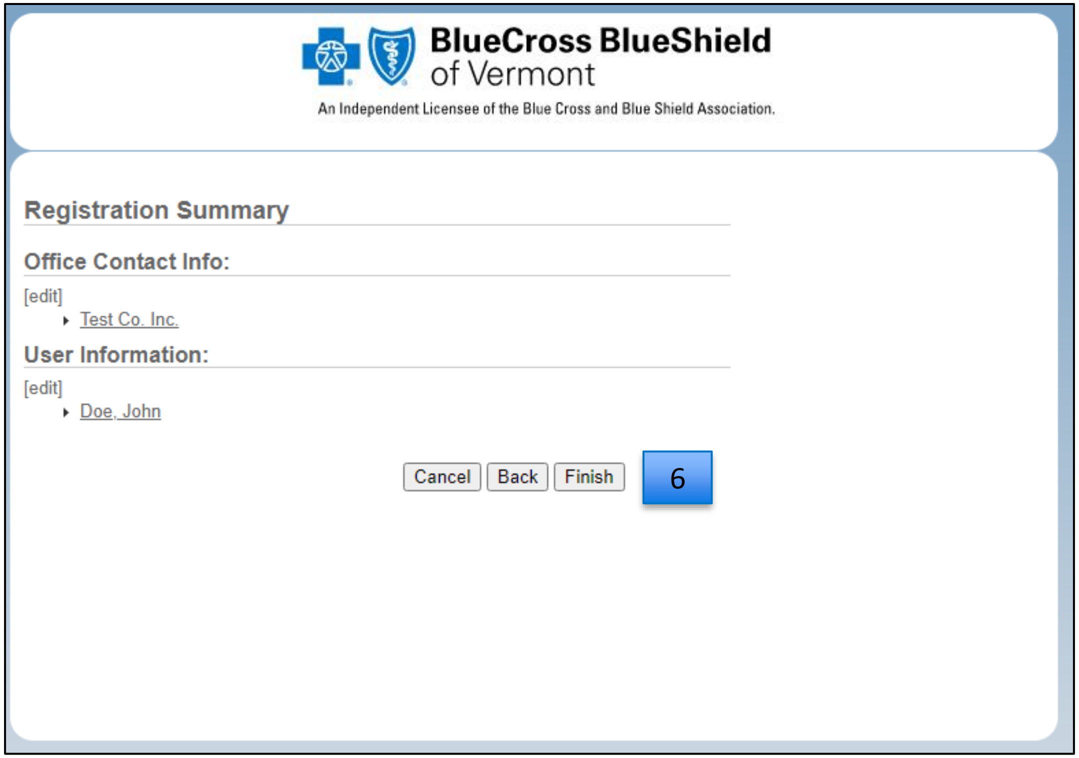
SECTION 1: USER REGISTRATION (CONT..)

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



SECTION 1: USER REGISTRATION (CONT..)

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



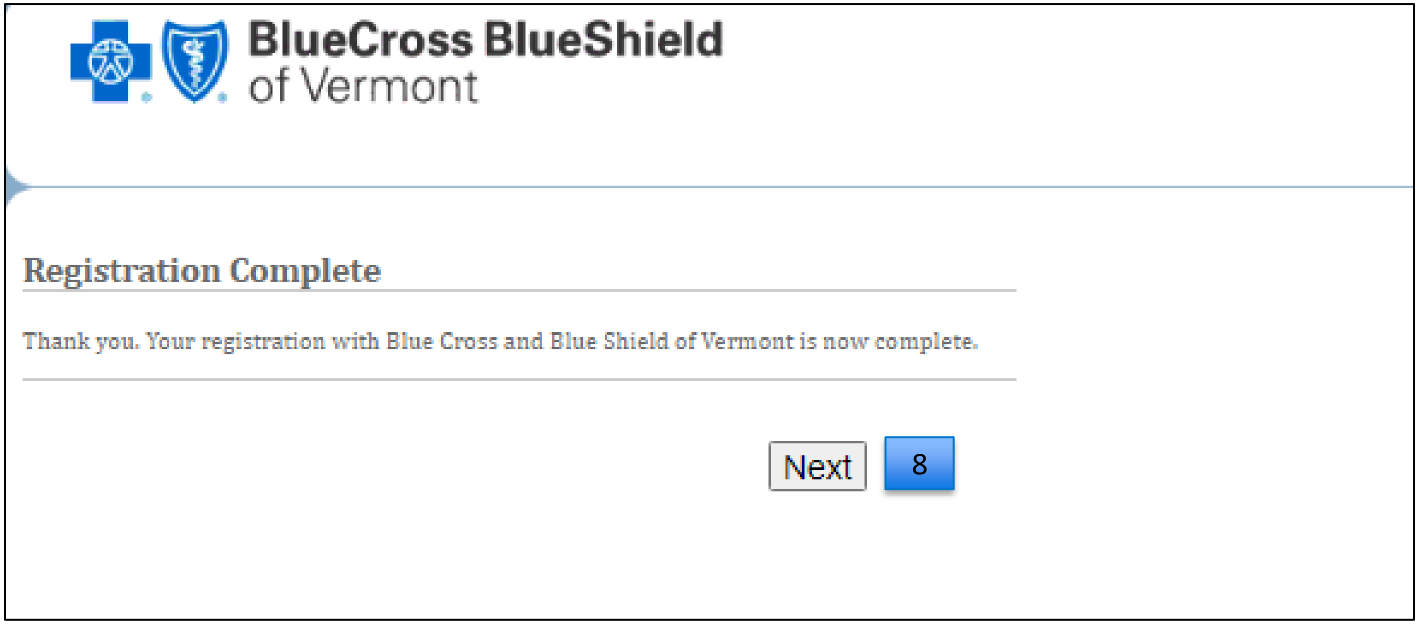
SECTION 1: USER REGISTRATION (CONT..)

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

SECTION 1: USER REGISTRATION (CONT..)

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

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

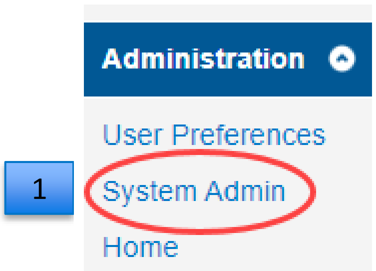


SECTION 2:

SYSTEM ADMIN – VIEWING USERS

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

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SECTION 3:

SYSTEM ADMIN – ADDING A NEW USER

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

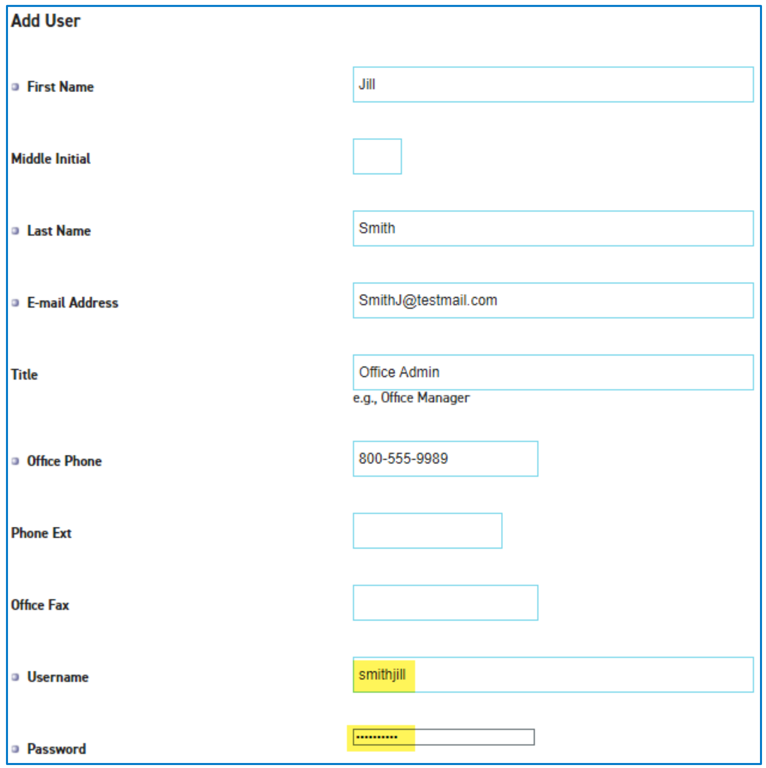
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
Doe, John	Main Office Contact	Test Co. Inc.	241629	JDoe123	10/11/2022	Confirmed	316573

Add User 1

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.

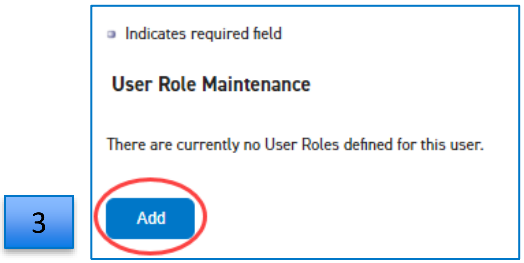
2



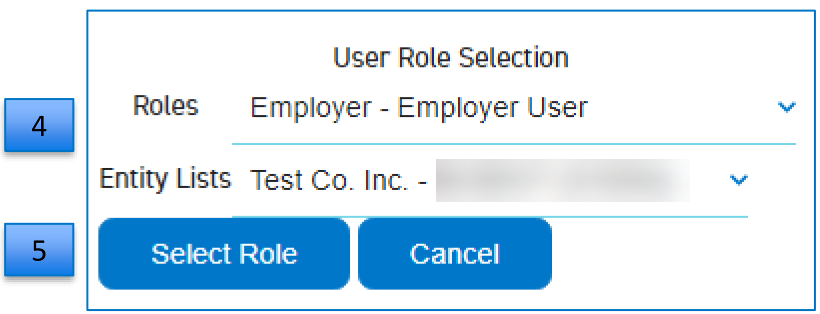
***Important information:** You will need to assign a user role to your new user under User Role Maintenance. (The user will not be added unless a role is selected)*

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”



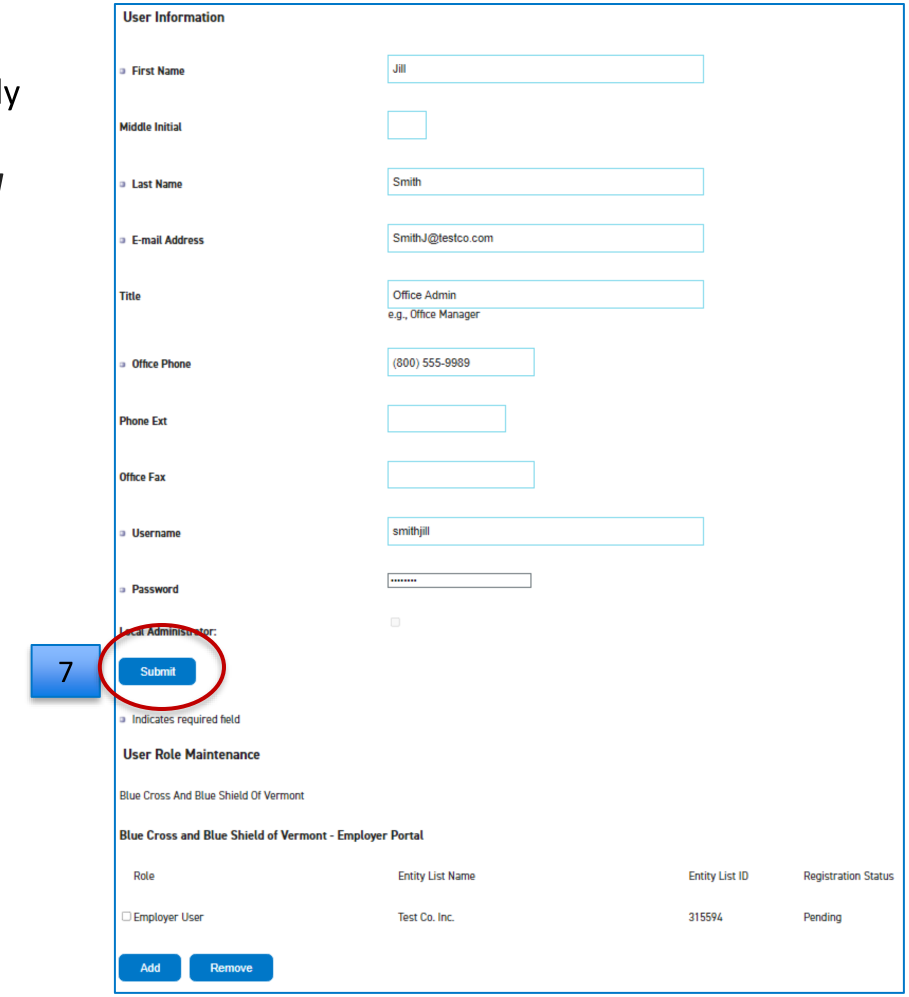
4. Select Employer-Employer User role from the drop-down menu and confirm the Entity List is your group name.
5. Select “Select Role.”



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

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

** Registration status should reflect **Confirmed***

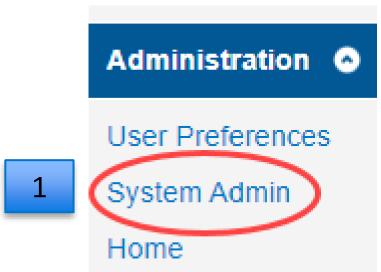


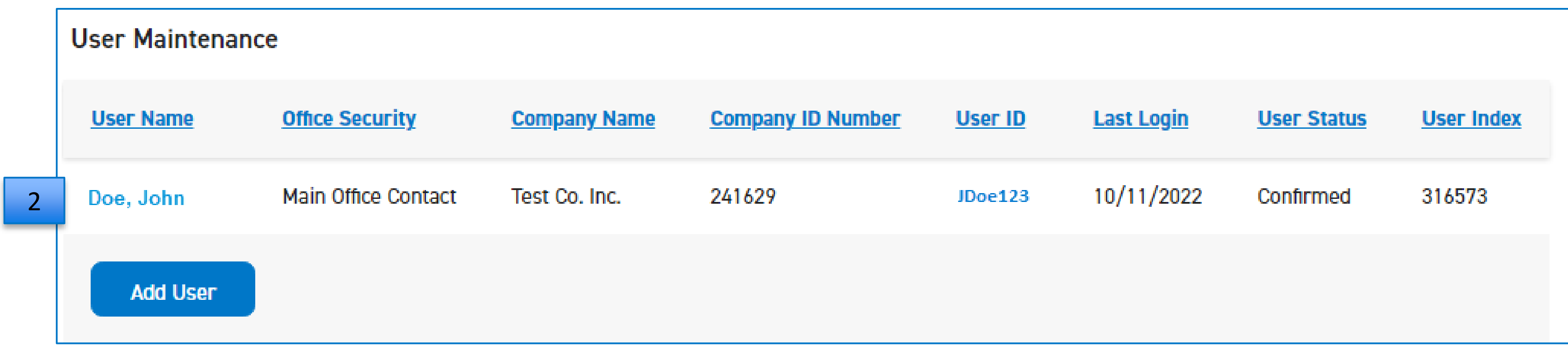
SECTION 4:

SYSTEM ADMIN – EDITING USER INFORMATION

SECTION 4: SYSTEM ADMIN – EDITING USER INFORMATION

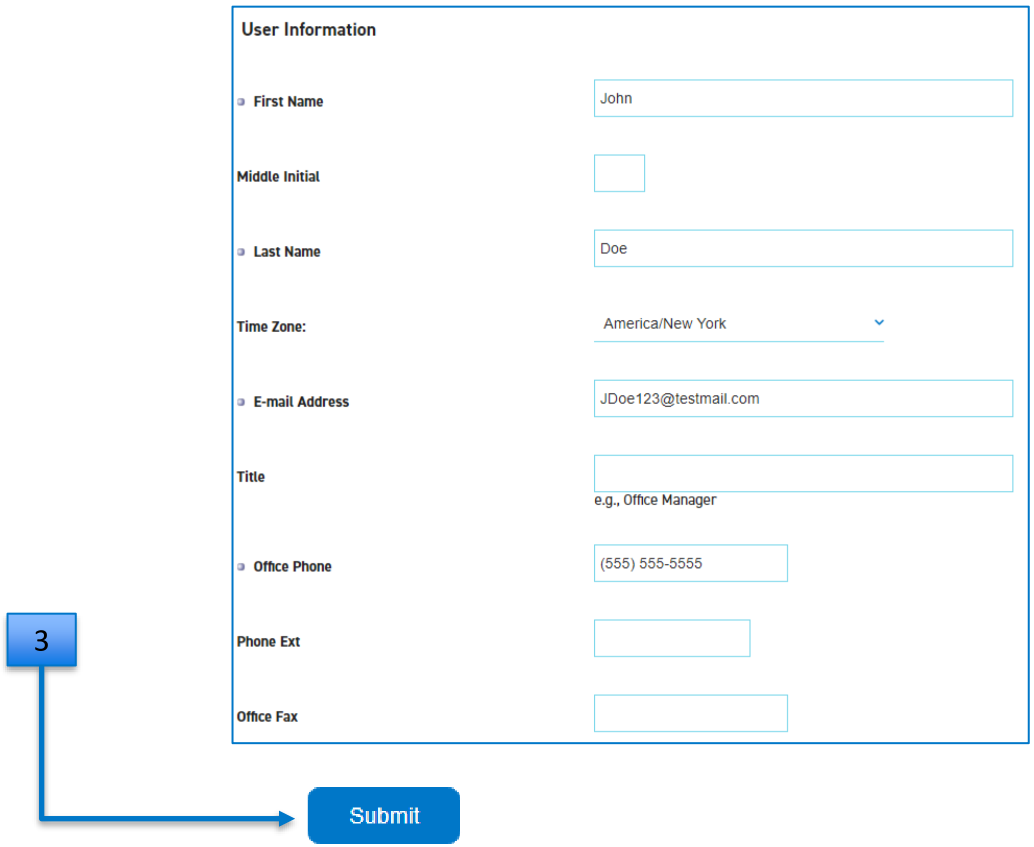
1. Select "System Admin." **Only the local administrator can view users**.
2. "User Maintenance" will appear, listing all users on your group's access list. Click on the user's name.





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

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



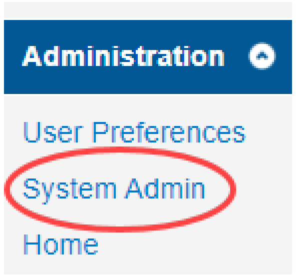
SECTION 5:

SYSTEM ADMIN – REMOVING USERS

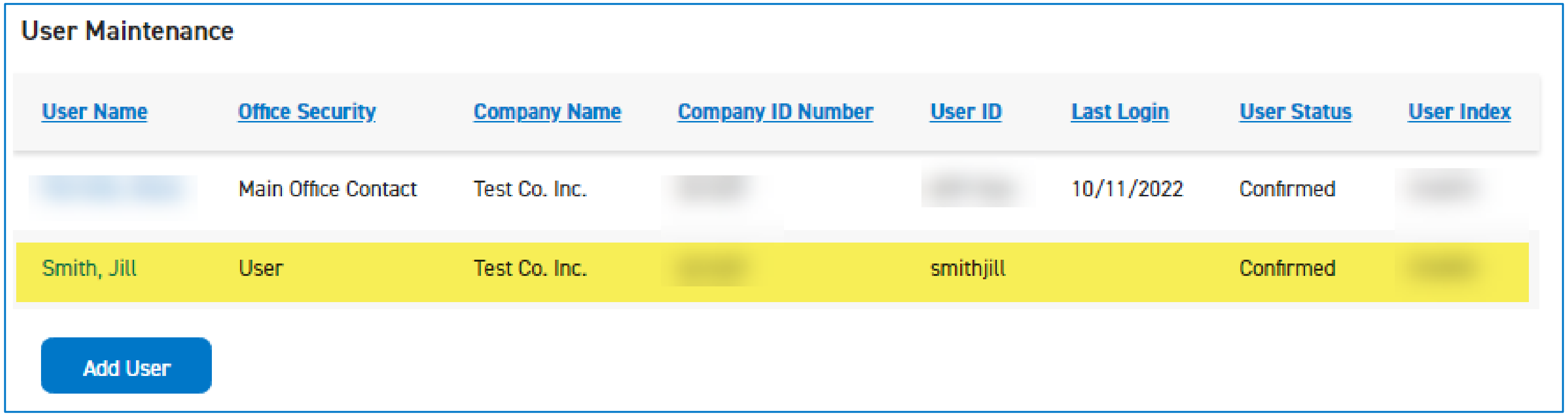
SECTION 5: SYSTEM ADMIN – REMOVING USERS

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.

1



2



User Maintenance

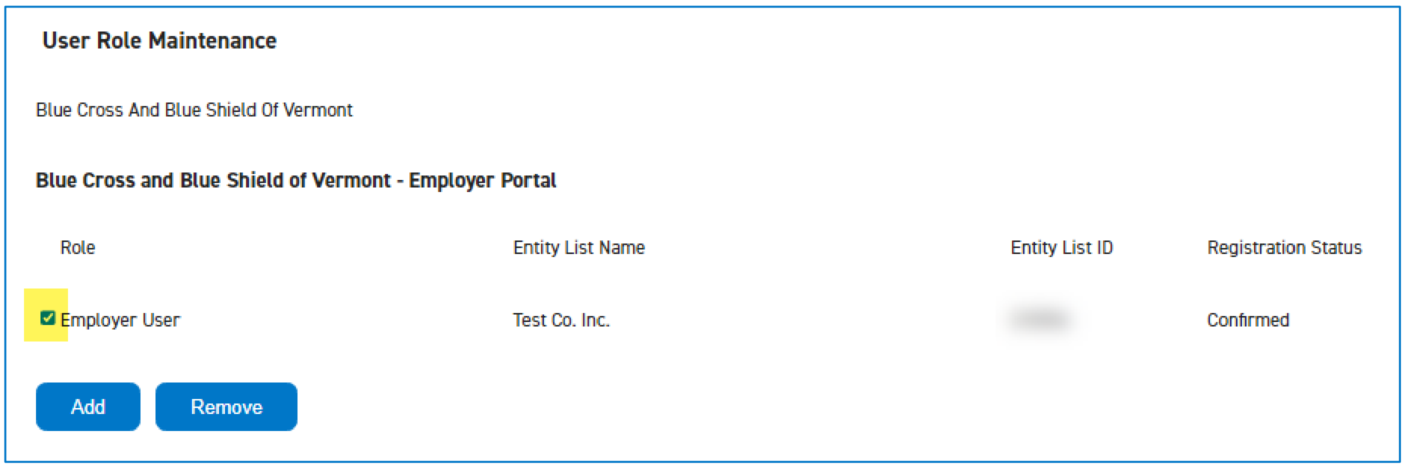
User Name	Office Security	Company Name	Company ID Number	User ID	Last Login	User Status	User Index
	Main Office Contact	Test Co. Inc.			10/11/2022	Confirmed	
Smith, Jill	User	Test Co. Inc.		smithjill		Confirmed	

Add User

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”.

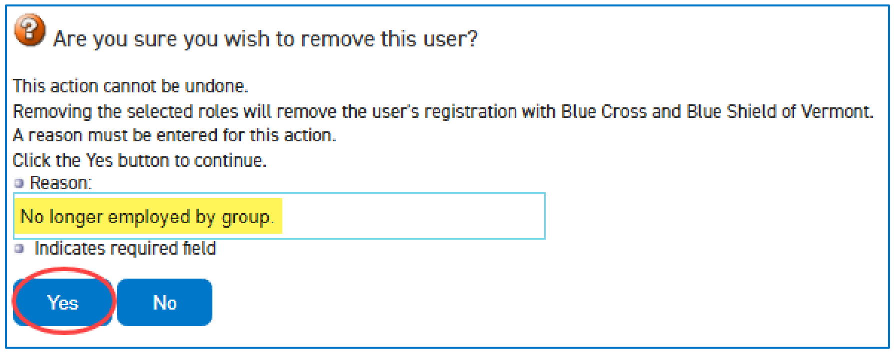
3



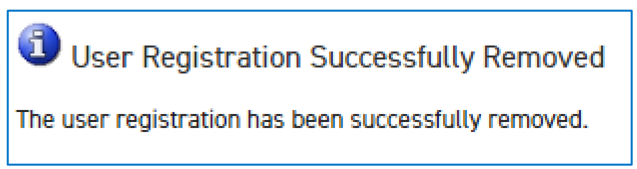
SECTION 5: SYSTEM ADMIN – REMOVING USERS

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

4



5



SECTION 6:

NAVIGATING THE HOMEPAGE

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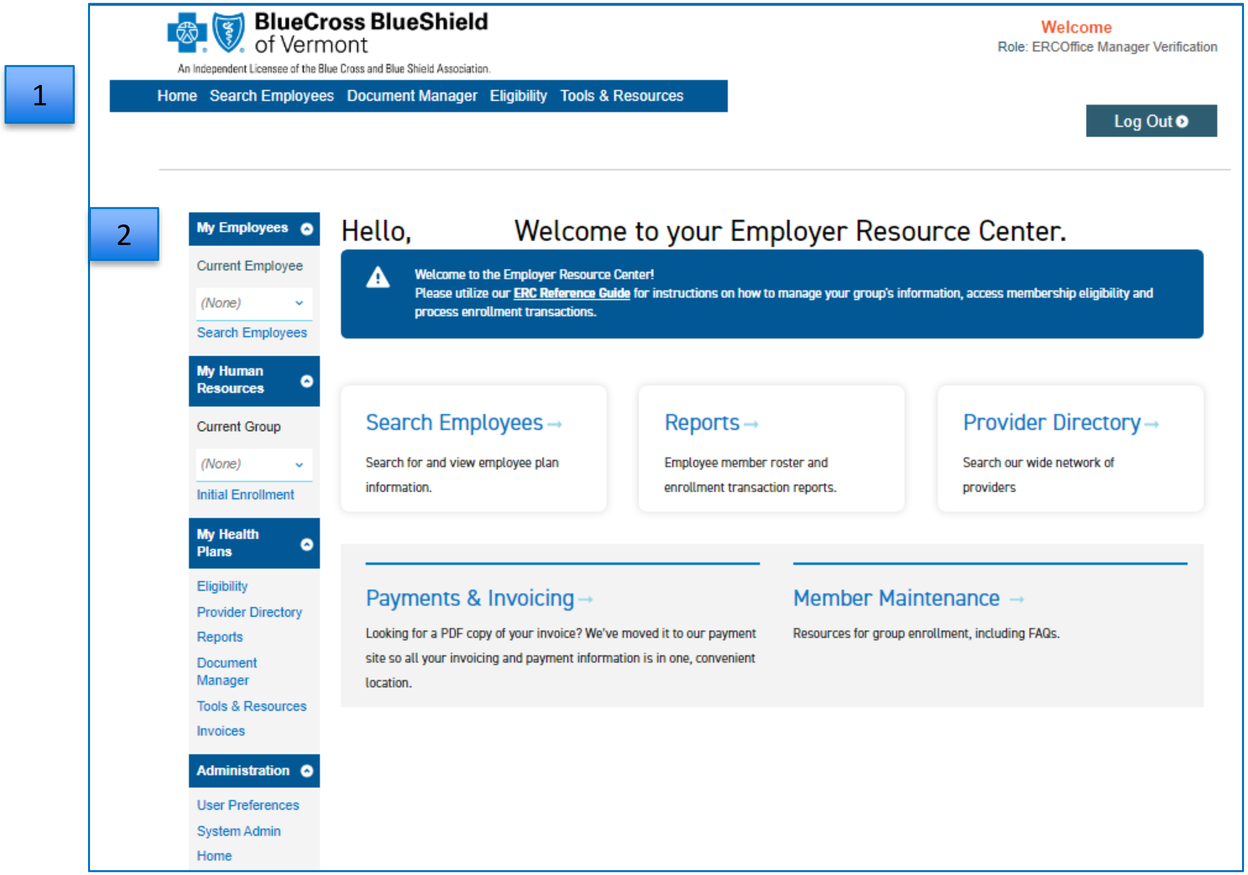
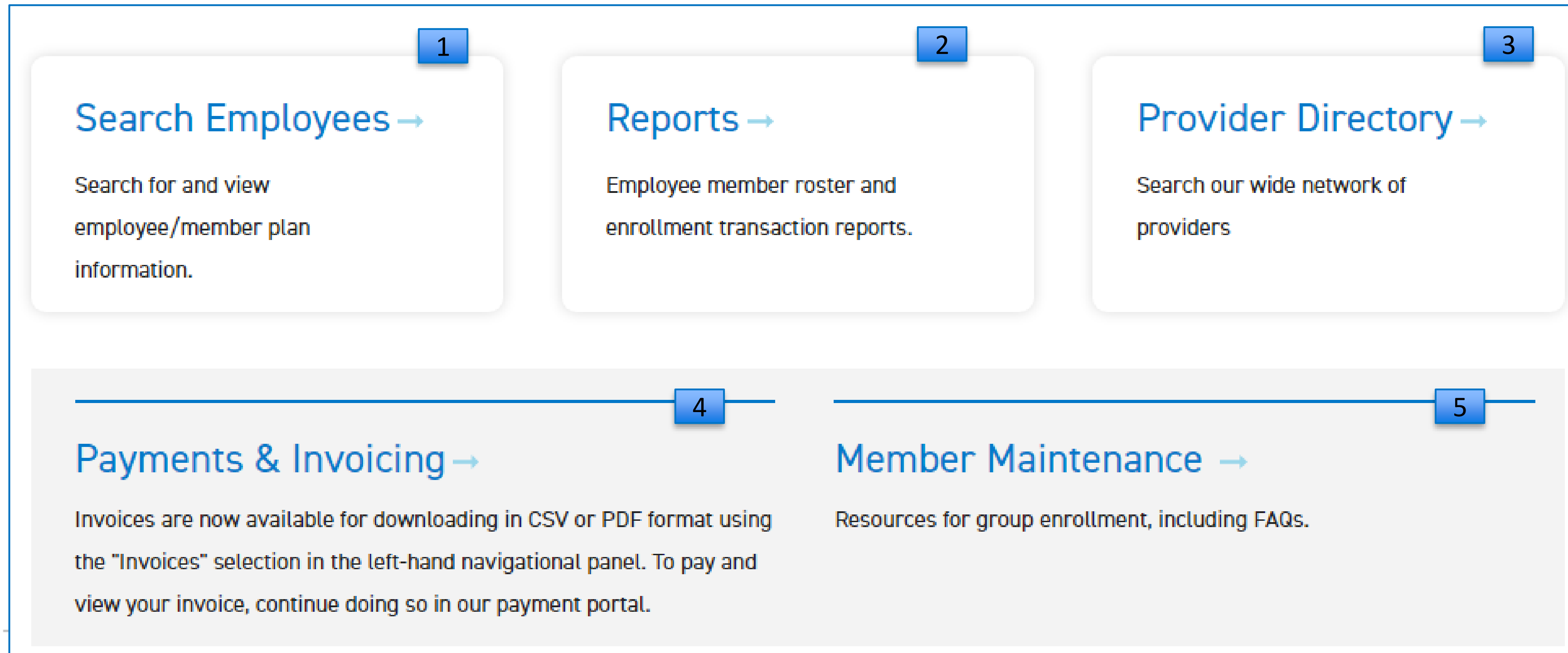
SECTION 6: HOMEPAGE

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.

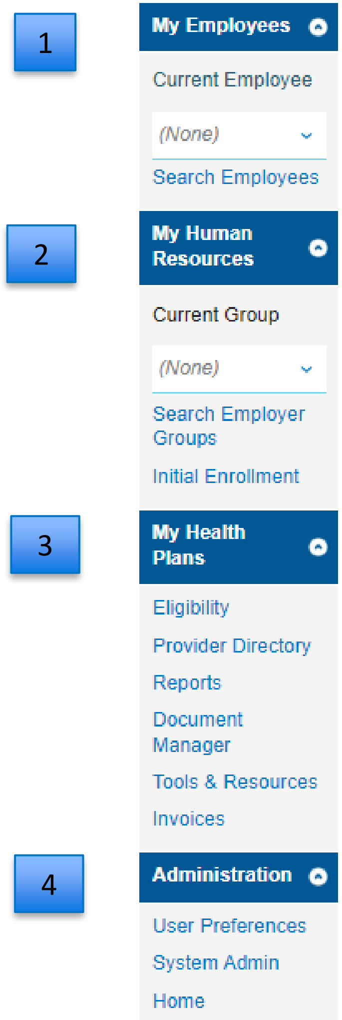


SECTION 6: HOMEPAGE OPTIONS

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.



SECTION 6: LEFT-HAND NAVIGATION



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

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

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

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

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SECTION 7:

MY EMPLOYEES

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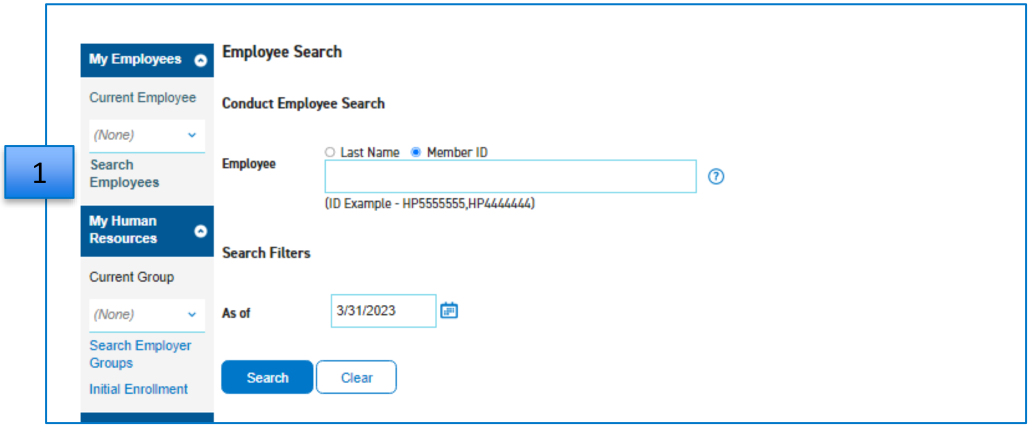
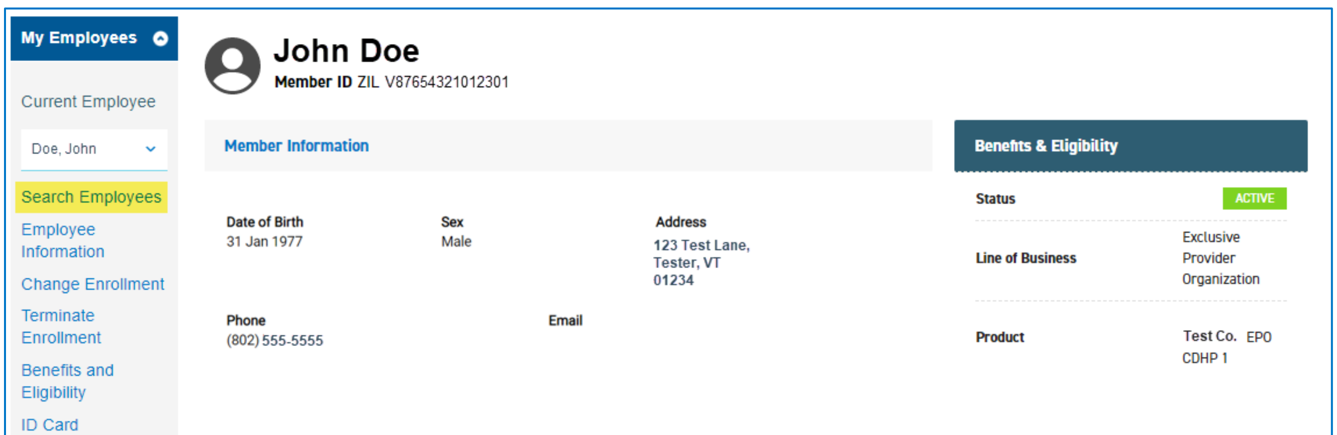
SECTION 7: MY EMPLOYEES

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.*



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



SECTION 7: MY EMPLOYEES

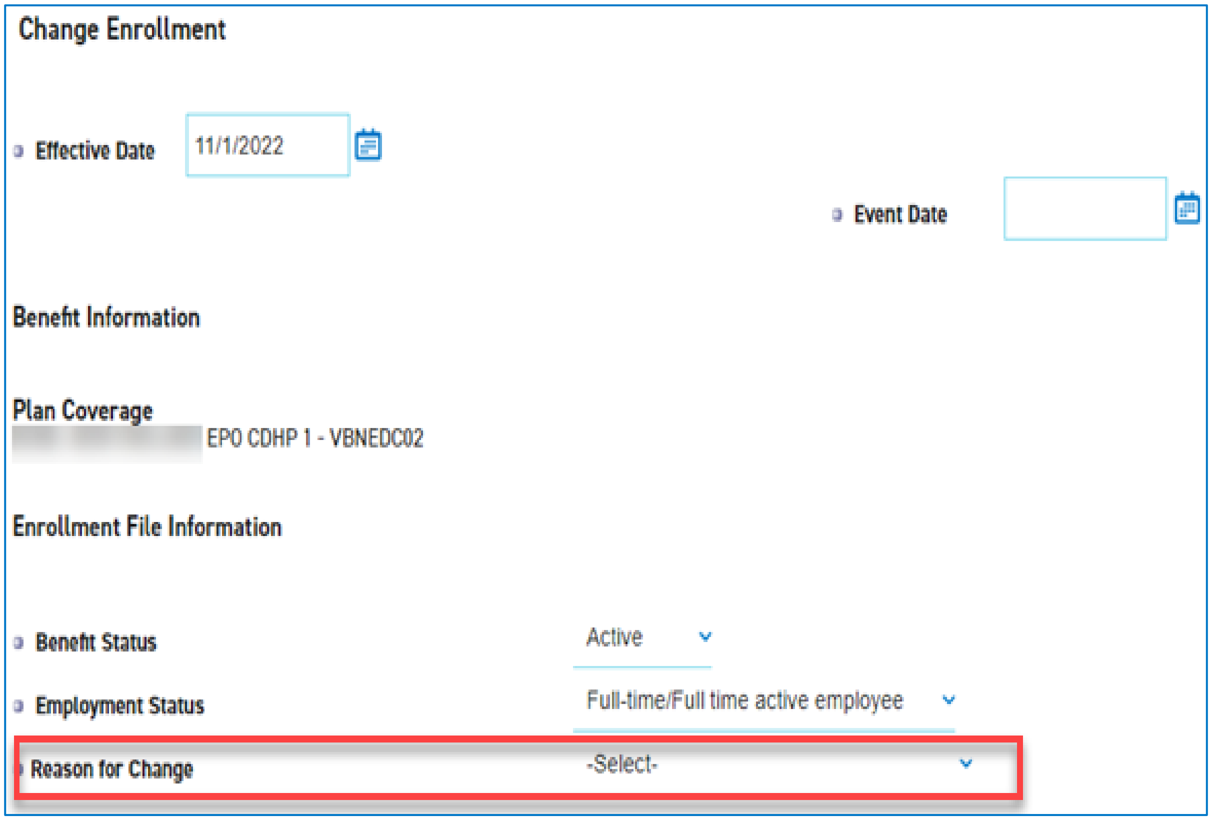
Once you have selected the employee, you can perform the following actions located in the left-hand navigation bar:

- **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 following are valid Reason’s for Change:

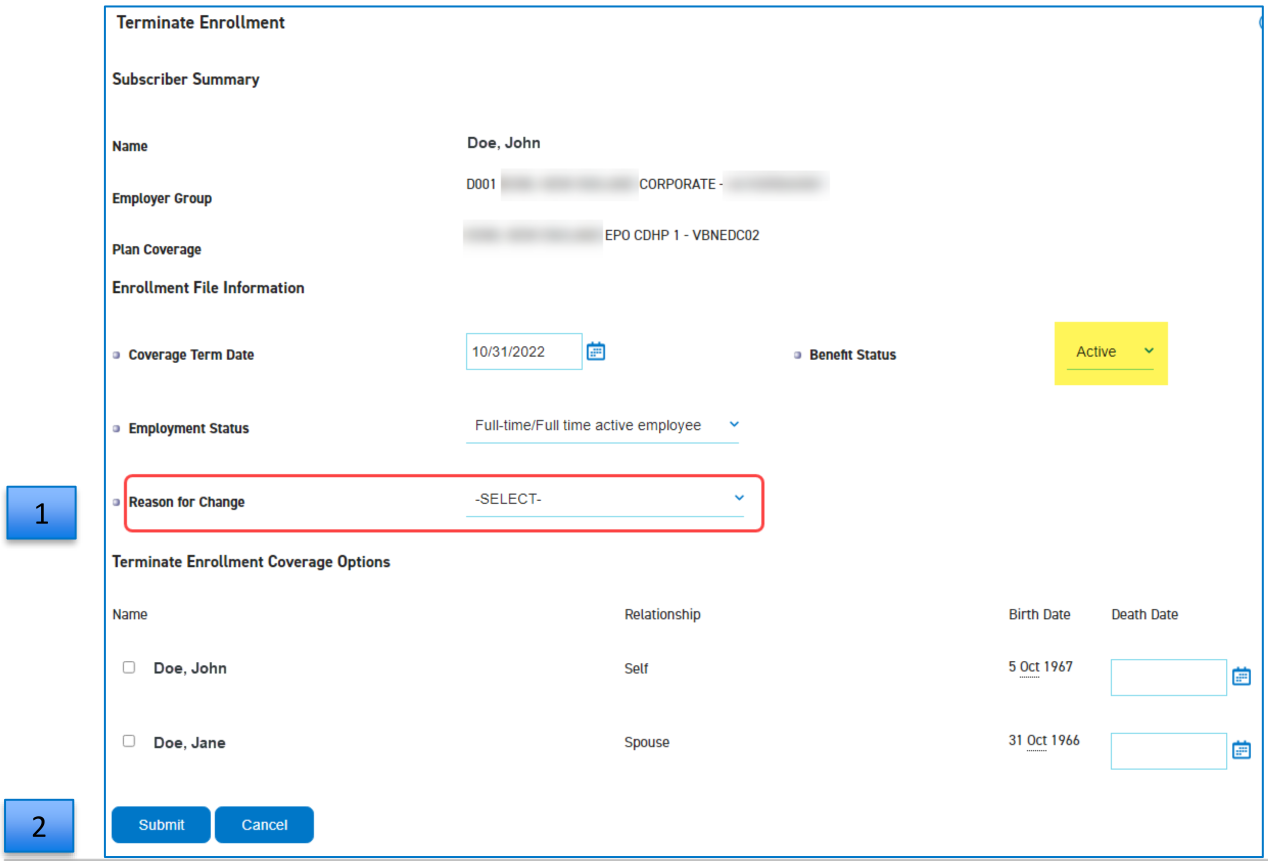
- **Birth** – add a newborn. **effective date should be the 1st day following the 60-day grace period. You can verify this date by searching for the newborn under Eligibility.*
- **Change in Identifying Data Elements** – change in name, gender, DOB, e-mail, contact phone number.
- *value is required 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.)

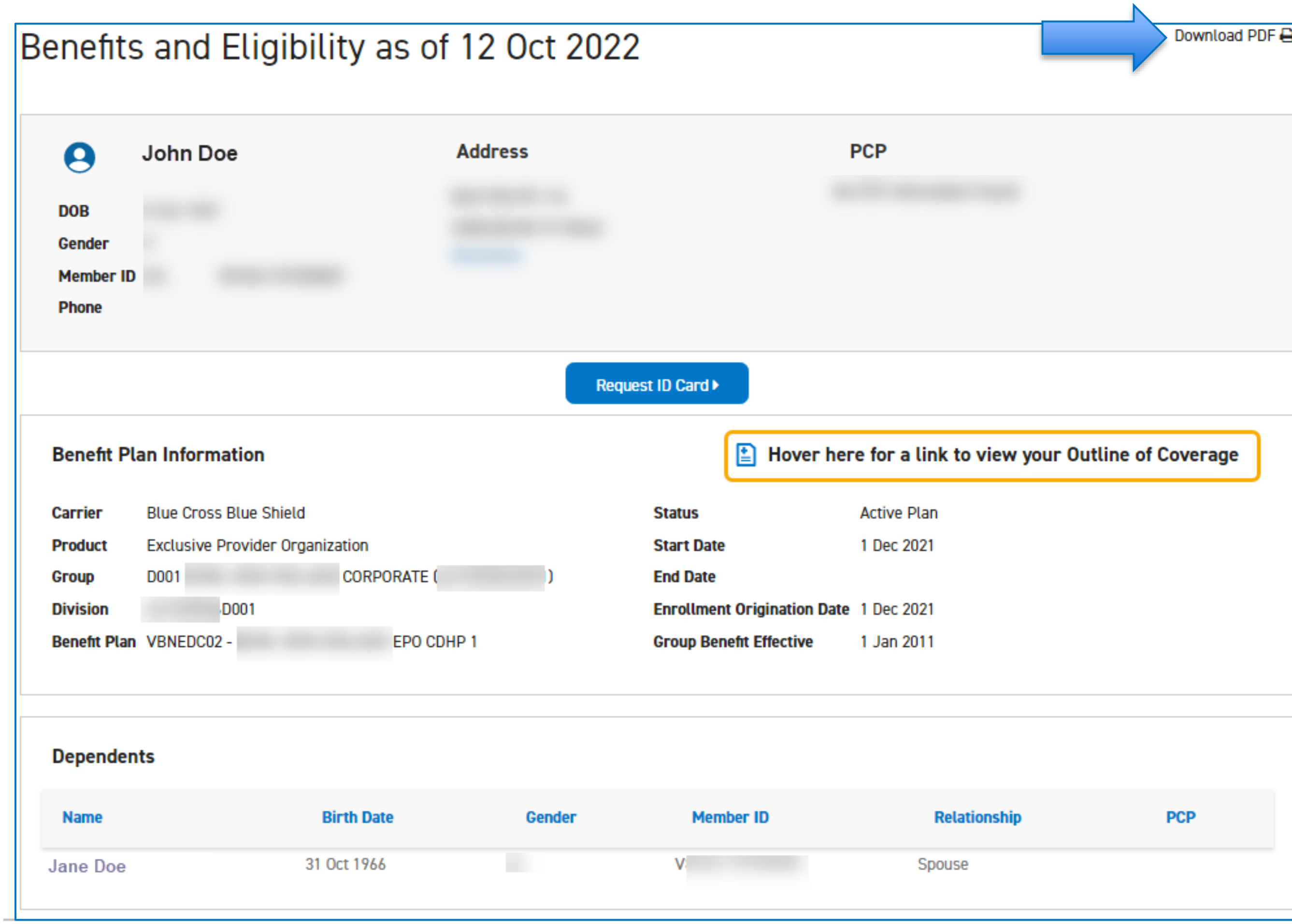


The following are valid Reason’s for Change:

- Death
- Divorce
- Termination of employment
- Voluntary withdrawal

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

DOB

Gender

Member ID

Phone

Address

PCP

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 CORPORATE ( )	**End Date**	
Division	D001	**Enrollment Origination Date**	1 Dec 2021
Benefit Plan	VBNEDC02 - EPO CDHP 1	**Group Benefit Effective**	1 Jan 2011

Dependents

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

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

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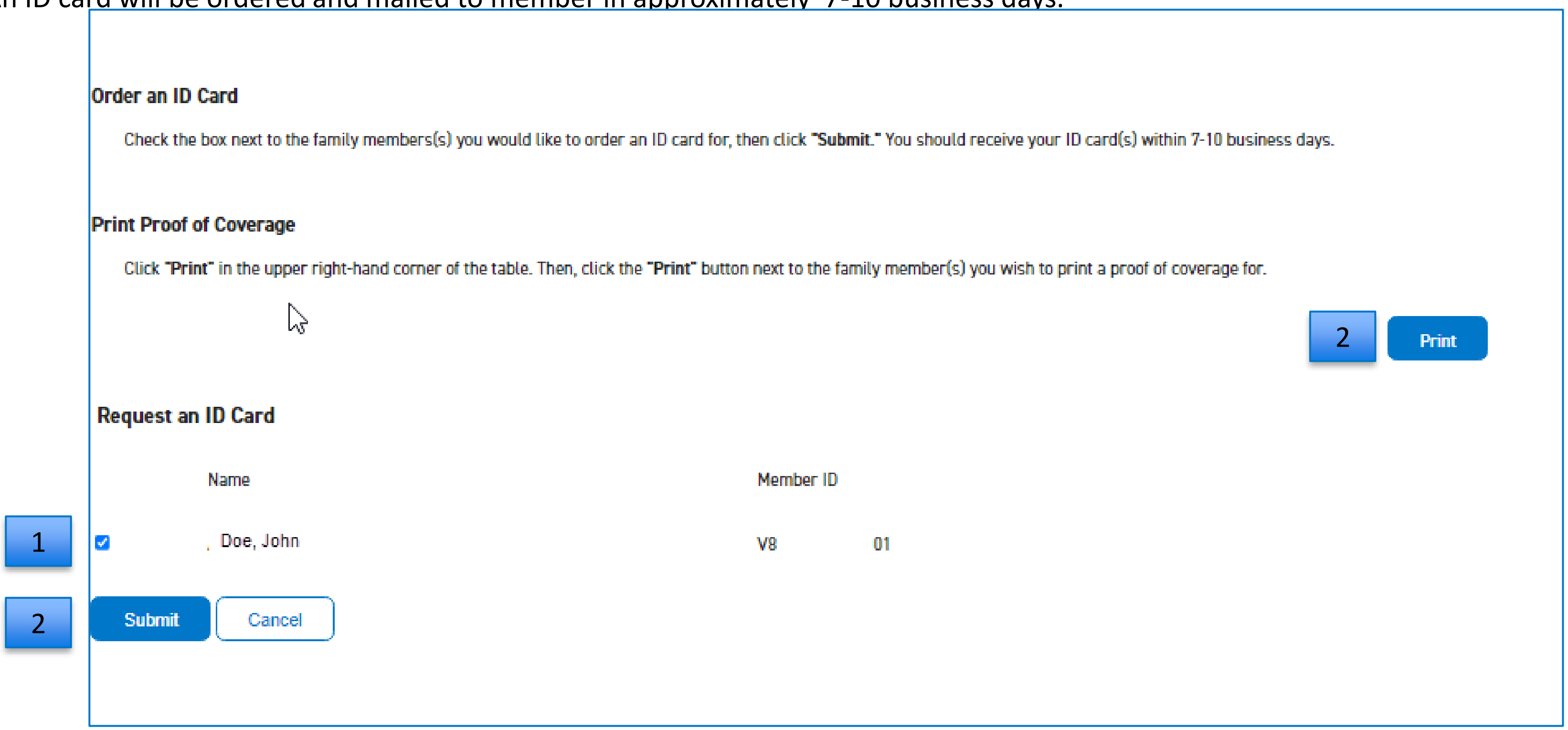
SECTION 7: MY EMPLOYEES-ID CARD

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.



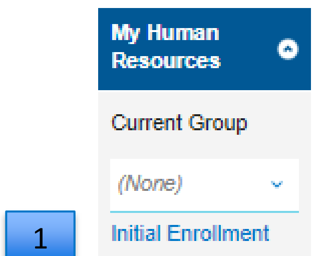
SECTION 8

MY HUMAN RESOURCES

SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

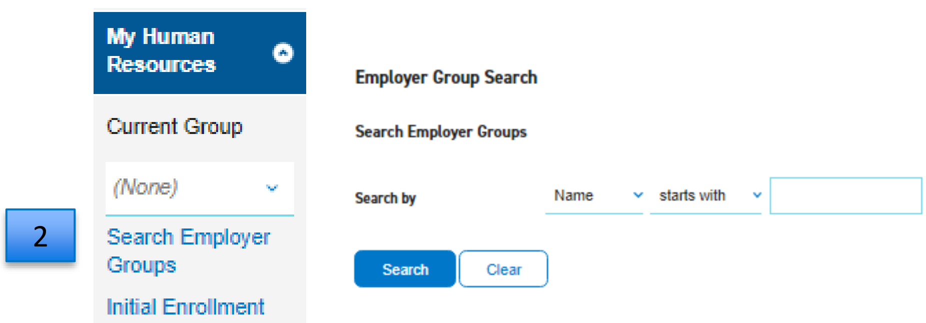
To begin your initial enrollment, you will need to select the group/division in which you're enrolling your employee. There are two examples below of how to perform this search, depending on your access. If you have more then 25 qualifying plans under your access, you will follow example 2.

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

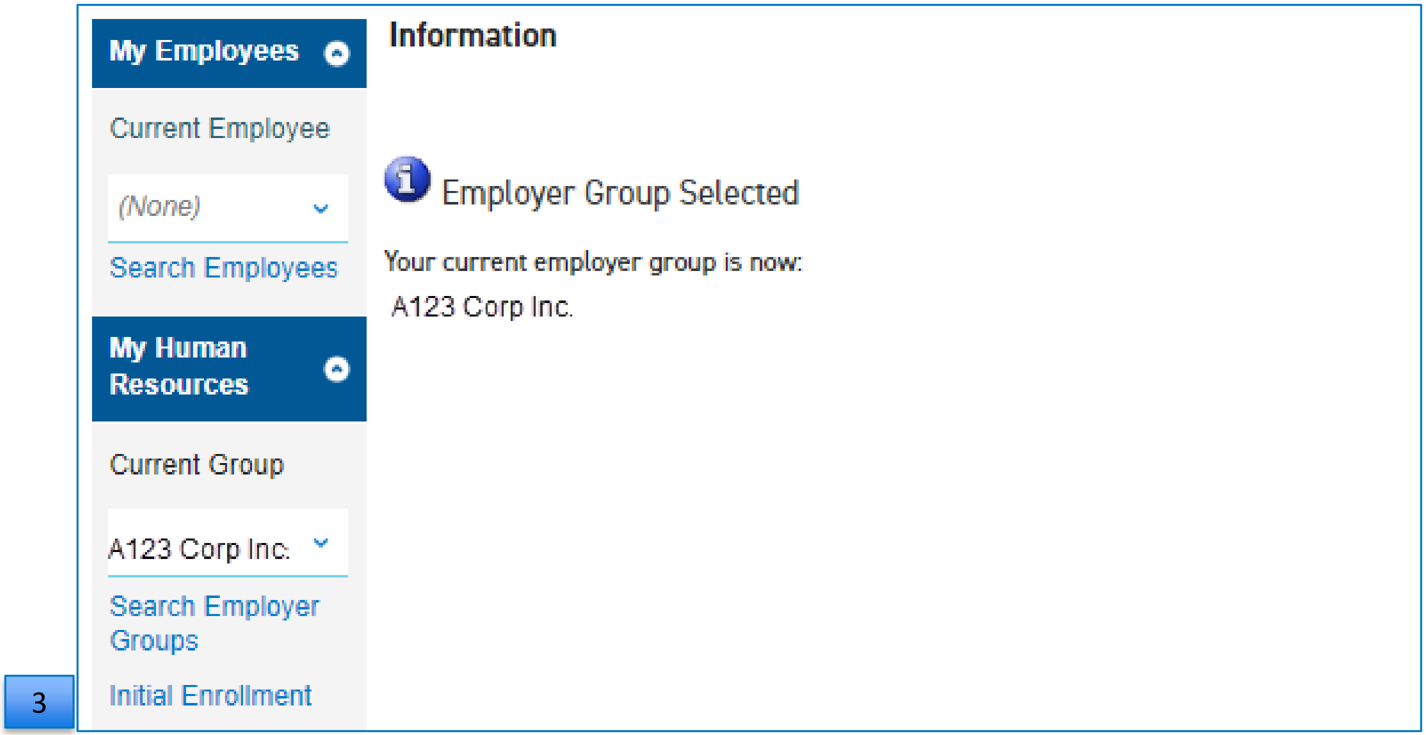
2. Under "My Human Resources," 'Search Employer Groups'. You will then be prompted to enter the name or number of the Group <u>and</u> Division that you are enrolling the employee in. Then hit "select".



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

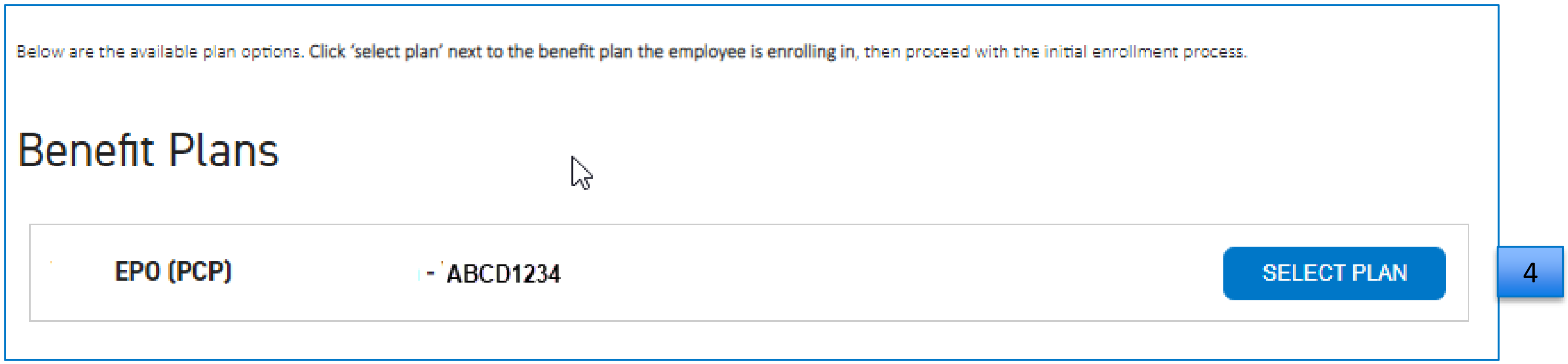
SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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



SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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



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

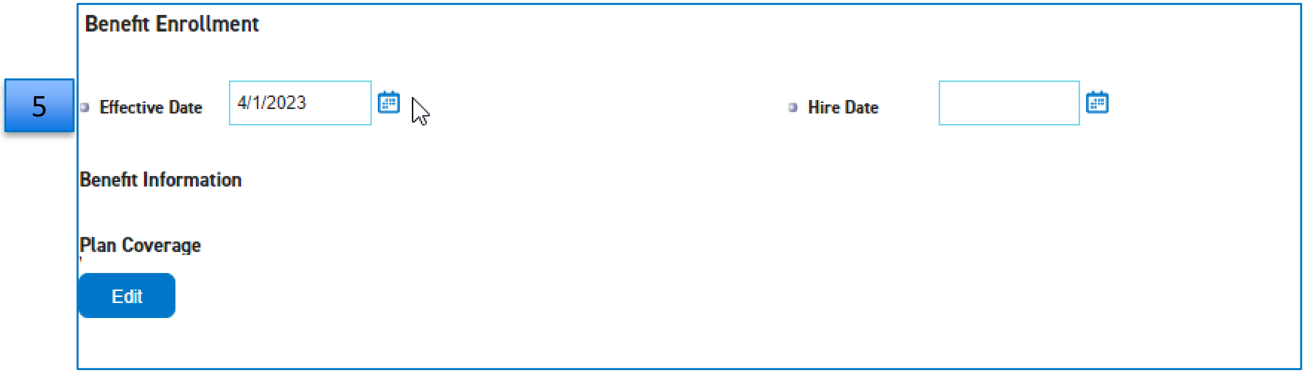
(Required fields are marked with the “ ” symbol.)

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.

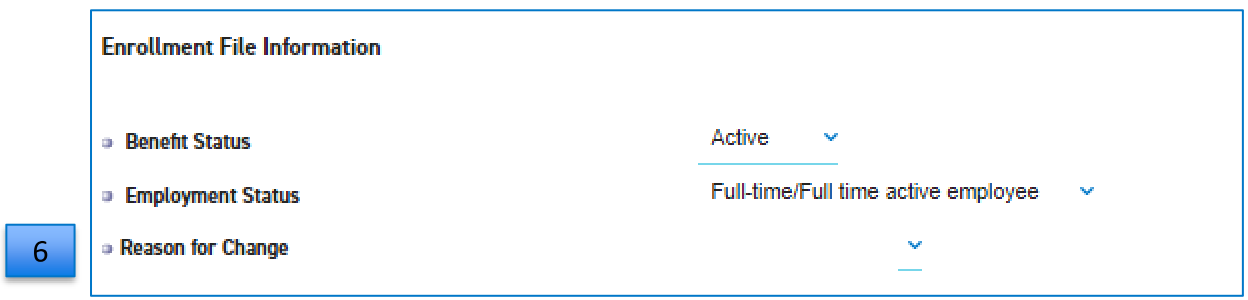


SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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.*



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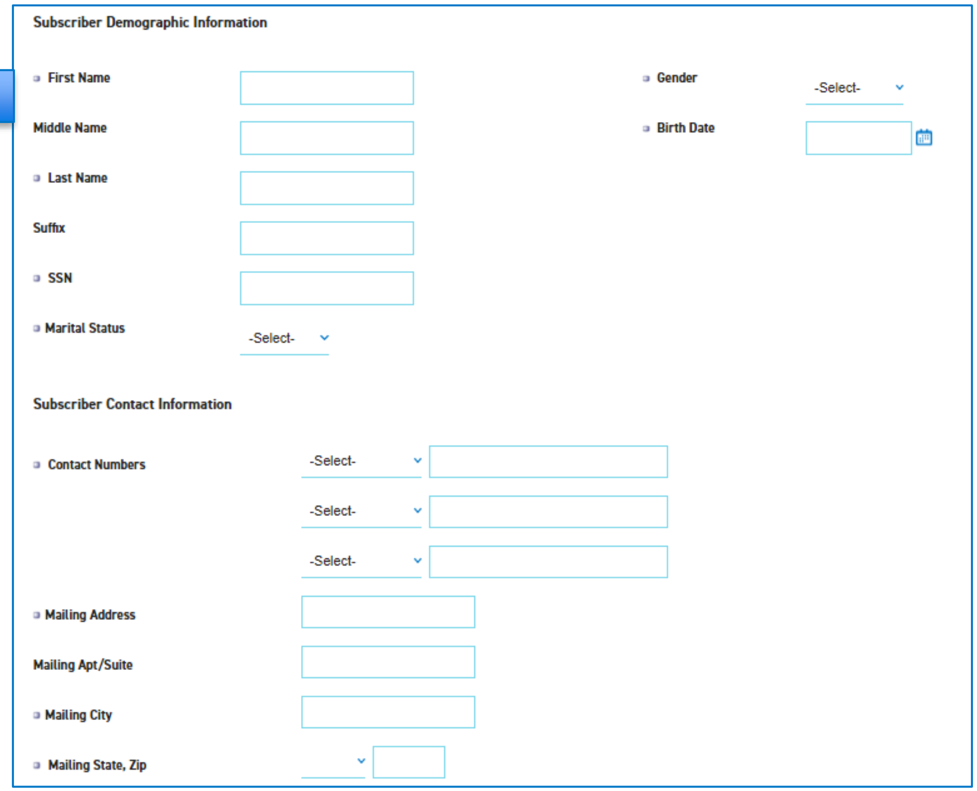
SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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



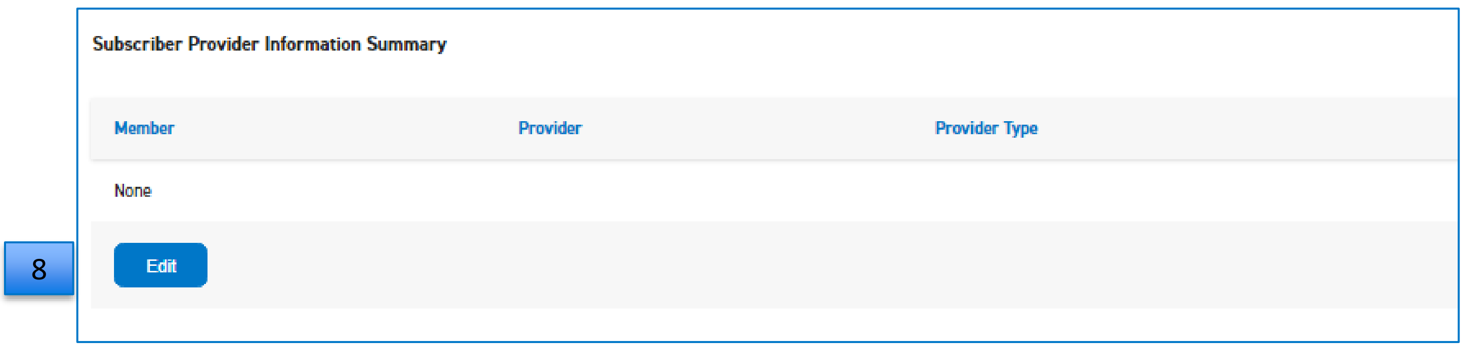
SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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.

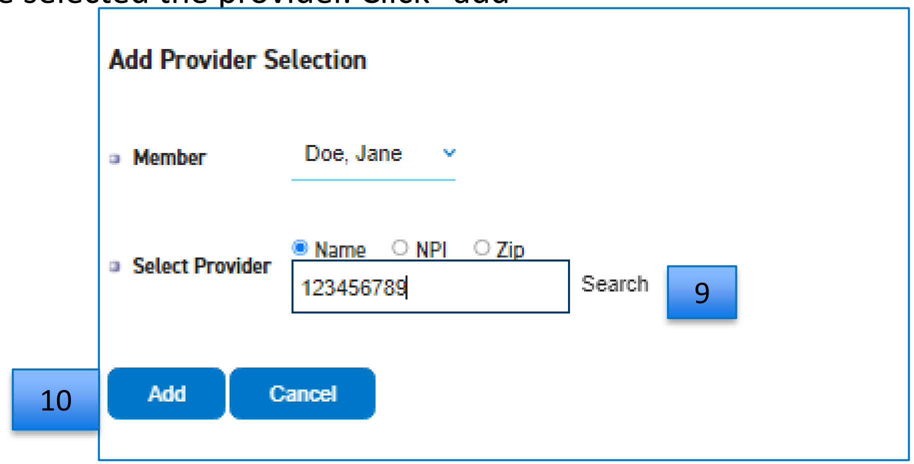
If your plan requires a primary care provider (PCP) a PCP must assigned to each member. A PCP must be assigned for each covered family member in order to enroll—unless subscriber or dependent resides outside of the Blue Cross VT network area (Vermont and contiguous counties).

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



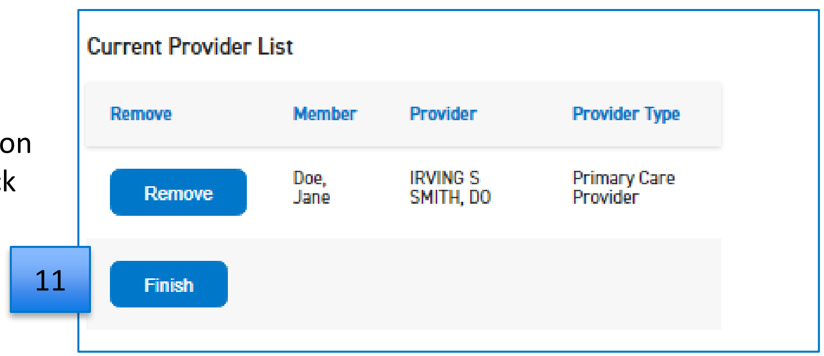
SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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”



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

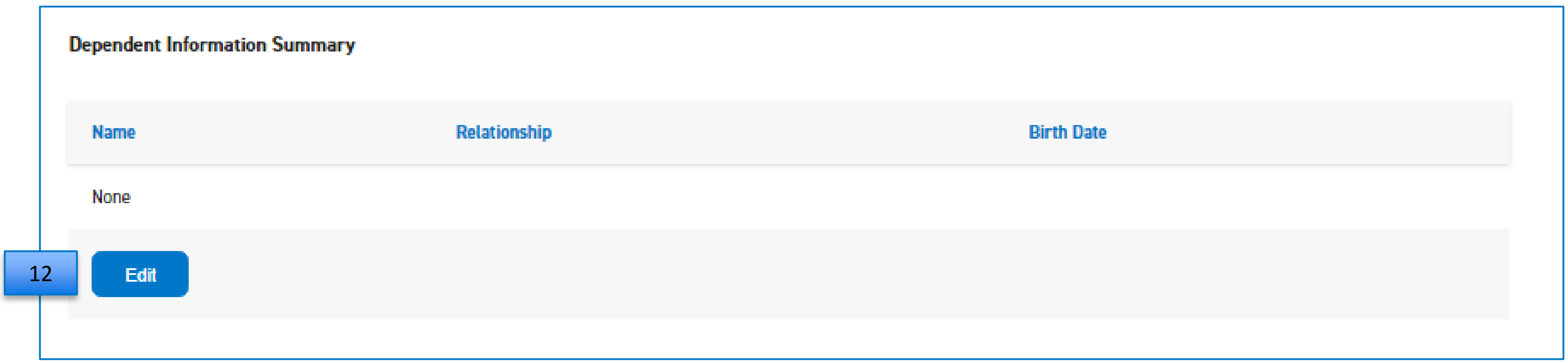
* To remove your selection and elect a new PCP. Click “Remove”



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

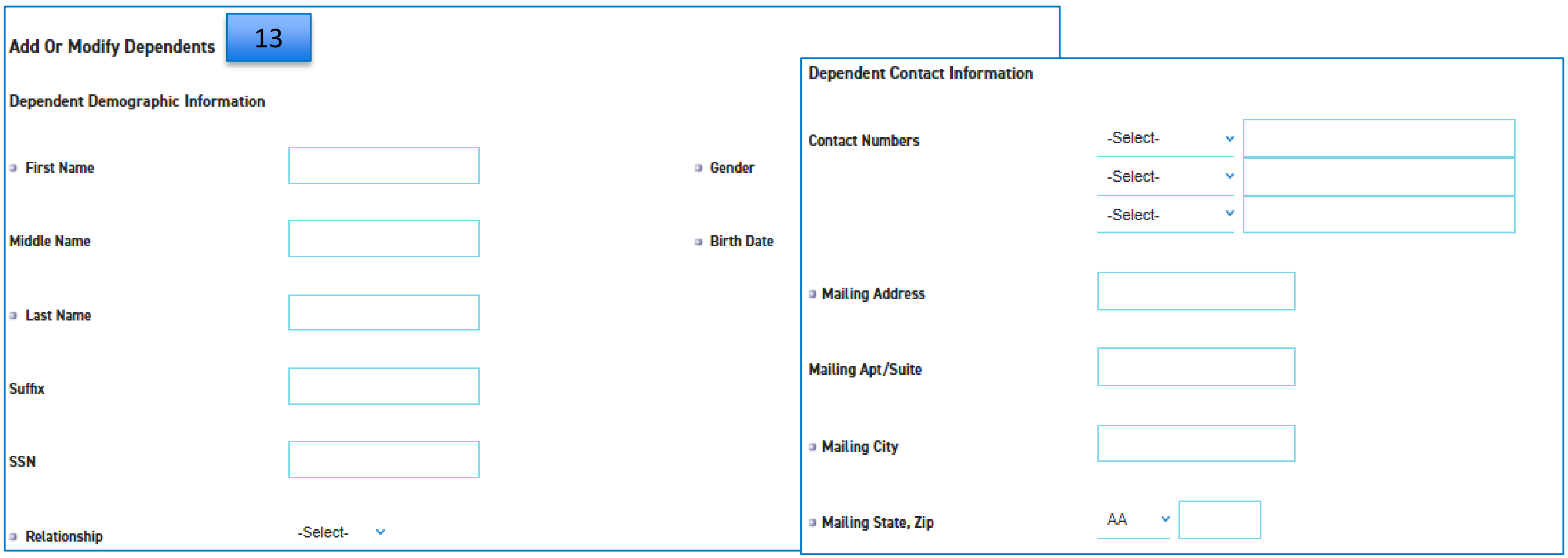


SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

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.

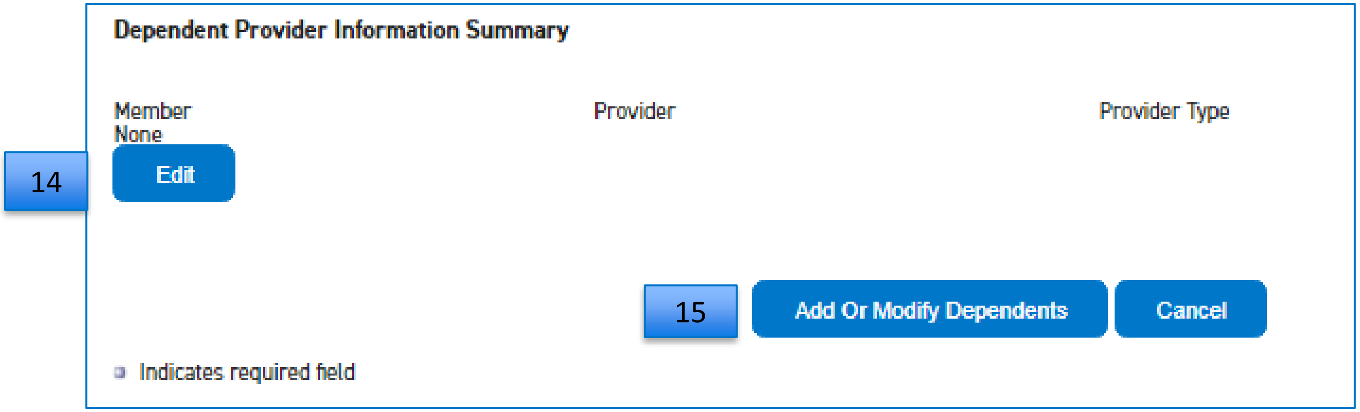
(Required fields are marked with the " ' symbol.)



SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

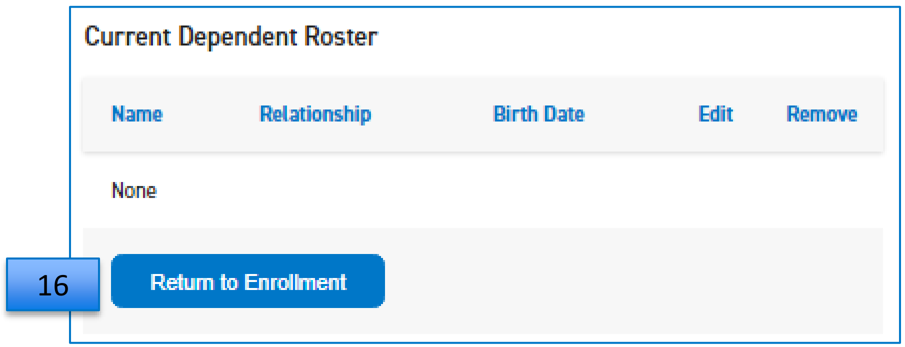
Are you apart of a managed care plan? If not, skip to step 15.

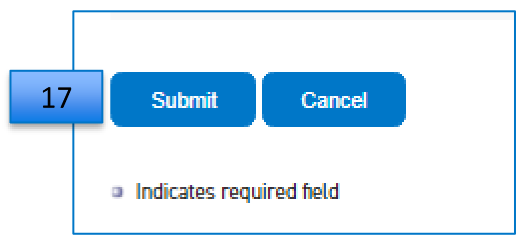
14. Select “edit” within the Subscriber Provider Information Summary to add a provider selection.
15. Select “Add or Modify Dependents” to add your dependent to the Current Dependent Roster



SECTION 8: MY HUMAN RESOURCES-INITIAL ENROLLMENT

16. Click “Return to Enrollment”
17. Once everything is complete, on “Submit”



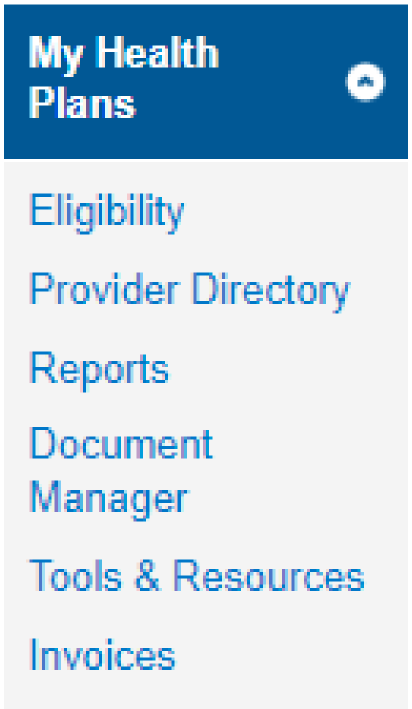


SECTION 9:

MY HEALTH PLANS

SECTION 9: MY HEALTH PLANS

Within ‘My Health Plans’ you can perform the following actions:

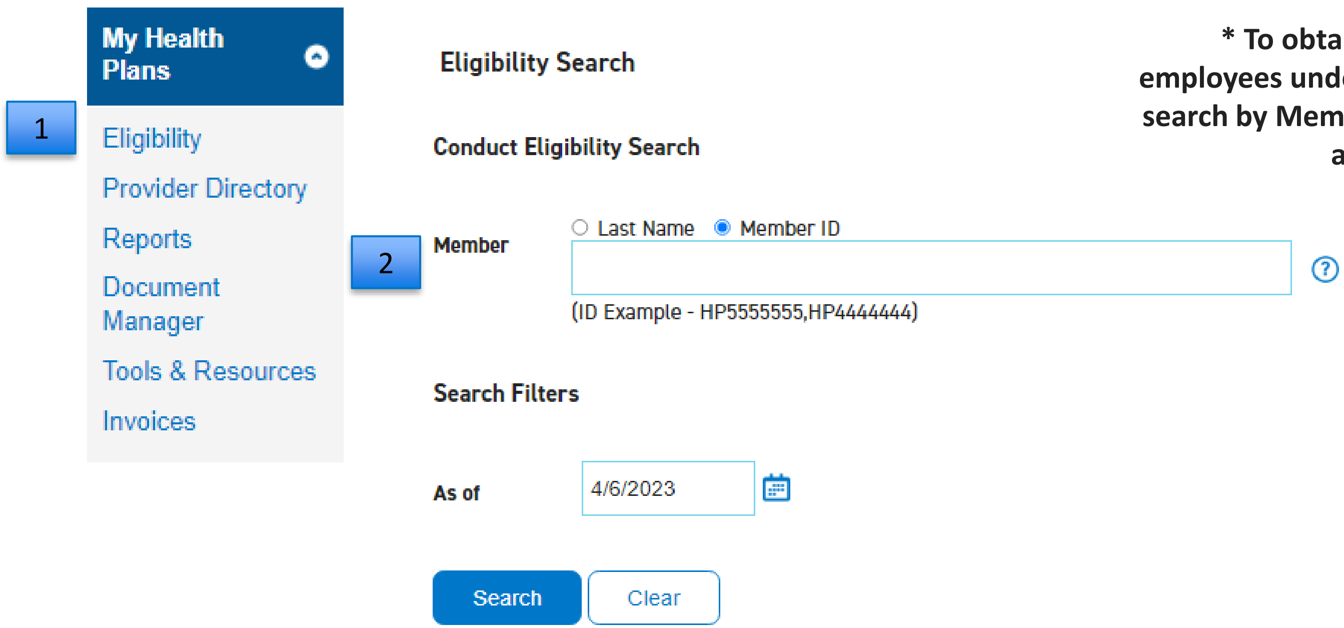


- **Eligibility** – search for all members, employees and their dependents
- **Provider Directory** – find a network provider
- **Reports** – run a membership roster, transaction reporting & employer group summary.
- **Document Manager** – store your historical reports
- **Tools and Resources** – provides 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.



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

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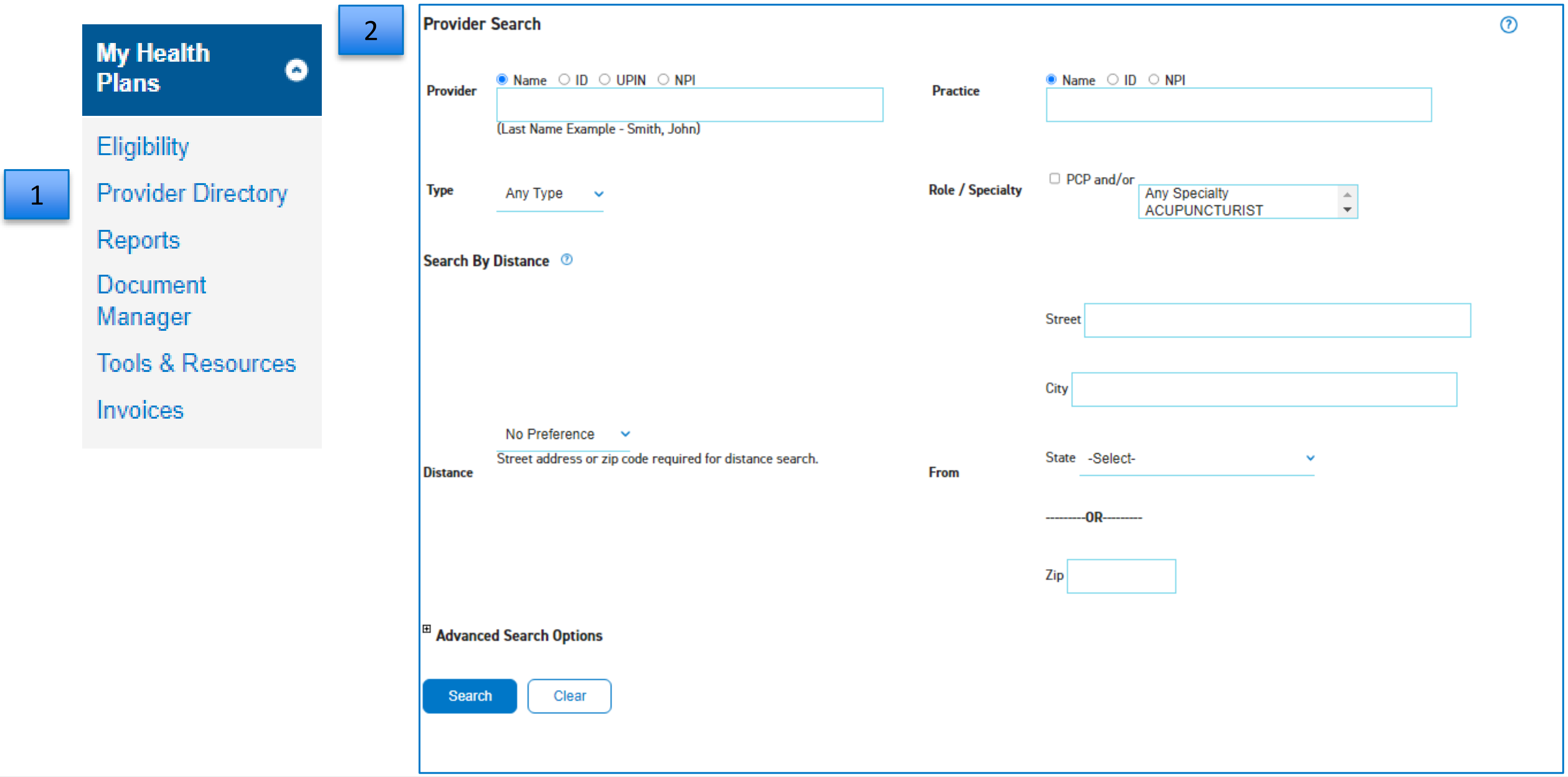
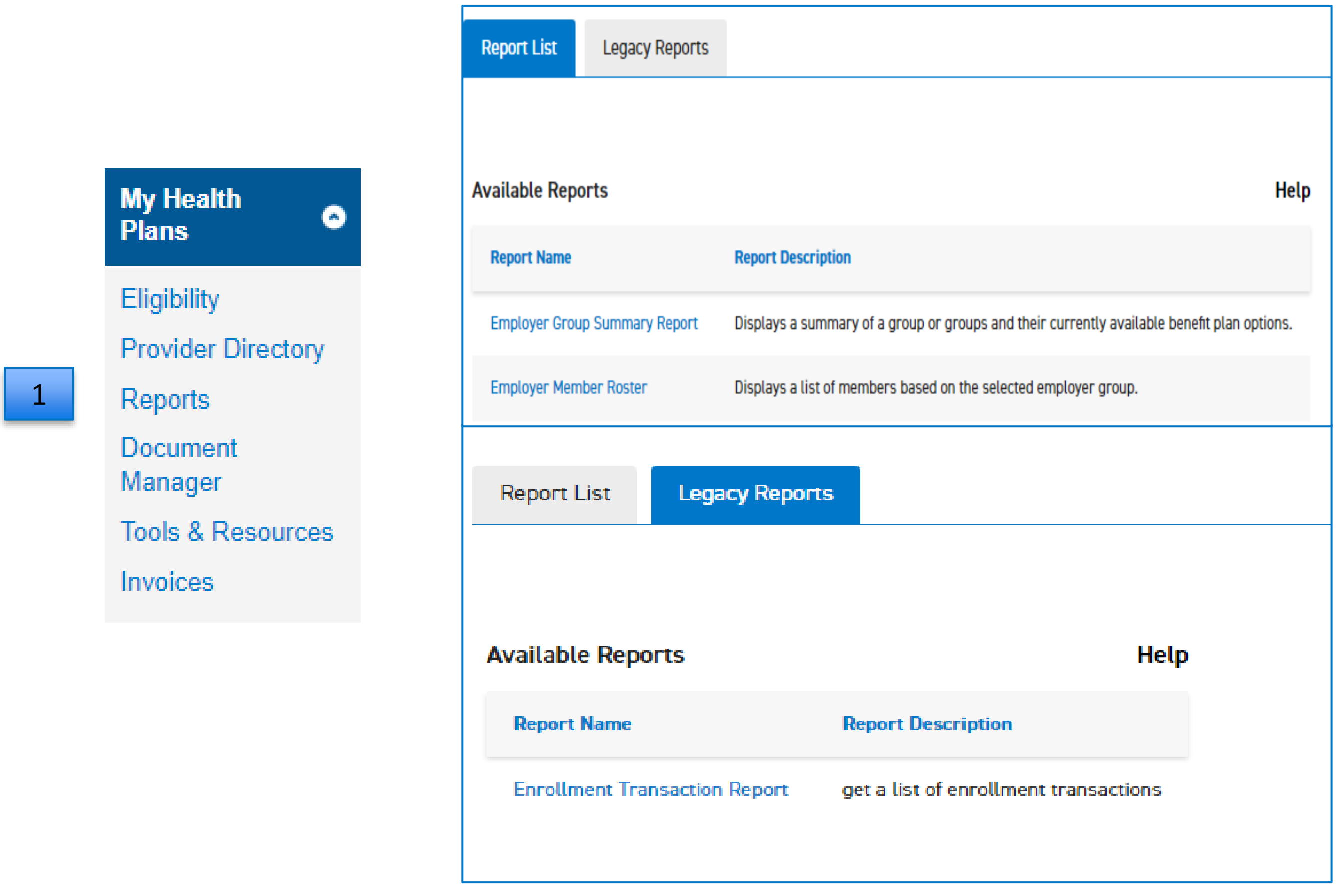
SECTION 9: MY HEALTH PLANS – PROVIDER DIRECTORY

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.



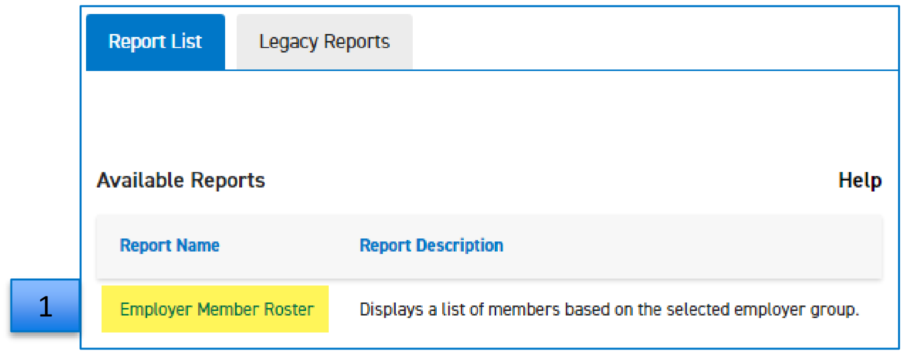
SECTION 9: MY HEALTH PLANS – REPORTS

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.



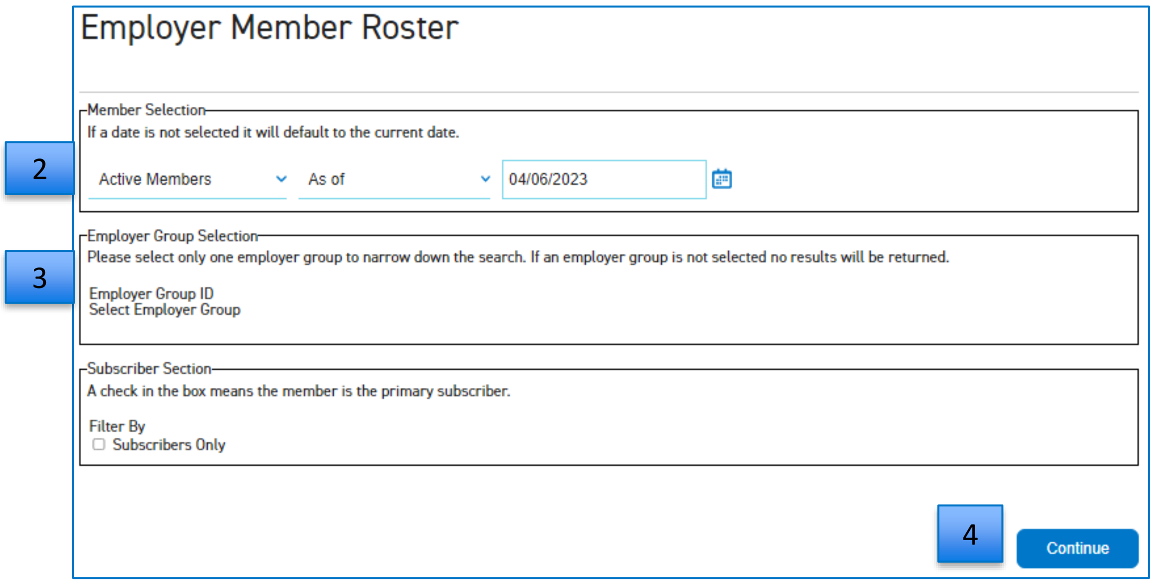
SECTION 9: MY HEALTH PLANS - REPORTS – EMPLOYER MEMBER ROSTER

1. Click on “Employer Member Roster.”



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



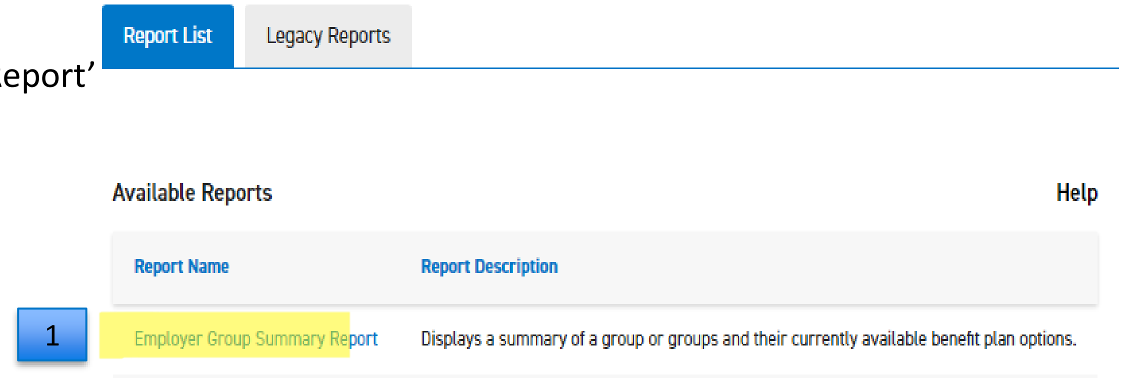
Search Employer Groups Refine your search results by indicating only a division number under *Group ID*; this will bring up only the division you are looking for. OR to run the report by group number, add the first 4 digits of the group name under *Name.*

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

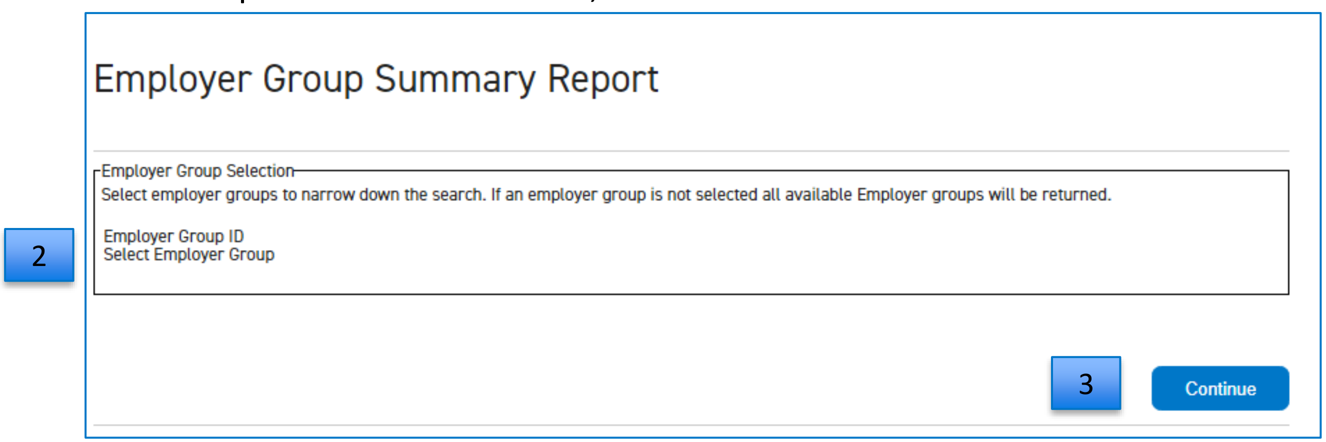
5. You can download the report in .pdf or a .csv (Excel).

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

1. Click on 'Employer Group Summary Report'



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



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.

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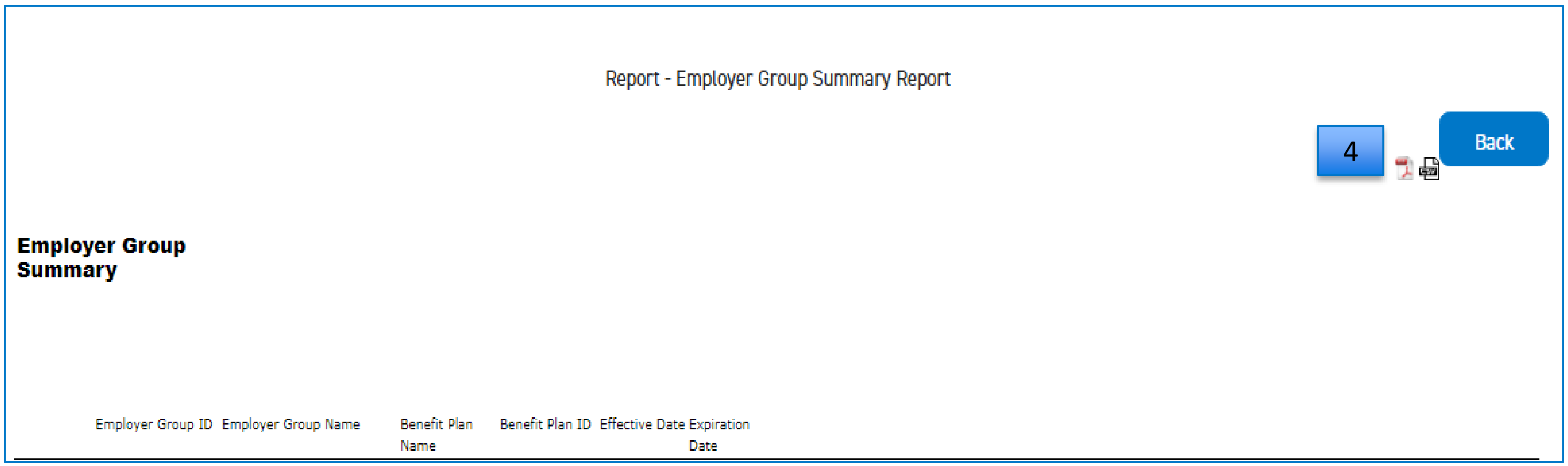
SECTION 9: MY HEALTH PLANS – REPORTS - EMPLOYER GROUP SUMMARY (CONT.)

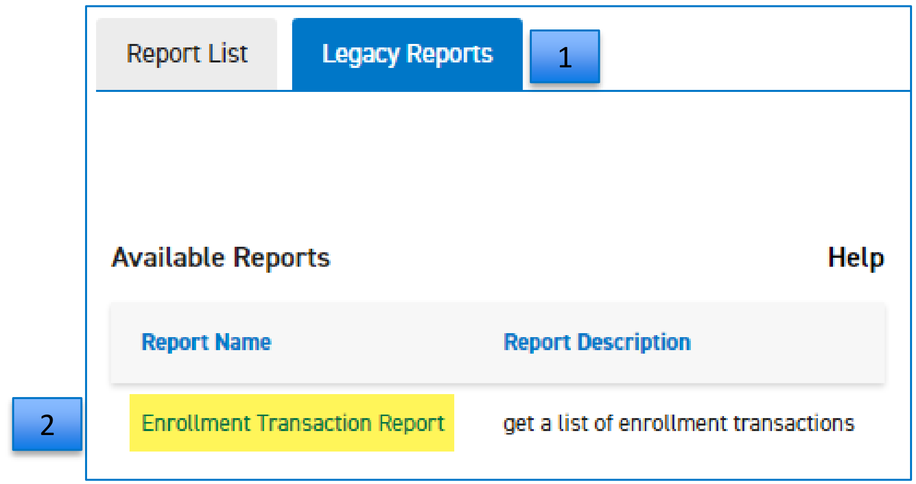
4. The Employer Group Summary Report is available to be downloaded in either PDF or CSV format.



SECTION 9 MY HEALTH PLAN - REPORTS – ENROLLMENT TRANSACTION REPORT

1. Click on “Legacy Reports”

2. Click on “Enrollment Transaction Report”



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

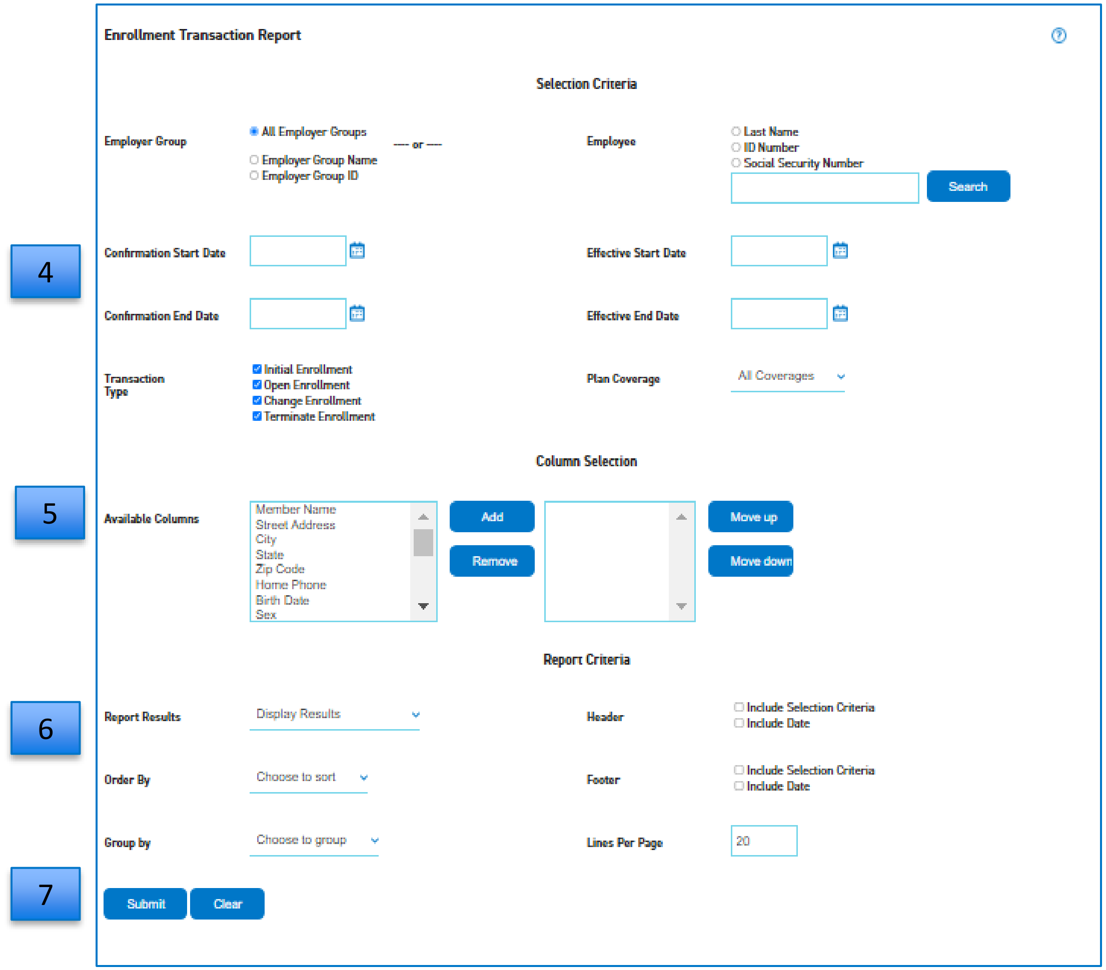
3. Use the “Selection Criteria” to set your own filters. Set your search filters under “**Search Criteria**”, “**Colum Selection”** and “**Report Criteria”**

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



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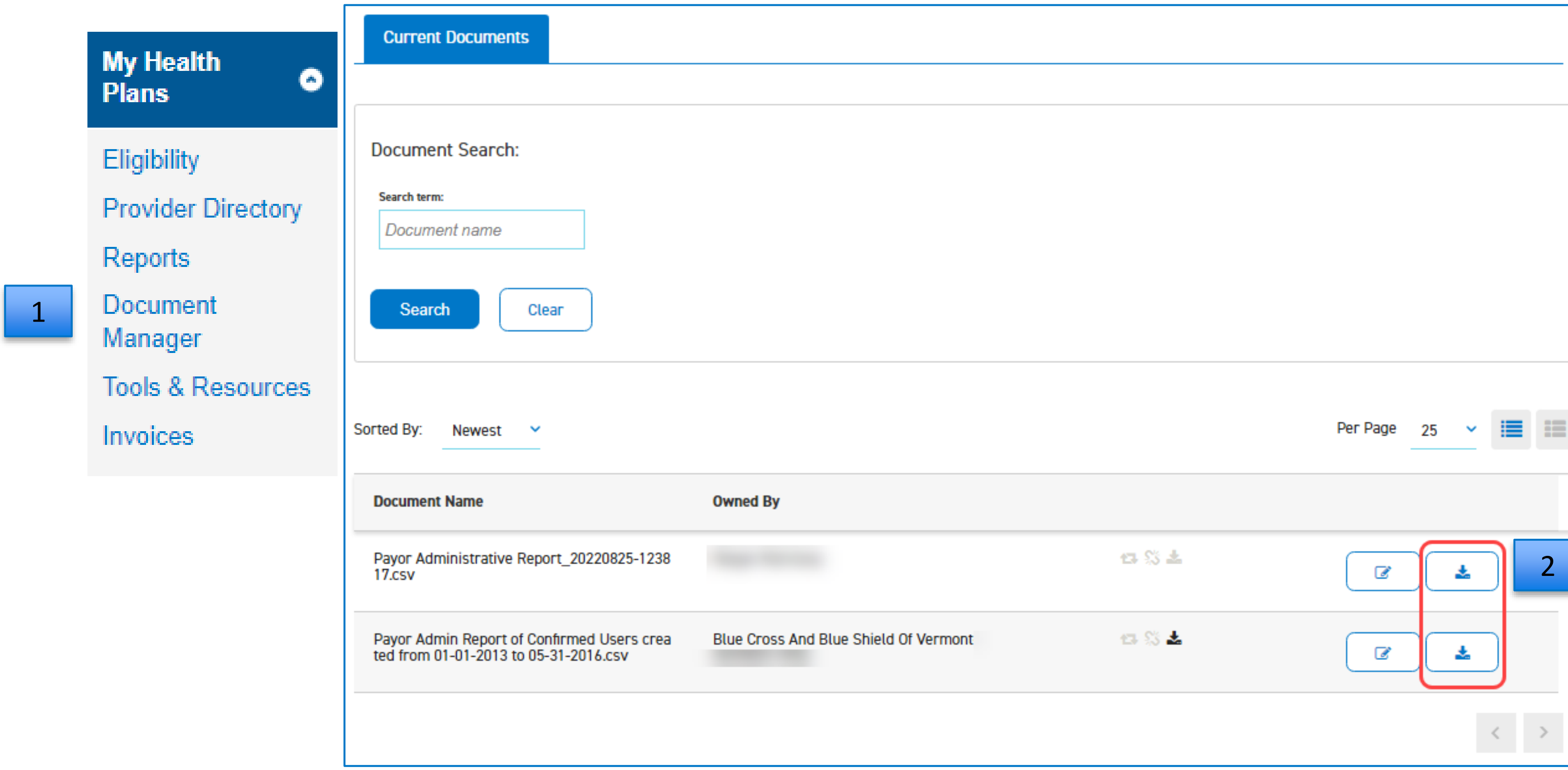
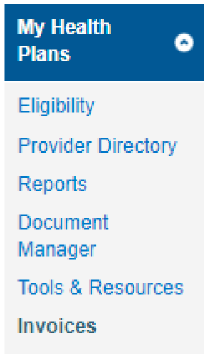
SECTION 9: MY HEALTH PLANS - DOCUMENT MANAGER

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



SECTION 9: MY HEALTH PLANS – INVOICES

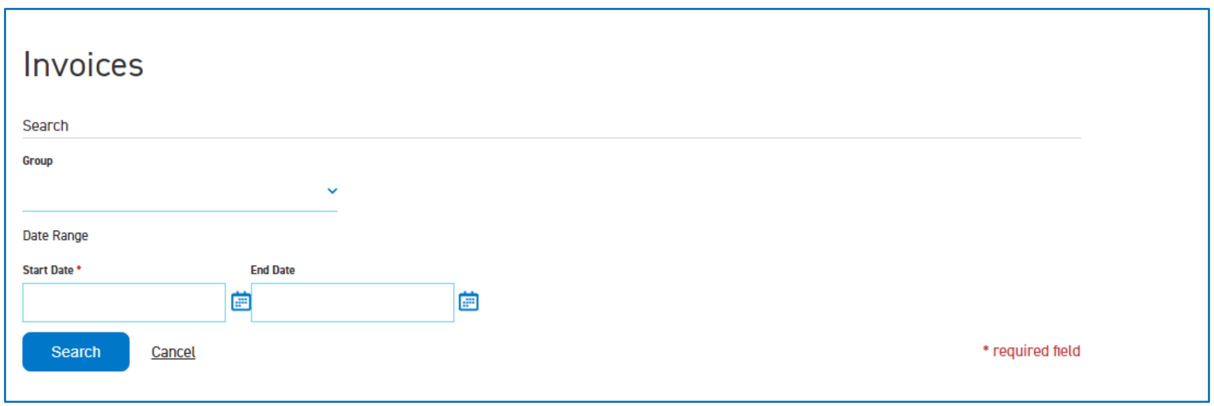


1

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.



2

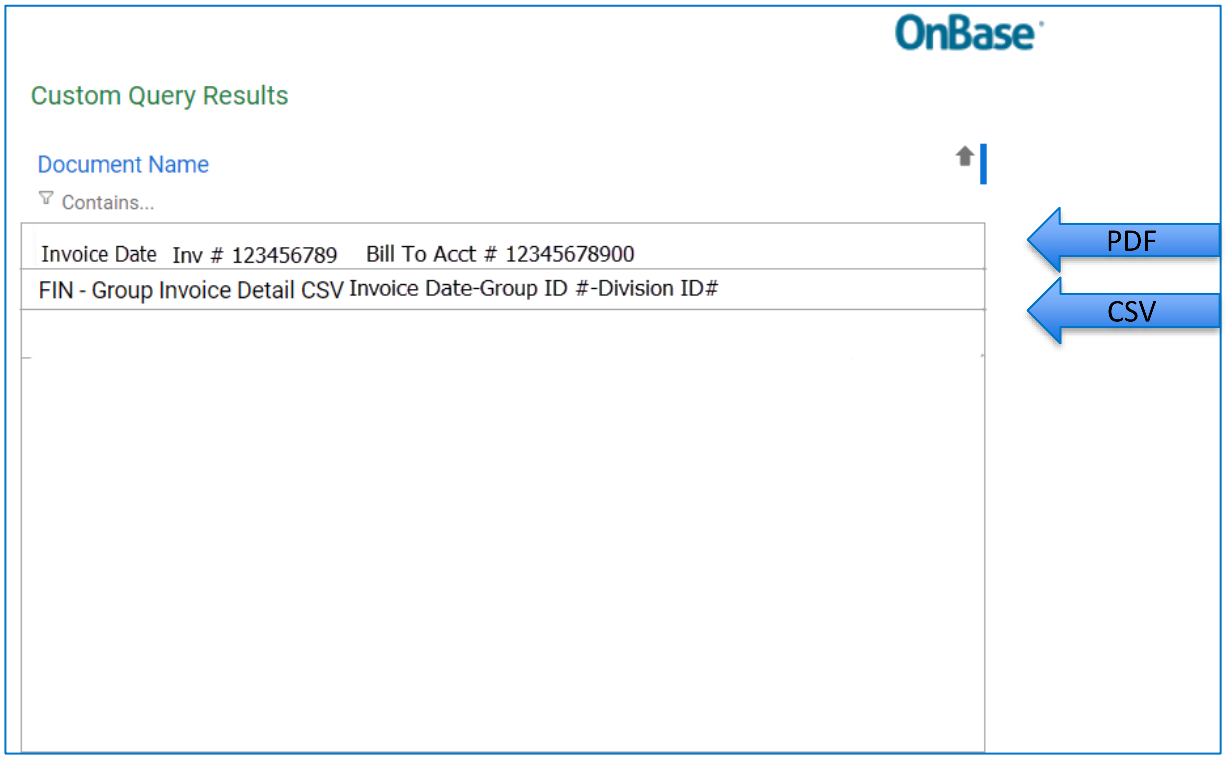
SECTION 9: MY HEALTH PLANS – INVOICES

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



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?

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