Enrollment Guide for Commercial Groups Managed in Agent Portal

This guide explains how to access key enrollment features in the 24/7 self-service Scott and White Health Plan and FirstCare Health Plans Agent portals. Links to both portals and general user guides are:

myScott&White Self-Service Agent Portal
Scott and White Health Plan Agent Portal User Guide

myFirstCare Self Service Agent Portal
FirstCare Agent Portal User Guide

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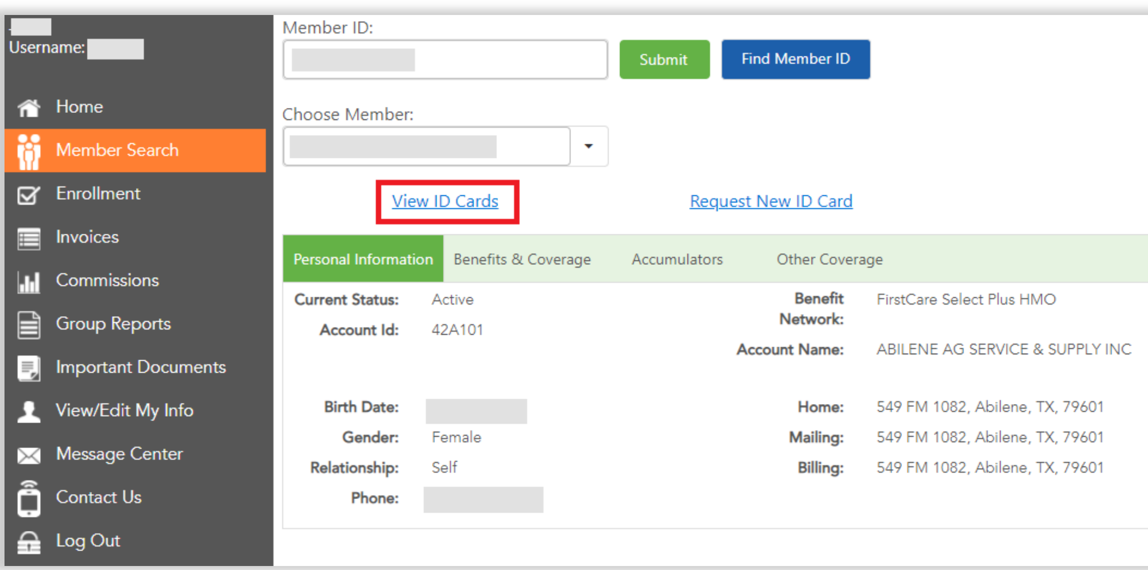
1. Member ID Cards

To access Member ID Cards, log in to the portal of your choice and select **Member Search** in the left navigation.

- Enter the member ID and click **Submit,** or
- Select **Find Member ID** to search by First Name, Last Name, Date of Birth or Account ID
- Click **View ID Cards**

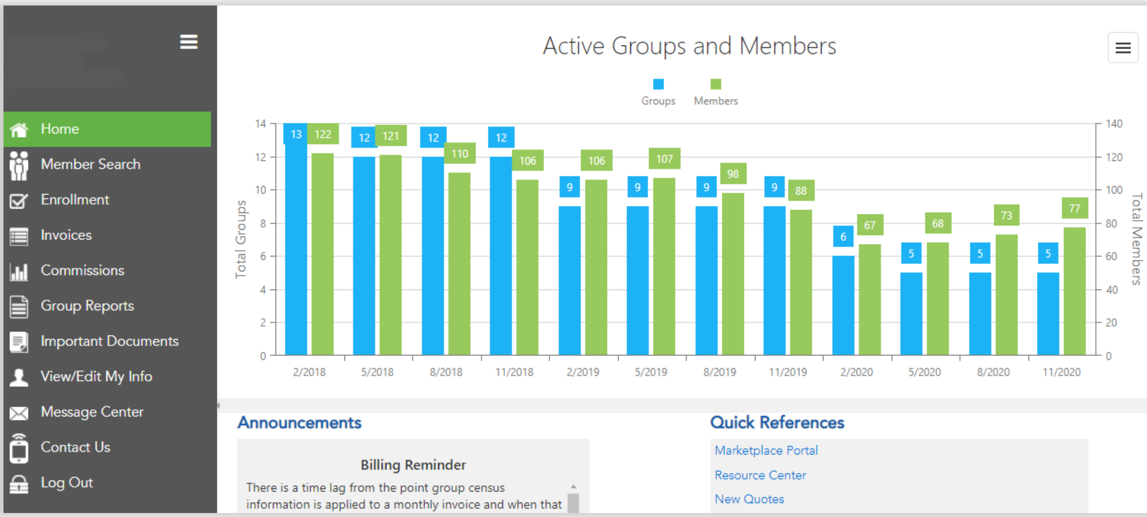


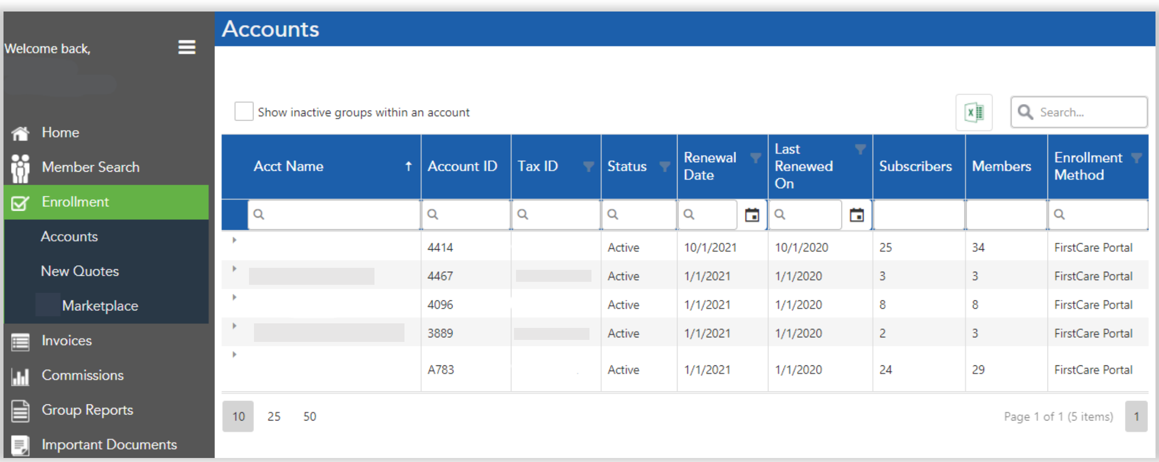
You can also view Member ID Cards from the **Enrollment** section of the portal.

- From **Enrollment > Accounts** in the left navigation
- Select the Client Account to view **Account Details – Enrollment**
- Scroll to the **Manage Membership** grid, then select the **Subscriber ID**
- Click **View ID Cards**

2. Online Enrollment

To access Online Enrollment, log in to the portal of your choice and select **Enrollment,** then **Accounts** in the left navigation. Search or sort your client accounts by Account Name, Account ID, Tax ID, Status, Renewal Date, Last Renewed On and Enrollment Method.

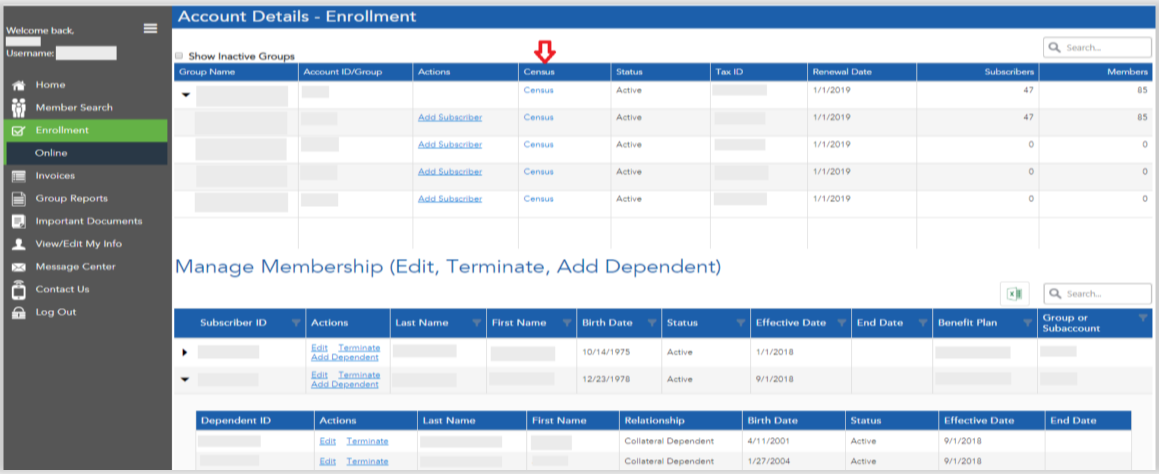




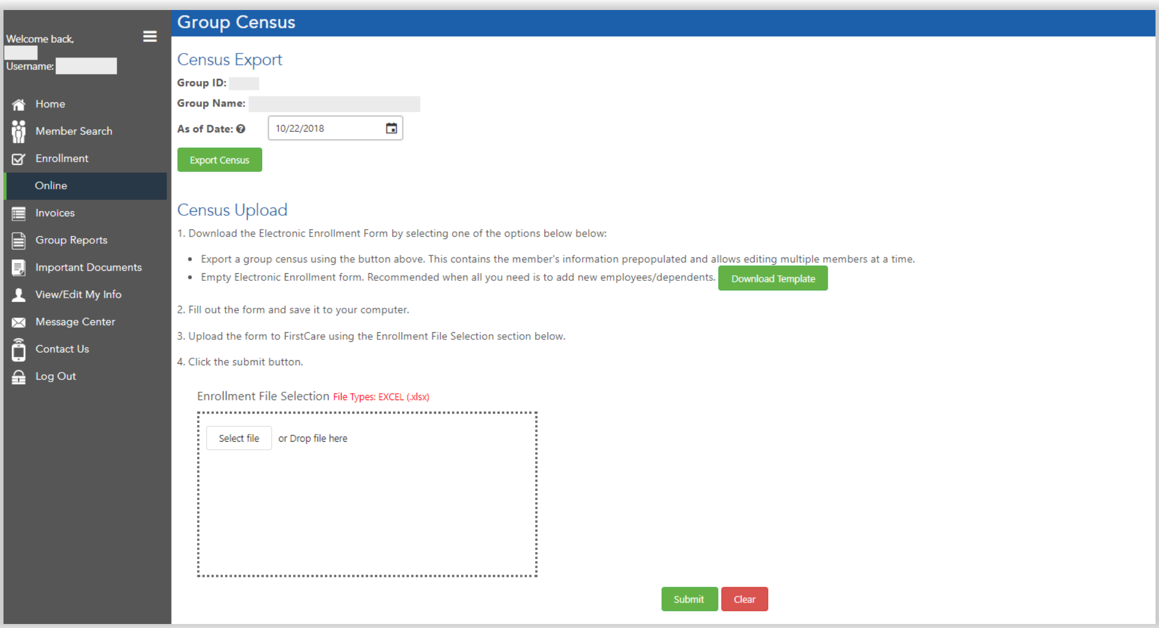
3. Enrollment via Census - Export, Edit and Upload

a. From **Enrollment** > **Accounts** in the left navigation, select the Client Account to view **Account Details – Enrollment**.

b. Click **Census** to view the **Group Census** page.



c. Next, choose **Export Census** (by date) or **Download Template** for a blank Census template.



d. Review all tabs in the Census spreadsheet.

Instructions Tab: Includes details on all required fields and formatting. **To expedite processing, add a Contact Name, Phone Number, Email and Group Name to the form at the bottom of the Instructions tab.**

Examples Tab: Provides examples of information required for Enrolling Family Coverage, Enrolling Single Coverage, Adding a Dependent, Terminating Coverage, Adding COBRA Coverage and Address Change via Census Upload.

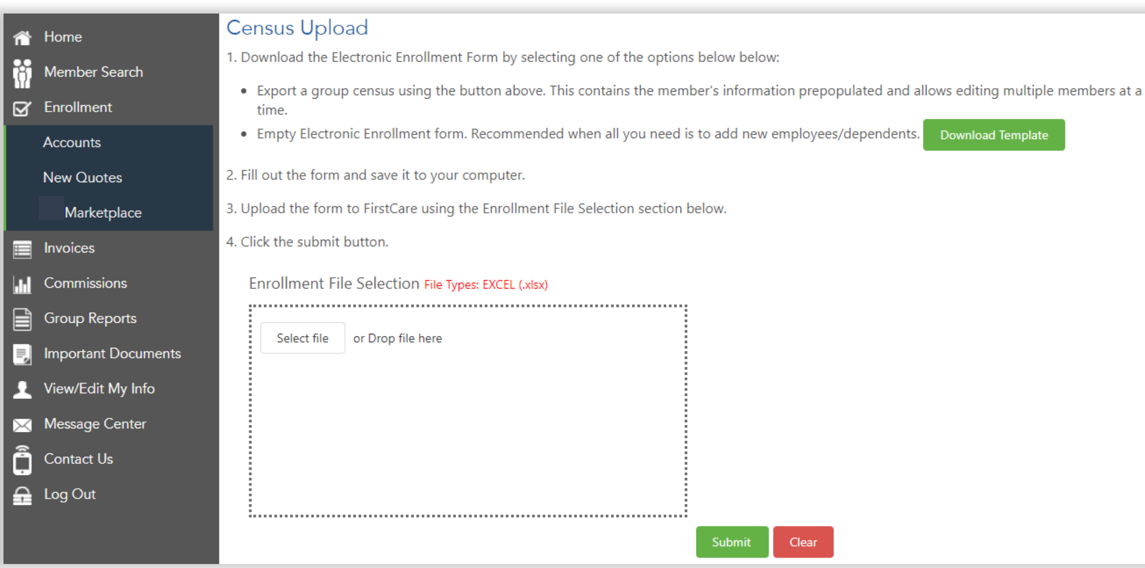
ACTION	COBRA	EMP SUBSCRIPTION ID	EMP SSN	MEMBER ID	DEP SSN	EMP/DEP LAST NAME	EMP/DEP FIRST NAME	EMP/DEP MIDDLE INITIAL	REL. CODE	GENDER	DOB	ACCOUNT ID	BENEFIT PLAN ID	EMP HIRE DATE	EFFECT. DATE OF COV
ENROLLING FAMILY COVERAGE:															
A	N		444556666		4.45E+08	DOE	JOHN	M	Self	M	19451015	SFA0010000	HEN14EPO_1(	20040901	20050101
A	N		444556666		3.33E+08	DOE	JANE		Spouse	F	19450523	SFA0010000	HEN14EPO_1(	20040901	20050101
A	N		444556666		2.23E+08	DOE	BRAD		Child	M	19980413	SFA0010000	HEN14EPO_1(	20040901	20050101
A	N		444556666		5.56E+08	DOE	SARAH		Child	F	20041216	SFA0010000	HEN14EPO_1(	20040901	20050101
ENROLLING SINGLE COVERAGE:															
A	N		111223333		1.11E+08	SMITH	JAMES		Self	M	19500805	SFP0010000	HEN14EPO_1(	20000101	20050101
ADDING A DEPENDENT:															
A	N		111223333		1.11E+08	SMITH	JAMES JR		Child	M	20180101	SFP0010000	HEN14EPO_1022		20180101
TERMING COVERAGE:															
T	N		111223333		1.11E+08	SMITH	JAMES		Self	M	19500805	SFP0010000	HEN14EPO_1(	20000101	20050101
ADDING COBRA COVERAGE:															
A	Y		444556666		4.45E+08	DOE	JANE		Spouse	F	19450523	SFCOBRA111	HEN14COB_1(	20060101	20060101
ADDRESS CHANGE:															
C	N		555117777		5.55E+08	JONES	SAM		Self	M	19650217	SFA0010000	HEN14EPO_1(	20030301	20050101

Instructions | Enrollment Form | **Examples**

<u>Enrollment Form Tab</u>: Complete the Enrollment Form using the instructions and examples provided.

- The Census spreadsheet allows one transaction (one row) per member. If you need to terminate coverage for a member and then add COBRA coverage, we recommend the following steps:
  - Perform the Termination in the Portal, then
  - Add that member back in on the Census with COBRA coverage.
  - **Helpful tip**: You can export the Census before termination, then change the member to COBRA in the Census spreadsheet. Click to save, then upload for processing.
- Do not overlook the **Action** and **COBRA** column entries.
- Any enrollment transactions that require documentation to be uploaded will need to be completed directly in the Portal. Examples: Adoption or Loss of Other Coverage.
- Make sure the file is saved in its **original .xlsx format**.

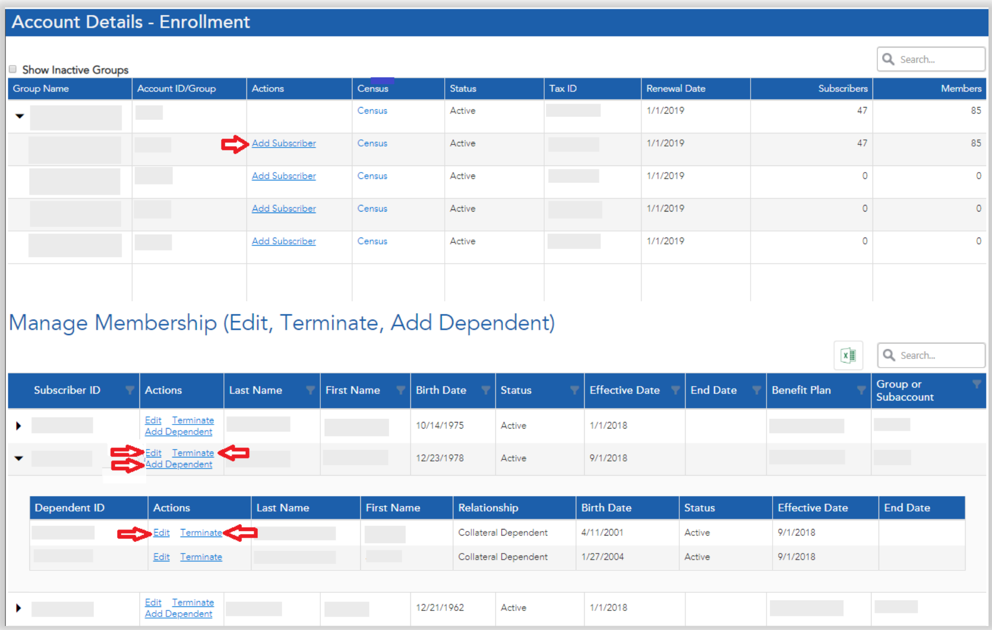
e. Follow the steps listed in the Portal to complete the **Census Upload**.



4. Adding New Single Subscribers and Dependents Via the Portal

a. From **Enrollment** > **Accounts** in the left navigation, select the Client Account to view **Account Details – Enrollment**

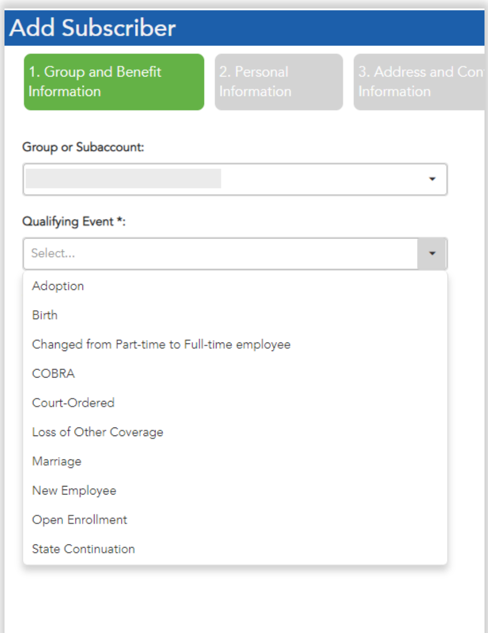
b. In **Account Details – Enrollment**, click the drop-down next to the group name to expand the list, select the sub-account, then click **Add Subscriber**. The group (or sub-account) information will be auto-filled but can be changed.

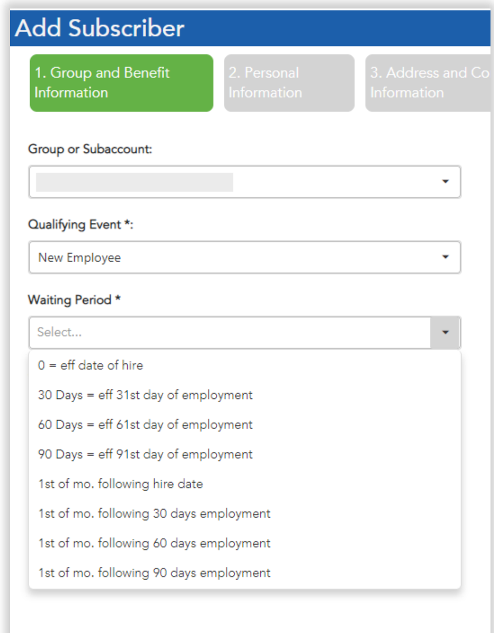


c. Select the Qualifying Event from the drop-down menu.

- Allowable **Qualifying Event** dates are pre-calculated. If you select an option that is out of range, you will receive an error message.

- For most Qualifying Events, the **Effective Date** is then calculated for you based on rules for the Qualifying Event and the date you selected.





d. Enter the member's personal information:
   - **Social Security Number (SSN):** Required for the Subscriber but not for Dependents.
   - **Address and Contact Information**: Email is not a required field, but please enter one to ensure the member receives our latest updates.
   - **Coordination of Benefits** page is all defaulted to "no." Change if needed.

e. **Verify Enrollment Data and Add Dependent(s)**:
   - Review and edit Subscriber data, then
   - **Add dependent(s),** if applicable by clicking the blue button. **For a New Employee qualifying event, add dependents here.** Details on adding dependents for existing employees during and outside of Open Enrollment are below.
   - When you select the option to **Add Dependent**, the dependent's information is pre-populated to match the subscriber.
   - After adding the dependent and verifying their data, you can edit the dependent or add another dependent repeatedly, until all dependents have been entered.

f. **Submit Enrollment**: You will receive a confirmation and the options to **Print** or **Return to the Account Details** page. **Please print your confirmation.**

Add Subscriber

Your Enrollment Submission was successful!
Transaction ID: 5823946865
Transaction Date: 10/22/2018
Please allow 1 to 2 business days to process your transaction. Please save your Transaction ID in the event that research has to be performed on your transaction.

Qualifying Event

Form Field	Value
Qualifying Event	New Employee
Qualifying Event Date	10/1/2018
Effective Date	11/30/2018

Group and Benefit Information

Form Field	Value
Account ID	
Group ID	
Group Name	
Benefit Plan	

Member Type:Subscriber

Form Field	New Value
First Name	Cindy
Middle Name	
Last Name	Smith
Suffix	
Birth Date	9/1/1985
Gender	F

5. Adding Dependents During Open Enrollment - Existing Members Only

a. **During Open Enrollment, a Dependent must be added by editing the Subscriber.** Select the **Edit** link next to the subscriber's name in the **Manage Membership** grid. Note: If you click the **Add Dependent** link in the **Manage Membership** grid, you will find that there is no "Open Enrollment" qualifying event.

b. Select **Qualify Event > Open Enrollment** from the drop-down

c. **Verify Enrollment Data and Add Dependent(s)**:
- Review and edit Subscriber data, then
- **Add dependent(s),** if applicable by clicking the blue button. When you select the option to **Add Dependent**, the dependent's information is pre-populated to match the Subscriber.
- After adding the dependent and verifying their data, you can edit the dependent or add another dependent until all dependents have been entered.

d. **Submit Enrollment**: You will receive a confirmation and the options to **Print** or **Return to the Account Details** page. **Please print your confirmation.**

6. Adding Dependents Outside of Open Enrollment - Existing Members Only

To add a dependent without making changes to the Subscriber (outside of Open Enrollment): click the **Add Dependent** link next to the Subscriber and proceed with the enrollment steps. The Group and Benefit information will be auto populated.

To make Subscriber changes and add a dependent: **Edit** the Subscriber and add the dependent as described in the Open Enrollment steps above.

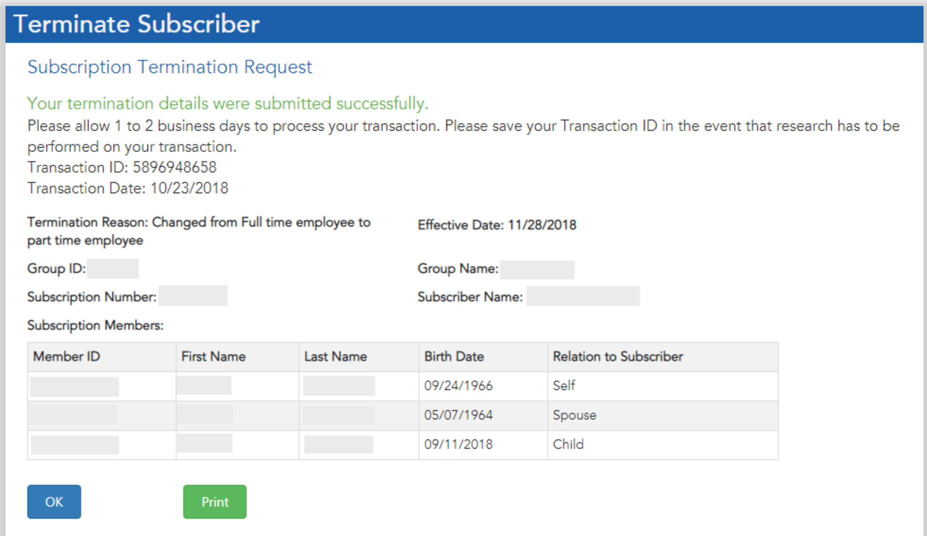
7. Address Changes, Etc.

a. You can edit a Subscriber or a Dependent by clicking the **Edit** link next to their name in the **Manage Membership** grid and following the enrollment process.
b. Select the **Change of Demographics** option as the qualifying event.

8. Member Termination

a. You can Terminate a Subscriber or Dependent by clicking the **Terminate** link next to their name.
   - Termination of a Subscriber results in termination of all Dependents as well.
   - A Dependent, however, may be individually terminated.

b. Complete the Subscription Termination Request. Note: The **Effective Date** field includes allowable dates. **Please contact the Enrollment Department for any variations.**



Terminate Subscriber

Subscription Termination Request

Your termination details were submitted successfully.

Please allow 1 to 2 business days to process your transaction. Please save your Transaction ID in the event that research has to be performed on your transaction.
Transaction ID: 5896948658
Transaction Date: 10/23/2018

Termination Reason: Changed from Full time employee to part time employee

Effective Date: 11/28/2018

Group ID:

Group Name:

Subscription Number:

Subscriber Name:

Subscription Members:

Member ID	First Name	Last Name	Birth Date	Relation to Subscriber
			09/24/1966	Self
			05/07/1964	Spouse
			09/11/2018	Child

OK   Print

c. Review the request and click **Continue** to confirm. **Please print your confirmation.**

Questions?

If you have any questions about Enrollment, please contact your Sales or Client Management representative.