



# **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

- Usernan	me:	Member ID:			Submit	Find Member ID	l
1111 ⊨	lome	Choose Member:					
<b>1</b>	Member Search			•			
Ø ₽	Enrollment	Vie	w ID Cards		Reques	t New ID Card	
📃 Ir	nvoices	Personal Information	on Benefits & Cov	erade	Accumulators	Other Covera	200
	Commissions			cruge	/ tecamatators		
	D	Current Status:	Active			Benefit Network:	FirstCare Select Plus HMO
	Group Reports	Account Id:	42A101			ccount Name:	ABILENE AG SERVICE & SUPPLY INC
≡, Ir	mportant Documents				, ,	ccount reame.	ADIELNE AG SERVICE & SOFT ET INC
👤 V	/iew/Edit My Info	Birth Date:				Home:	549 FM 1082, Abilene, TX, 79601
		Gender:	Female			Mailing:	549 FM 1082, Abilene, TX, 79601
× N	Message Center	Relationship:	Self			Billing:	549 FM 1082, Abilene, TX, 79601
Ô C	Contact Us	Phone:					
Ļι	.og Out						

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.



		Show inactive group	os within a	n account								xII Q :	Search
	Home Member Search	Acct Name	t	Account ID	Tax ID 🔻	Status 🔻	Renewal Date	¥	Last Renewed On	T	Subscribers	Members	Enrollment Method
3	Enrollment	Q		Q	Q	Q	Q		Q				Q
	Accounts	>		4414		Active	10/1/2021	_	10/1/2020		25	34	FirstCare Portal
	New Quotes	•		4467		Active	1/1/2021		1/1/2020		3	3	FirstCare Portal
	Marketplace	)		4096		Active	1/1/2021		1/1/2020		8	8	FirstCare Porta
-	Invoices	•		3889		Active	1/1/2021		1/1/2020		2	3	FirstCare Porta
	Commissions	<b>→</b>		A783		Active	1/1/2021		1/1/2020		24	29	FirstCare Porta

#### 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.

icome back,	Show Inactive Gro	oups		1 U						Q Search
	Group Name	Account ID/Group	Actions	Census	Status	Tax ID	Renewal D	Date	Subscriben	i Membe
Home Member Search	-			Census	Active		1/1/2019		47	· · · · · · · · · · · · · · · · · · ·
Member Search			Add Subscriber	Census	Active		1/1/2019		47	
Enrollment			Add Subscriber	Census	Active		1/1/2019		c	
Online			Add Subjeriber	Census	Active		1/1/2019			
			Add Subscriber	Census	Active		1/1/2019		c	
Group Reports			Add Subscriber	Census	Active		1/1/2019		c	
Message Center	Manage M	1embership	(Edit, Terr	ninate, Ad	d Depend	ent)				
Message Center Contact Us	Manage M	1embership	(Edit, Terr	minate, Ad	d Depend	ent)				Q Search
	Manage M Subscriber ID	1embership	(Edit, Terr		d Depend		fective Date 🔻	End Date	Eenefit Plan	C Search Group or Subaccount
				First Name 🛛 🔻		us 🔻 Ef	fective Date 🛛 🔻	End Date		Group or
	Subscriber ID	Actions Edit Terminate		First Name 🔻	Birth Date 🔻 Sta	rus 🔻 Ef		End Date		Group or Subaccount
	Subscriber ID	Actions     Edit Terminate     Add Decendent     Edit Terminate		First Name 🔻	Birth Date 💎 Sta 10/14/1975 Acti 12/23/1978 Acti	us ▼ Ef re 1/ re 9/	1/2018 1/2018	End Date		Group or Subaccount
	Subscriber ID	Actions     Edit Terminate     Add Decendent     Edit Terminate     Add Decendent	Last Name 🔻	First Name 🛛 🔻	Birth Date 💎 Sta 10/14/1975 Acti 12/23/1978 Acti	re Dirte	1/2018 1/2018 h Date S		Benefit Plan	Group or Subaccount

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

14/-1	rome back.	Group Census
	ome back, 🔤	Census Export
UBEI		Group ID:
ĥ	Home	Group Name:
Ö	Member Search	As of Date:  10/22/2018
Ø	Enrollment	Export Cersus
	Online	
		Census Upload
	Group Reports	1. Download the Electronic Enrollment Form by selecting one of the options below below:
	Important Documents	Export a group census using the button above. This contains the member's information prepopulated and allows editing multiple members at a time.     Empty Electronic Enrollment form. Recommended when all you need is to add new employees/dependents.     Countoad Template
11	View/Edit My Info	
$\mathbf{x}$	Message Center	2. Fill out the form and save it to your computer.
Ô	Contact Us	3. Upload the form to FirstCare using the Enrollment File Selection section below.
6	Log Out	4. Click the submit button.
		Enrollment File Selection File Type: EXCEL (xlx)
		Select file or Drop file here
		Submit Clear

d. Review all tabs in the Census spreadsheet.

<u>Instructions Tab</u>: 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.

	]	EMP SUBSCRIPTION		MEMBER		EMP/DEP LAST	EMP/DEP FIRST	EMP/DEP MIDDLE	REL.				BENEFIT		EFFECT. DATE OF
ACTION	COBRA	ID	EMP SSN		DEP SSN	NAME	NAME	INITIAL	KEL.	GENDER	DOB	ACCOUNT ID			COV
		COVERAGE:	EIVIF 33IN		DEF 33N	INAME	INAIVIE	INTIAL	CODE	GENDER	DOB	ACCOUNTID	FLANID	DATE	cov
A	N		44455666	56	4.45E+08	DOF	JOHN	м	Self	м	19451015	SFA0010000	HEN14EPO 1	(20040901	2005010
A	N		44455666		3.33E+08		JANE		Spouse	F		SFA0010000			
A	N		44455666		2.23E+08		BRAD		Child	M		SFA0010000			
A	N		44455666		5.56E+08		SARAH		Child	F		SFA0010000	_		
ENROLLI	NG SINGL	E COVERAGE:													
A	Ν		11122333	33	1.11E+08	SMITH	JAMES		Self	М	19500805	SFP0010000	HEN14EPO_1	1 20000101	2005010
ADDING		ENT:													
A	N		11122333	33	1.11E+08	SMITH	JAMES JR		Child	М	20180101	SFP0010000	HEN14EPO_1	1022	2018010
TERMING	COVERA	SE:													
т	N		11122333	33	1.11E+08	SMITH	JAMES		Self	М	19500805	SFP0010000	HEN14EPO_1	1 20000101	2005010
ADDING	COBRA CO	VERAGE:													
A	Y		44455666	56	4.45E+08	DOE	JANE		Spouse	F	19450523	SFCOBRA111	HEN14COB_	20060101	2006010
ADDRES		:													
С	Ν		55511777	71	5.55E+08	JONES	SAM		Self	М	19650217	SFA0010000	HEN14EPO_1	1 20030301	1 2005010
	Instructions	Enrollment Form	Examples	+								•			1

**Enrollment Form Tab:** 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:
  - $\circ$  Perform the Termination in the Portal, then
  - $\circ$   $\;$  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**.

-		
ŕ	Home	Census Upload
	Member Search	1. Download the Electronic Enrollment Form by selecting one of the options below below:
	Enrollment	• Export a group census using the button above. This contains the member's information prepopulated and allows editing multiple members at a
		time.  • Empty Electronic Enrollment form. Recommended when all you need is to add new employees/dependents.  Download Template
	Accounts	
	New Quotes	2. Fill out the form and save it to your computer.
	Marketplace	3. Upload the form to FirstCare using the Enrollment File Selection section below.
	Invoices	4. Click the submit button.
la i	Commissions	Enrollment File Selection File Types: EXCEL (xlsx)
	Group Reports	Select file or Drop file here
	Important Documents	Select life of Drop life here
1	View/Edit My Info	
$\times$	Message Center	
Ô	Contact Us	
Ĥ	Log Out	
		Submit

# 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.

dd Subscriber			Add Subscriber		
		3. Address and Con Information	1. Group and Benefit Information	2. Personal Information	3. Address and 0 Information
Group or Subaccount:			Group or Subaccount:		
		-			•
lualifying Event *:			Qualifying Event *:		
Select		~	New Employee		•
Adoption			Waiting Period *		
Birth					
Changed from Part-time to Full-time	e employee		Select		·
COBRA			0 = eff date of hire		
Court-Ordered			30 Days = eff 31st day of em	ployment	
Loss of Other Coverage			60 Days = eff 61st day of em	ployment	
Varriage			90 Days = eff 91st day of em	ployment	
New Employee			1st of mo. following hire dat	e	
Open Enrollment			1st of mo. following 30 days	employment	
State Continuation			1st of mo. following 60 days	employment	
			1st of mo. following 90 days	anan launa ant	

- 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 Submissio Transaction ID: 5823946865	on was successful!		
Transaction D: 5625946665 Transaction Date: 10/22/2018	R		
Please allow 1 to 2 business of	-	ransaction. Please	save your Transactic
Qualifying Event			
Form Field		Value	
Qualifying Event		New Employee	
Qualifying Event Date		10/1/2018	
Effective Date		11/30/2018	
Group and Benefit Inform	nation		
Form Field	Value		
Account ID			
Group ID			
Group Name			
Benefit Plan			
Member Type:Subscriber	r		
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 Reaso part time employe	on: Changed from Full tir ee	me employee to	Effective Date: 11/2	8/2018							
Group ID:			Group Name:								
Subscription Num	ber:		Subscriber Name:								
Subscription Mem	bers:										
Member ID	First Name	Last Name	Birth Date	Relation to Subscriber							
			09/24/1966	Self							
			05/07/1964	Spouse							
			09/11/2018	Child							
ОК	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.