



Employer Enrollment Tool

Small Group Renewal

Last updated May 2024



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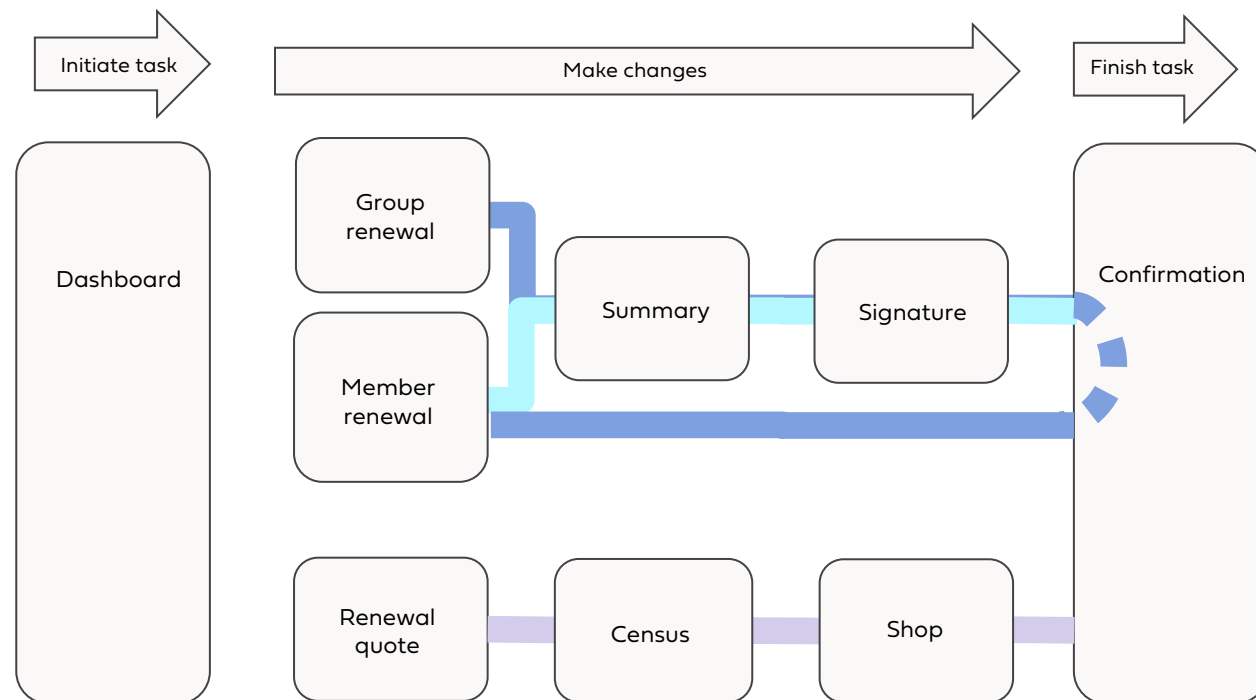
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Visit the Employer Enrollment Tool resource page on blueshieldca.com/broker to access additional tool resources, training videos, and enrollment guidelines.

Employer Enrollment Tool Renewals consists of three main task areas for brokers to manage their client renewals.

1. Creating quotes for existing customers
2. Submitting changes to group-level/contract level coverage offerings
3. Submitting changes to member coverage and plan elections



Renewal capabilities in Employer Enrollment Tool

Both Employer Enrollment Tool Renewal and Maintenance provide a robust suite of features to process renewal changes for your clients.

Feature	SGOR	Employer Enrollment tool
Renewal Book of Business	✓	✓
Real time group data and subscriber roster		✓
Guided Flow		✓
Transaction Summary		✓
Transaction Confirmation #	✓	✓
Transaction Log		✓
Submission Reports	✓	✓
Email Renewal changes	✓	✓
Resume Renewal Check out*	✓	

Feature	SGOR	EET - Renewals	EET - Maintenance
Generate group quotes	✓	✓	Not applicable
Add a class		✓	✓
Add plans	✓	✓	✓
Cancel plans	✓	✓	✓
Update Rider Options		✓	✓
Update Waiting Period at class plan level		✓	✓
Update Employer Contribution		✓	✓
Update Part-time coverage			✓

Feature	SGOR	EET - Renewals	EET - Maintenance
Enroll new employees			✓
Enroll COBRA members			✓
Update existing member plans	✓	✓	✓
Add new dependents			✓
Reinstate members			✓
Cancel members		✓	✓
Update existing members details			✓
Update Member PCP			

Preparing for launch and tool cutover

Starting July 11, 2024, brokers will process their Small Group client group and member renewal changes via Employer Enrollment Tool Renewal.

SMALL BUSINESS RENEWAL DASHBOARD

Introducing paperless renewals - the way to review and compare renewal options, and conveniently submit renewal changes.

Select the business name to get started.

Renewal Months: Feb2024, Mar2024, Apr2024, **May2024**, Jun2024, Jul2024, Aug2024, Sep2024

Total Groups: 340

Business Name * A-Z	Members	Current Premium	New Premium	Renewal Date
	7	\$2,575.45	\$2,940.06	5/1
	4	\$3,087.45	\$3,425.88	5/1
	4	\$3,438.24	\$3,740.02	5/1
	5	\$5,269.61	\$5,987.56	5/1
	4	\$3,747.53	\$4,256.67	5/1
	3	\$1,250.44	\$1,493.91	5/1

Maintenance vs. Renewal

- When a group is in a renewal period you can submit changes as Maintenance or Renewal
- Maintenance changes use the features already available in EET with the "Open Enrollment" qualifying event
- Renewal changes use the newly launched features to create a single submission of multiple group and member changes in one transaction

Access

- Only brokers will have access to the EET Renewal features
- Your clients can submit changes during their renewal period as Maintenance using the "Open Enrollment" qualifying event

Renewal packets and information

- No changes to how we send you and your clients renewal information
- Click on Access Shield Renewals button to view or download renewal packets

Preparing for launch and tool cutover

Transitioning from the Small Group Online Renewal tool (SGOR) to Employer Enrollment Tool Renewal (EET) starting with 10/1 renewals.

Tool transition timeline by renewal month						
Group renewal month	6/1 renewal	7/1 renewal	8/1 renewal	9/1 renewal	10/1 renewal	11/1 renewal
Submit changes via - Small Group Renewal tool	X	X	X	X		
Submit changes via - Employer Enrollment Tool Renewal					X	X

July

- July, August, September renewals in SGOR
- October renewals in EET

August

- August, September renewals in SGOR
- October, November renewals in EET

September

- September renewals in SGOR
- October, November, December renewals in EET

October

- October, November, December, January renewals in EET

November+

- November, December, January renewals in EET

Enrollment eligibility rules for renewal

Who can renew?

A group with an existing Blue Shield group health service contract is eligible for guaranteed renewal if :

- It is a group of one or more common-law employees;
- It has made all required premium payments;
- Neither it nor its employees or dependents have committed fraud or misrepresentation;
- It maintains the required 51% of its employees (full-time and full-time equivalent) in California;
- It continues to meet participation and contribution requirements; and
- It has otherwise maintained small group eligibility

Read the [Underwriting Guidelines](#) for all enrollment eligibility rules

Key renewal eligibility dates to know



Renewals are available 120 days before the anniversary date



Renewal changes are accepted until the last day of the renewal month

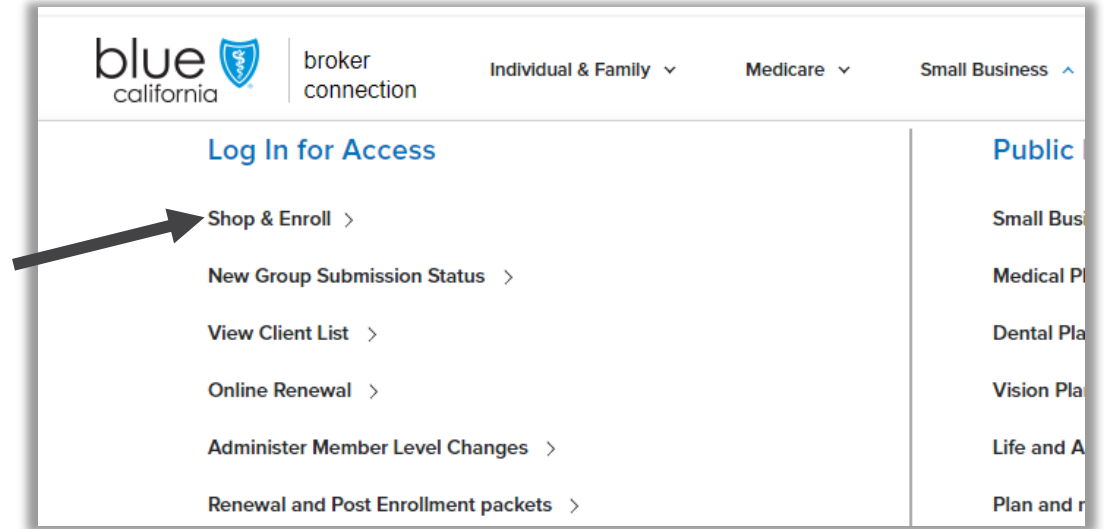
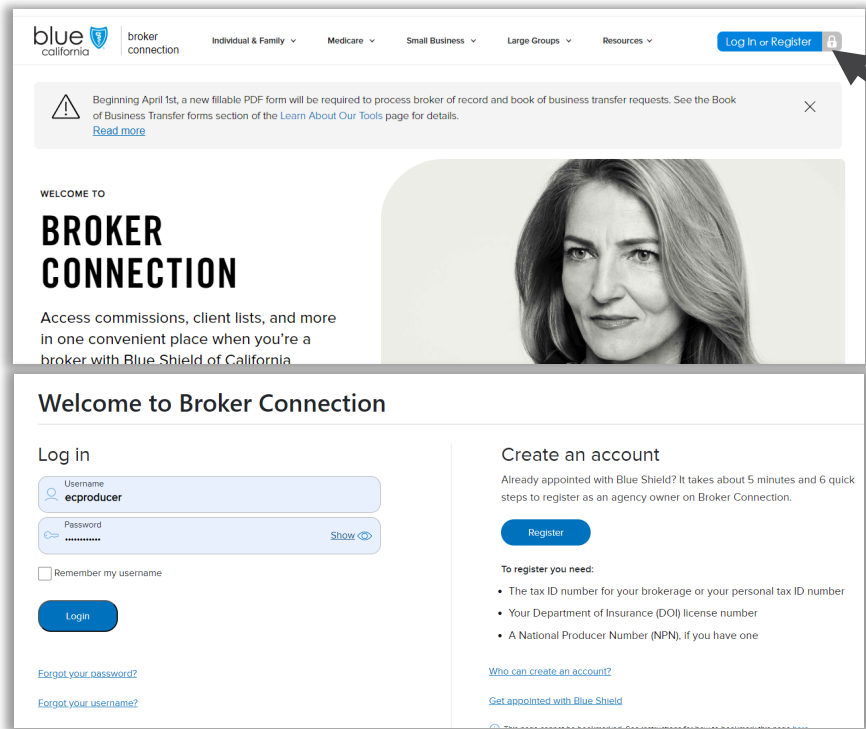


If no action is taken or changes submitted, Blue Shield will assume consent and the group will be automatically renewed into the plans suggested in their renewal notice



Active members whose plan is canceled have 60 days to enroll in a new plan or coverage will be terminated

Navigate to Employer Enrollment Tool



Step 1. Log into Broker Connection

- Use the links on the log in page to reset your password

Step 2. Click on the Shop & Enroll option

- The link will route you to the Employer Enrollment Tool

Navigate to renewals

Similar to new group enrollments, renewals are only accessible through the quick action button on the tool homepage.

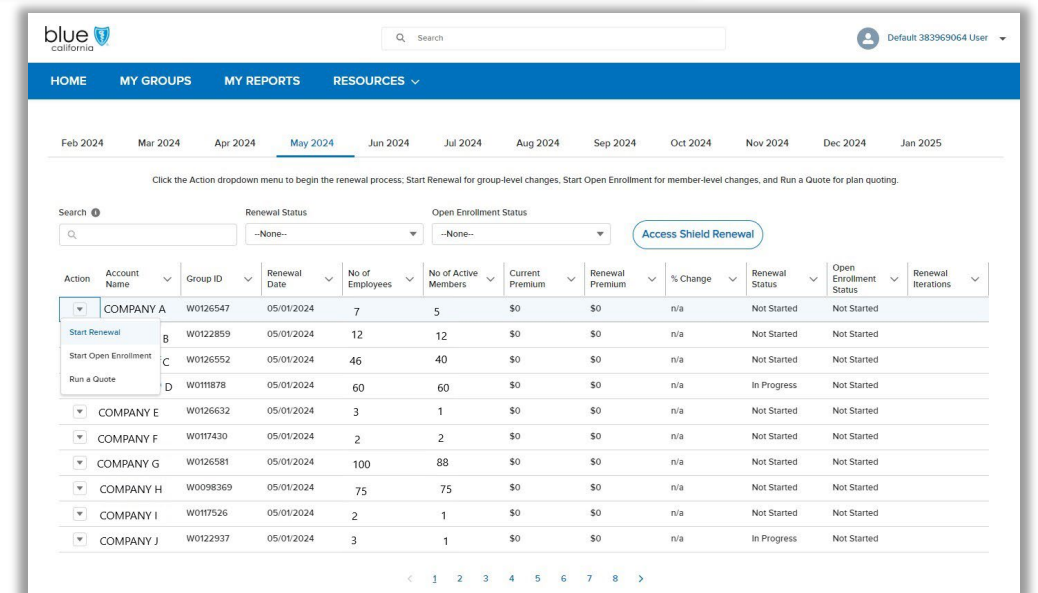
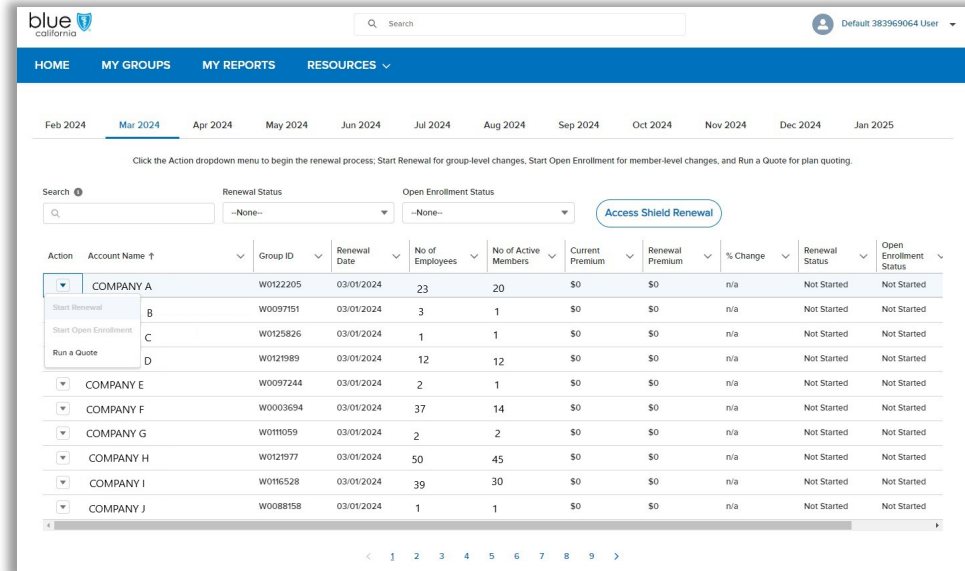
Click on Renewal a Small Group to access the renewal dashboard and make renewal changes

The screenshot shows the Blue Shield of California EET Renewals dashboard. At the top left is the 'blue california' logo. A search bar is located at the top right, next to a user profile icon labeled 'Default 383969064 User'. Below the header is a navigation menu with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. A light blue banner contains the text: 'October renewals are available for processing. Use SGOR for July - September renewal processing. Accessing Shield Renewal will require additional login at that site. Check out your renewal resources and training recordings on the Employer Enrollment Tool resource page.' Below the banner is a large image of four business professionals sitting together, with the text 'Welcome Default 383969064 User!' overlaid on the right. Underneath the image is a row of six buttons: 'New Enrollment', 'View Small Group Enrollments', 'Quote a Small Group', 'View Small Group Quotes', 'Manage All Groups', and 'Renew a Small Group'. At the bottom, there are two main sections: 'Enrollment Progress' and 'To Do'. The 'Enrollment Progress' section has three sub-sections: 'Not yet started', 'In Progress, not submitted', and 'Submitted, requires broker action'. The 'To Do' section has a 'View More' link.

Navigate the dashboard

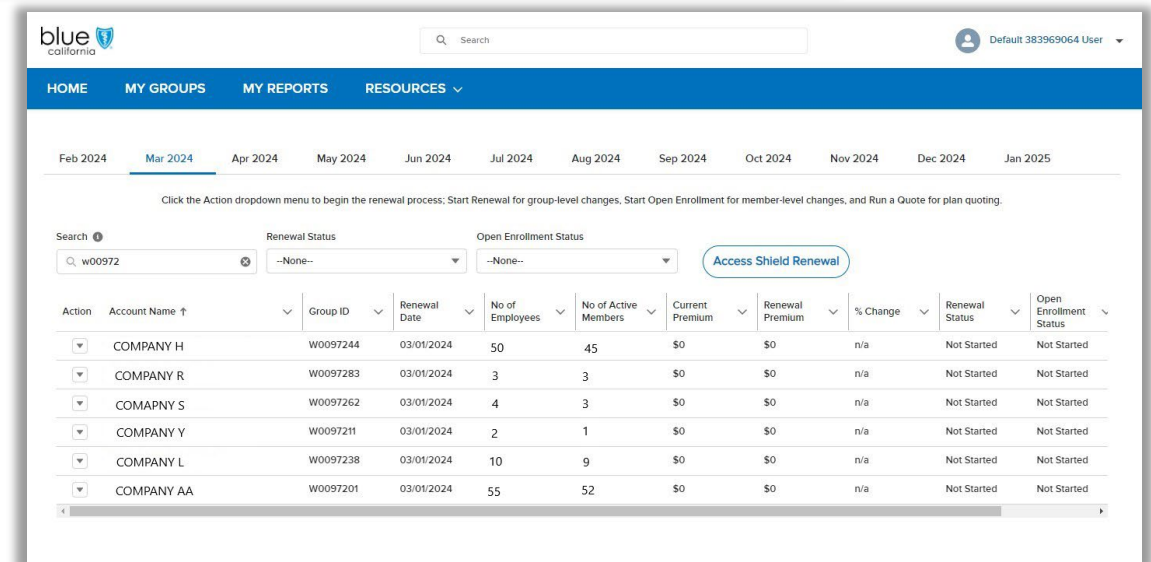
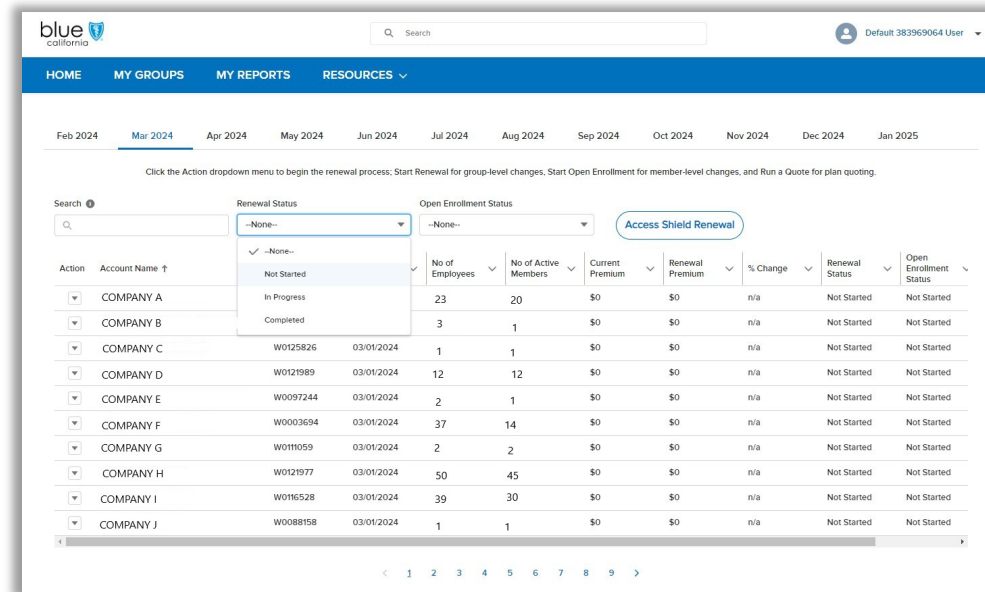
The renewal dashboard is your hub for all things renewal for your agency book of business.

- You will see all groups across the dashboard tabs but only active renewal months will have the ability to make changes
- Groups are listed in alphabetical order under each renewal month tab
- 10 groups are listed in the table. Months with more than 10 groups have pages available to click through the full list
- Access Shield Renewals button will route you to the renewal notices and information sent to your clients.
 - Single-sign-on is not available through EET so you will have to sign on to access this information



Navigate the dashboard

- Search is enabled on the dashboard to quickly find a group by the name or group number
- Filter the dashboard table to see which renewal submissions are not started, are submitting and processing with Blue Shield, or complete
- Sort the dashboard table by account name,



Running a renewal quote

Navigate to renewal quotes

On the renewal dashboard, select Run a Quote from the Action menu

Quote tips

- Quotes are not required to make plan or product changes
- The census upload is compatible with the major quote engine census templates
- Medical and Specialty products will download as separate CSV files
- Completed quotes can not be edited. Create a new quote if information is changing

blue shield of california

HOME MY GROUPS MY REPORTS RESOURCES

Feb 2024 Mar 2024 Apr 2024 **May 2024** Jun 2024 Jul 2024 Aug 2024 Sep 2024 Oct 2024 Nov 2024 Dec 2024 Jan 2025

Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.

Search Renewal Status Open Enrollment Status

Access Shield Renewal

Action	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
Start Renewal	COMPANY A	W0126547	05/01/2024	7	5	\$0	\$0	n/a	Not Started	Not Started	
Start Open Enrollment	B	W0122859	05/01/2024	12	12	\$0	\$0	n/a	Not Started	Not Started	
Run a Quote	C	W0126552	05/01/2024	46	40	\$0	\$0	n/a	Not Started	Not Started	
	D	W0111878	05/01/2024	60	60	\$0	\$0	n/a	In Progress	Not Started	
	COMPANY E	W0126632	05/01/2024	3	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY F	W0117430	05/01/2024	2	2	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY G	W0126581	05/01/2024	100	88	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY H	W0098369	05/01/2024	75	75	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY I	W0117526	05/01/2024	2	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY J	W0122937	05/01/2024	3	1	\$0	\$0	n/a	Not Started	Not Started	

Employee medical rates and plan benefits

Employee contribution: \$184.68
Employee contribution to dependents: \$0.00
Total employee contribution: \$184.68

Total employer contribution: \$342.99
Total employee contribution: \$184.68
Total premium: \$527.67

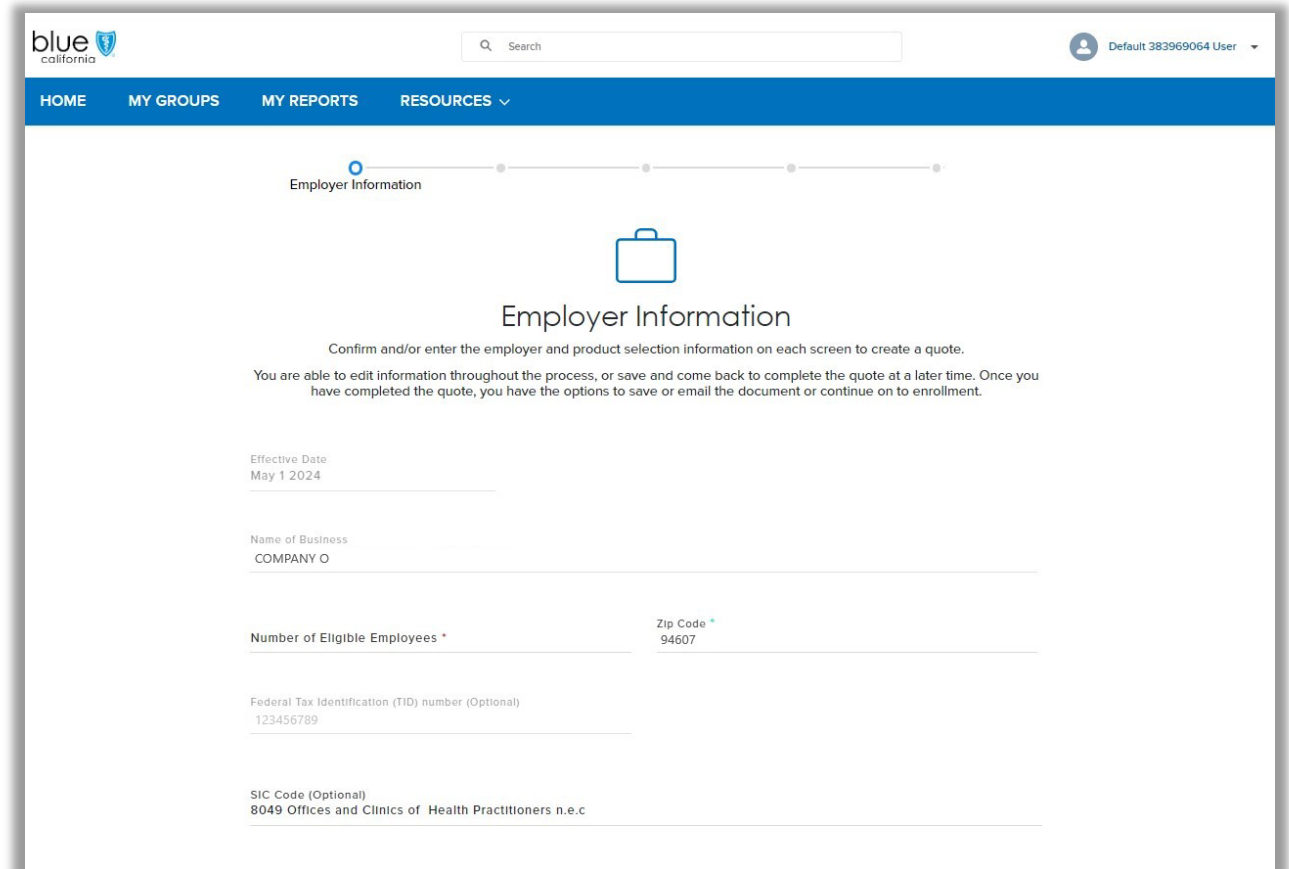
Single plan view

Plan benefits	In-network	Blue Shield Bronze 40 PPO 6300/40 + Child Dental
Medical deductible	In-network	\$6,300
Out-of-pocket maximum	In-network	\$9,100
Pharmacy deductible	In-network	\$500
Copayment	In-network	\$60
Emergency room	In-network	40%
Inpatient hospitalization	In-network	40%
Urgent care	In-network	\$60
Rx Tier 1	In-network	\$17
Rx Tier 2	In-network	40%
Rx Tier 3	In-network	40%
Rx Tier 4	In-network	40%

Name	Age	Status	EE premium	DEP premium	Total
Peter Potter	32	EE	\$527.67	\$0.00	\$527.67

Renewal quote – group information

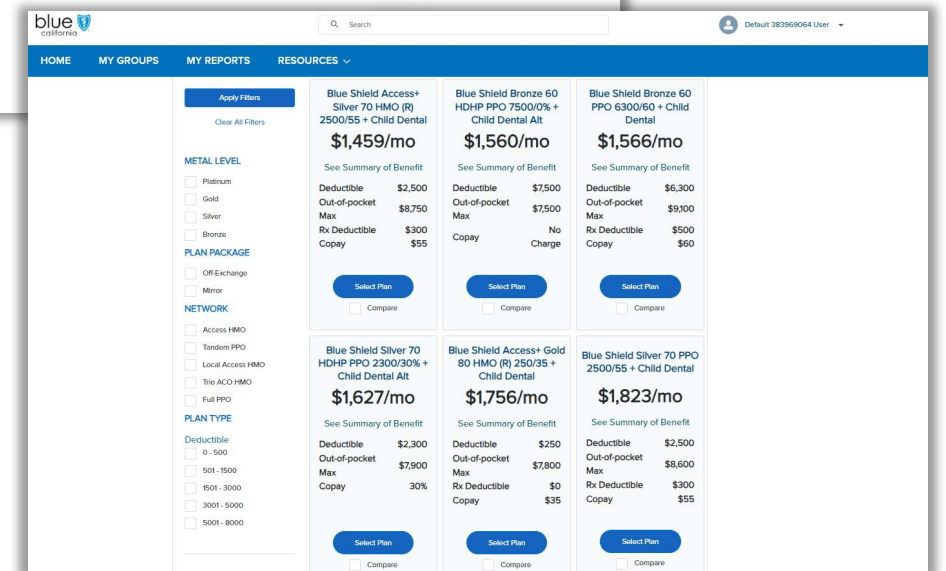
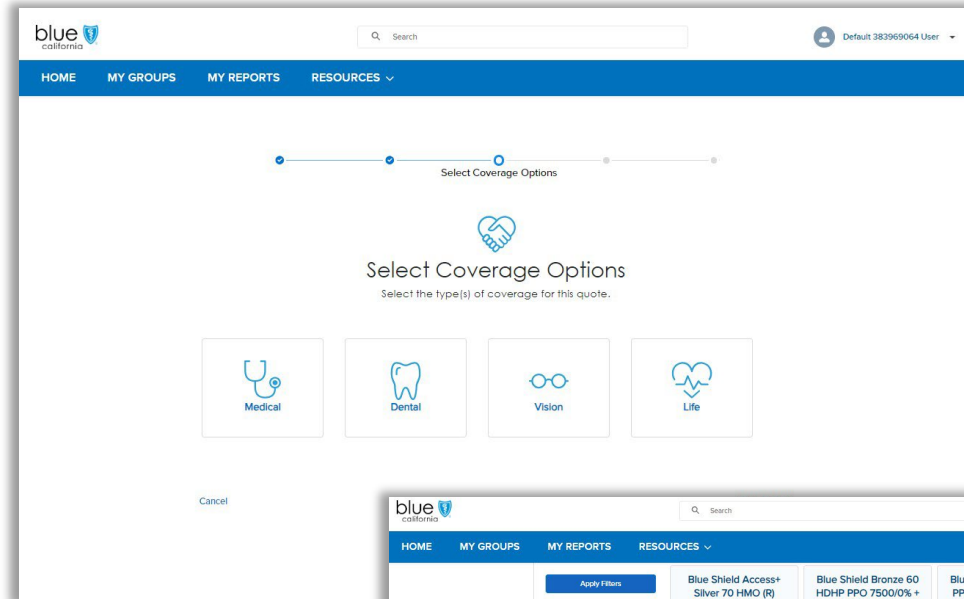
- Quotes started from the renewal dashboard will pre-populate some of the group's required quoting information including:
 - Plan effective date
 - Group name
 - Tax ID
 - Zip code
 - SIC code
- We'll always ask you to enter in the number of eligible employees you want on this quote
- Update Zip code, SIC code if they have changed since last year



The screenshot shows the 'Employer Information' form in the Blue Shield of California portal. The page has a blue header with navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and user profile (Default 383969064 User) are in the top right. A progress indicator shows 'Employer Information' as the first step. The main content area features a briefcase icon and the title 'Employer Information'. Below this, instructions state: 'Confirm and/or enter the employer and product selection information on each screen to create a quote. You are able to edit information throughout the process, or save and come back to complete the quote at a later time. Once you have completed the quote, you have the options to save or email the document or continue on to enrollment.' The form fields are: 'Effective Date' (May 1 2024), 'Name of Business' (COMPANY O), 'Number of Eligible Employees *' (empty), 'Zip Code *' (94607), 'Federal Tax Identification (TID) number (Optional)' (123456789), and 'SIC Code (Optional)' (8049 Offices and Clinics of Health Practitioners n.e.c).

Renewal quote - select products and shop plans

- Next, the users select the products to be quoted on the Select Coverage Options pages
 - All products and plans can be quoted except for graded life



Renewal quote - finalize your quote

- The Employer Contributions section will cover all products being quoted
 - This section is not required during the quoting phase
- The completed quote can be downloaded, emailed securely, or the user can proceed by clicking Continue to Enrollment
 - CSV downloads and emails are available immediately.
 - A message will appear on the screen to confirm your PDF download request. An email will be sent when the file is ready for download from the tool.

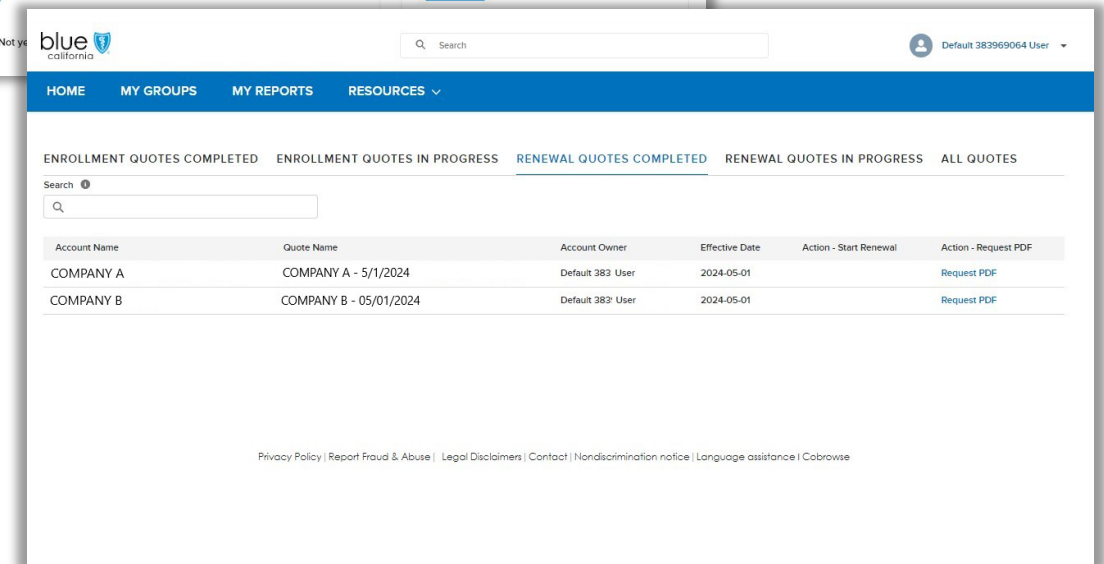
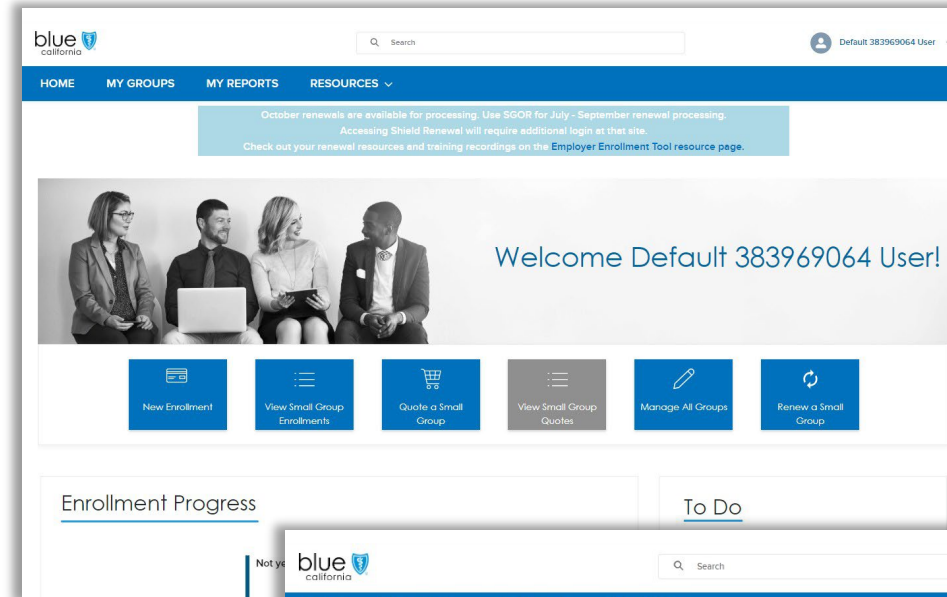
The screenshot shows the 'Employer Contributions' page in the Blue Shield of California portal. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and user profile are in the top right. A progress bar at the top indicates the current step. The main content area features a large blue dollar sign icon and the title 'Employer Contributions'. Below the title, it says 'Enter the employer contributions for the products and coverage being quoted'. There are four input fields: 'Medical Employee Contribution', 'Dental Employee Contribution', 'Medical Dependent Contribution', and 'Dental Dependent Contribution'. Each field has a '\$' and '%' icon and an 'Enter a number' prompt. A 'Cancel' button is at the bottom left.

The screenshot shows the 'Your Complete Quote' page in the Blue Shield of California portal. The page has the same blue header and navigation as the previous screenshot. A progress bar at the top indicates the current step. The main content area features a blue document icon and the title 'Your Complete Quote'. Below the title, it says 'Here is your quote.' and 'You can download and email the quote or continue on to the group enrollment. You can update the information in the quote at any time and a record of your quote will be available for 60 days.' There are three options: 'Send quote CSV via secure email', 'Download CSV file', and 'Request PDF'. A blue button at the bottom says 'Return to Group Renewals'.

Renewal quote - view completed quotes

Follow these steps to view completed quotes and retrieve the PDF quote proposal:

1. From the Employer Enrollment Tool landing page, click on View Quotes
2. Click on the Renewal Quotes Completed tab
3. A list of quoted groups is displayed. Click on the hyperlinked name of the group under the Quote Name column
4. View the information provided for the quote
5. In the Files section, click on the PDF file link to open and download the quote proposal



Submit group-level renewal changes

Navigate to group-level changes

On the renewal dashboard, select Start Renewal from the Action menu

Submission tips

- Some specialty plan changes require you to cancel and add in the same transaction. Move the plan into the cancel plan box before adding the new plan
- You can submit just group-level changes or group and member changes from this workflow

The screenshot shows the Blue Shield of California renewal dashboard. At the top, there is a search bar and a user profile for 'Default 383969064 User'. The navigation menu includes 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below the navigation, there is a monthly calendar view with 'May 2024' selected. A message states: 'Click the Action dropdown menu to begin the renewal process; Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.'

Below the message, there are filters for 'Renewal Status' (set to '--None--') and 'Open Enrollment Status' (set to '--None--'). A button labeled 'Access Shield Renewal' is visible. The main content is a table with the following columns: Action, Account Name, Group ID, Renewal Date, No of Employees, No of Active Members, Current Premium, Renewal Premium, % Change, Renewal Status, Open Enrollment Status, and Renewal Iterations.

Action	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
Start Renewal	COMPANY A	W0126547	05/01/2024	7	5	\$0	\$0	n/a	Not Started	Not Started	
Start Open Enrollment	B	W0122859	05/01/2024	12	12	\$0	\$0	n/a	Not Started	Not Started	
Run a Quote	C	W0126552	05/01/2024	46	40	\$0	\$0	n/a	Not Started	Not Started	
	D	W0111878	05/01/2024	60	60	\$0	\$0	n/a	In Progress	Not Started	
	COMPANY E	W0126632	05/01/2024	3	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY F	W0117430	05/01/2024	2	2	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY G	W0126581	05/01/2024	100	88	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY H	W0098369	05/01/2024	75	75	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY I	W0117526	05/01/2024	2	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY J	W0122937	05/01/2024	3	1	\$0	\$0	n/a	In Progress	Not Started	

At the bottom of the table, there is a pagination control showing page 1 of 8.

View real-time renewals

View your client's coverage and offerings before making renewal changes for both group and member level renewal changes.

This information is updated real time as changes occurring in EET or other channels are submitted and processed by Blue Shield.

You can also view the renewal information and decide to not make changes and exit out of the workflow by clicking on Cancel.

The screenshot shows the 'Renewal Information' page in the Blue Shield of California portal. The page title is 'It's time to renew'. Below the title, a message states: 'Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.' A table provides account details: Account Name (COMPANY X), Group ID (W0126547), and Renewal Date (05/01/2024). A comparison table follows, showing 'Current Year' and 'Renewal Year' data for employees, covered members, dependents, and premiums. Below this, there are sections for 'Dental Premium' and 'Vision Premium', each with a list of plan options and their respective premium amounts. A 'Download Member Roster' button is located at the bottom of the plan comparison section. A footer note explains that users can cancel out of the screen if no changes are needed, or proceed to the next step if changes are required.

Account Name	Group ID	Renewal Date
COMPANY X	W0126547	05/01/2024

Current Year		Renewal Year	
No of employees	9	No of employees	9
No of covered members	7	No of covered members	7
No of covered dependents	0	No of covered dependents	0
Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

Dental Premium: \$0	Dental Premium: \$0	% Change: n/a
Diamond DPPO/\$3000/U95/Adult+Child Ortho	Diamond DPPO/\$3000/U95/Adult+Child Ortho	
Gold DPPO/\$2000/U90/Adult+Child Ortho	Gold DPPO/\$2000/U90/Adult+Child Ortho	

Vision Premium: \$0	Vision Premium: \$0	% Change: n/a
Preferred Vision Plus for Small Business 10/25/	Preferred Vision Plus for Small Business 10/25/	
Ultimate Vision Plus for Small Business 10/25/1	Ultimate Vision Plus for Small Business 10/25/1	

[Download Member Roster](#)

If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

View real-time renewals

- Premium calculations are updated when plan or membership changes are processed
- Plans are listed in order so you can view the year-over-year changes
- Download a CSV file member roster for current enrollment and plan elections

The screenshot displays the 'Renewal Information' page in the Blue Shield of California portal. At the top, there is a search bar and a user profile dropdown for 'Default 383969064 User'. The navigation menu includes 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. The main heading is 'It's time to renew', followed by a sub-heading: 'Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.'

Account Name	Group ID	Renewal Date
COMPANY X	W0126547	05/01/2024

Current Year		Renewal Year	
No of employees	9	No of employees	9
No of covered members	7	No of covered members	7
No of covered dependents	0	No of covered dependents	0
Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

Dental Premium: \$0	Dental Premium: \$0	% Change: n/a
Diamond DPPO/\$3000/U95/Adult+Child Ortho	Diamond DPPO/\$3000/U95/Adult+Child Ortho	
Gold DPPO/\$2000/U90/Adult+Child Ortho	Gold DPPO/\$2000/U90/Adult+Child Ortho	

Vision Premium: \$0	Vision Premium: \$0	% Change: n/a
Preferred Vision Plus for Small Business 10/25/	Preferred Vision Plus for Small Business 10/25/	
Ultimate Vision Plus for Small Business 10/25/1	Ultimate Vision Plus for Small Business 10/25/1	

[Download Member Roster](#)

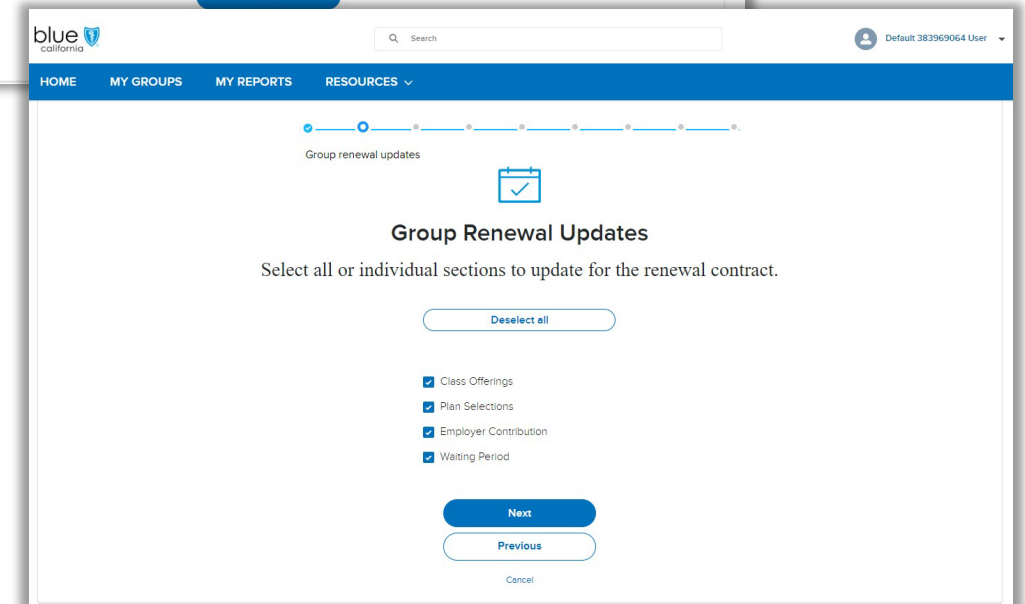
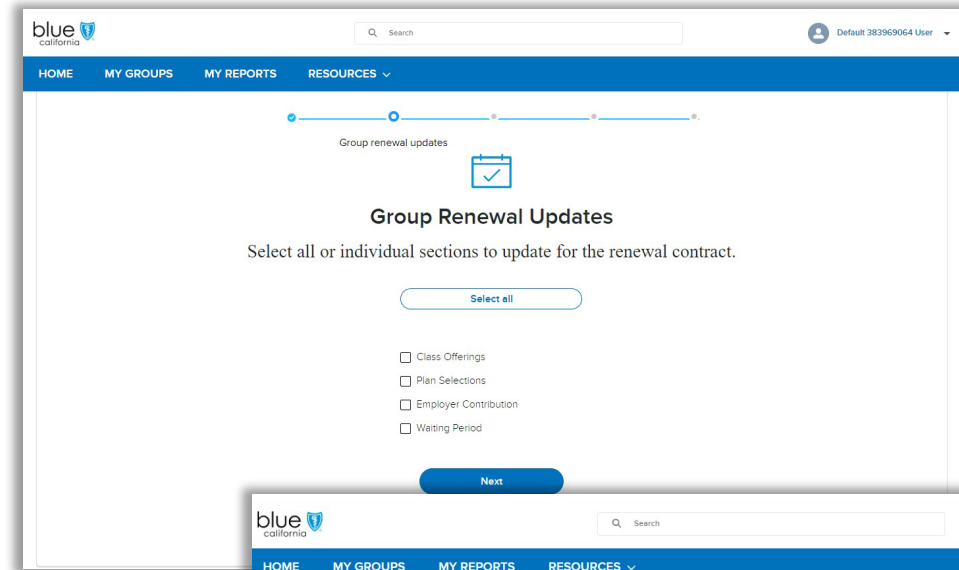
If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

Renewal - select the changes

Your clients are unique and so are their renewal needs. So instead of a one size fits all renewal workflow, we built a customizable workflow so you can address key changes and skip unnecessary steps.

Use the checkboxes to select the changes you want in your workflow. Select all, or just some and click Next.

If you select a change and realize you don't need to make a change, use the No Changes are Needed button to proceed to the next step.



Renewal – class plan

- The tool will display the current active classes.
- Select the checkboxes to add a new class.
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed

The screenshot shows the 'Class Offerings' page in the Blue Shield of California portal. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and user profile (Default 383969064 User) are in the top right. The main content area is titled 'Class Offerings' and contains instructions: 'Make changes to the enrollment classes offered by the group. Check the box to select an available class to be added to the group. Classes already offered cannot be re-selected.' Below this, a table shows the current offerings: 'ACTIVE CA ELIGIBLES' and 'ACTIVE OOS ELIGIBLES'. At the bottom, there are radio buttons for selecting a new class: 'Active out of state employees', 'COBRA California members', 'COBRA out of state members', and 'No changes are needed'.

blue shield of california

Search

Default 383969064 User

HOME MY GROUPS MY REPORTS RESOURCES

Class Offerings

Make changes to the enrollment classes offered by the group
Check the box to select an available class to be added to the group.
Classes already offered cannot be re-selected.

The group currently offers the classes listed in the table

ACTIVE CA ELIGIBLES
ACTIVE OOS ELIGIBLES

Select the button in the below list of available classes to add a new class to the group. You do not need to select the classes already offered.

Active out of state employees
 COBRA California members
 COBRA out of state members
 No changes are needed

Renewal - plan adds and cancels

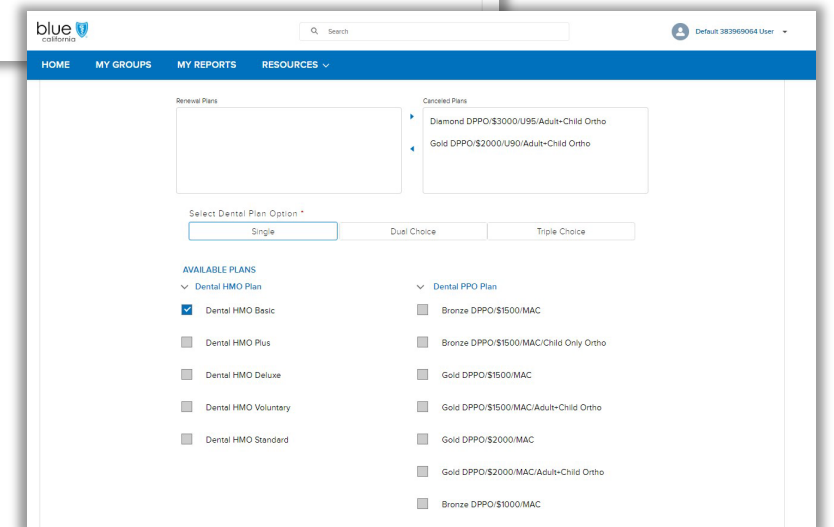
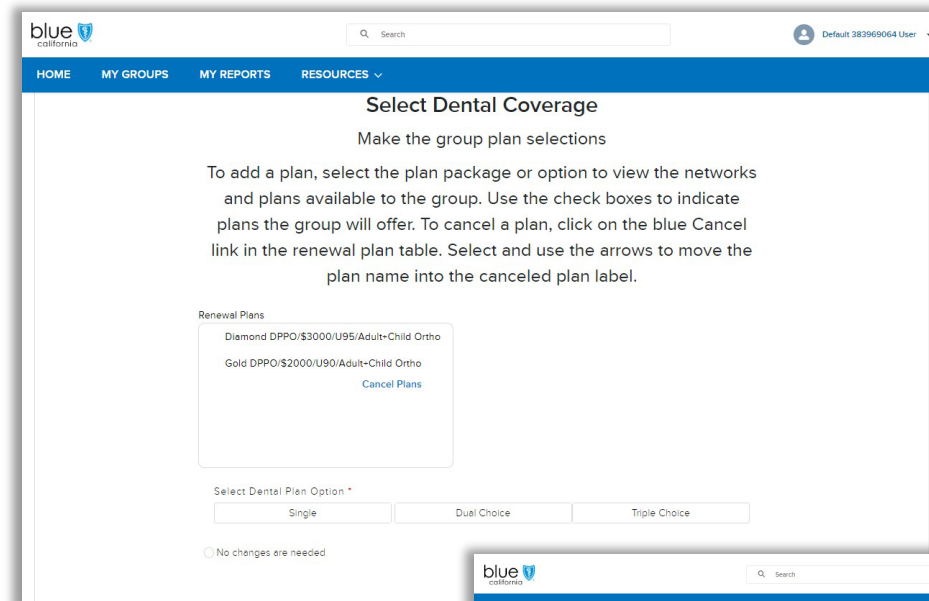
- Use the checkboxes to indicate if you are adding plans, canceling plans, or both
- Click on the product cards to edit or add plans for that product

Plans Adds

- Select the plan package and available network to view plans
- Check the boxes next to the plan name to add them to the group offerings

Plan cancels

- Click on the Cancel Plans link in the existing plans display box
- Click on the plan name you want to cancel and use the arrows to move the plan to the canceled plans box
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.



Renewal - contribution

- Use the checkboxes to select the offered products to make changes
- Select the checkbox to indicate if the contribution is a dollar amount or percentage amount and enter the desired amount
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.

The screenshot shows the 'Employer Contribution' page on the Blue Shield of California website. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and user profile are in the top right. The main content area is titled 'Employer Contribution' and includes instructions: 'Make changes to the contribution amounts. Check the box to indicate which product's contribution fields changing. Select the contribution type and enter the new amount. Required fields must be completed and before moving forward.'

Under the heading 'Employer Contributions', there is a sub-section 'Choose the details you would like to modify'. A checkbox labeled 'Medical' is checked. Below this, there are two sections for contribution amounts:

- Medical** (with an information icon):
 - Subscriber Contribution:** Includes radio buttons for '\$' and '%' (the '%' button is selected) and an input field with the value '100' and the label 'Enter a number*'.
 - Dependent Contribution:** Includes radio buttons for '\$' and '%' (the '%' button is selected) and an input field with the value '0' and the label 'Enter a number*'.

At the bottom, there is an unchecked radio button labeled 'No changes are needed'.

Renewal - waiting period

- Click on the drop-down menu to select an available waiting period rule for each class plan
- If you do not need to make changes after viewing the information, select the button for No changes are needed to proceed.

The screenshot shows the 'Eligibility Options' page in the Blue Shield of California portal. The page has a blue header with the logo and navigation links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. A search bar and a user profile icon are also visible. The main content area is titled 'Eligibility Options' and contains the following text: 'Enter the new eligibility information in the respective section. Required fields must be completed before moving forward.' Below this, there is a section for 'Waiting Period' with a dropdown arrow. The instructions state: 'Change the waiting period for the corresponding Classes offered. Select the date for the changes to take effect then use the drop down menu to select the waiting period rule.' There are two rows of input fields: 'ACTIVE CA ELIGIBLES' and 'ACTIVE OOS ELIGIBLES', each followed by a date dropdown menu. At the bottom, there is a radio button for 'No changes are needed' and three buttons: 'Next' (solid blue), 'Previous' (white with blue border), and 'Cancel' (small text).

Start Open Enrollment from dashboard

Navigate to member-level changes when not combining with group-level submission

On the renewal dashboard, select Start Open Enrollment from the Action menu

Submission tips

- Only member cancelations and plan changes are available in the renewal workflow
- Use the maintenance workflows to enroll new employees or update existing member information

The screenshot shows the Blue Shield of California renewal dashboard. At the top, there is a search bar and a user profile for 'Default: 383969064 User'. Below the navigation bar (HOME, MY GROUPS, MY REPORTS, RESOURCES), there is a monthly navigation bar with 'May 2024' selected. A message states: 'Click the Action dropdown menu to begin the renewal process: Start Renewal for group-level changes, Start Open Enrollment for member-level changes, and Run a Quote for plan quoting.' Below this, there are filters for 'Renewal Status' (set to '--None--') and 'Open Enrollment Status' (set to '--None--'). A prominent 'Access Shield Renewal' button is visible. The main content is a table with the following columns: Action, Account Name, Group ID, Renewal Date, No of Employees, No of Active Members, Current Premium, Renewal Premium, % Change, Renewal Status, Open Enrollment Status, and Renewal Iterations. The table lists ten companies (A through J) with their respective renewal dates (all 05/01/2024), employee counts, and active member counts. The 'Action' column for each row contains a dropdown menu with options: Start Renewal, Start Open Enrollment, and Run a Quote. The 'Renewal Status' and 'Open Enrollment Status' columns show various states like 'Not Started', 'In Progress', and 'Not Started'.

Action	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
Start Renewal	COMPANY A	W0126547	05/01/2024	7	5	\$0	\$0	n/a	Not Started	Not Started	
Start Open Enrollment	B	W0122859	05/01/2024	12	12	\$0	\$0	n/a	Not Started	Not Started	
Run a Quote	C	W0126552	05/01/2024	46	40	\$0	\$0	n/a	Not Started	Not Started	
	D	W011878	05/01/2024	60	60	\$0	\$0	n/a	In Progress	Not Started	
	COMPANY E	W0126632	05/01/2024	3	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY F	W0117430	05/01/2024	2	2	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY G	W0126581	05/01/2024	100	88	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY H	W0098369	05/01/2024	75	75	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY I	W0117526	05/01/2024	2	1	\$0	\$0	n/a	Not Started	Not Started	
	COMPANY J	W0122937	05/01/2024	3	1	\$0	\$0	n/a	In Progress	Not Started	

View real-time renewals

View your client's coverage and offerings before making renewal changes for both group and member level renewal changes.

This information is updated real time as changes occurring in EET or other channels are submitted and processed by Blue Shield.

You can also view the renewal information and decide to not make changes and exit out of the workflow by clicking on Cancel.

The screenshot shows a web interface for viewing renewal information. At the top, there is a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. A search bar and a user profile icon are also present. The main content area is titled 'Renewal Information' and features a prominent heading 'It's time to renew'. Below this, a message states: 'Below is the year-over-year renewal plan comparison with the group's most current plan offerings and their future year mapping.' A table provides key details for 'COMPANY X' (Group ID: W0126547, Renewal Date: 05/01/2024). A comparison table follows, showing metrics for the 'Current Year' and 'Renewal Year'. Below the comparison, there are sections for 'Dental Premium' and 'Vision Premium', each with a list of plan options and their respective premium amounts. A 'Download Member Roster' button is located at the bottom of the plan comparison section. A final note at the bottom of the page advises that if no changes are needed, users can cancel out of the screen, and if changes are required, they should have group applications ready before clicking 'Next'.

Account Name	Group ID	Renewal Date
COMPANY X	W0126547	05/01/2024

Current Year		Renewal Year	
No of employees	9	No of employees	9
No of covered members	7	No of covered members	7
No of covered dependents	0	No of covered dependents	0
Infertility Rider	No	Infertility Rider	No
Total premium	\$100	Total premium	\$105
		% Change	5%

Dental Premium: \$0	Dental Premium: \$0	% Change: n/a
Diamond DPPO/\$3000/U95/Adult+Child Ortho	Diamond DPPO/\$3000/U95/Adult+Child Ortho	
Gold DPPO/\$2000/U90/Adult+Child Ortho	Gold DPPO/\$2000/U90/Adult+Child Ortho	

Vision Premium: \$0	Vision Premium: \$0	% Change: n/a
Preferred Vision Plus for Small Business 10/25/	Preferred Vision Plus for Small Business 10/25/	
Ultimate Vision Plus for Small Business 10/25/1	Ultimate Vision Plus for Small Business 10/25/1	

[Download Member Roster](#)

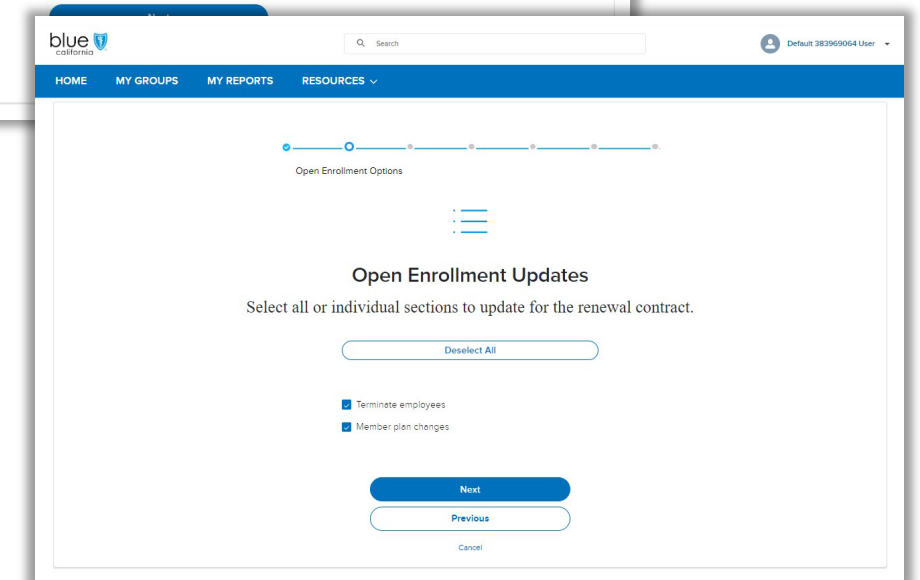
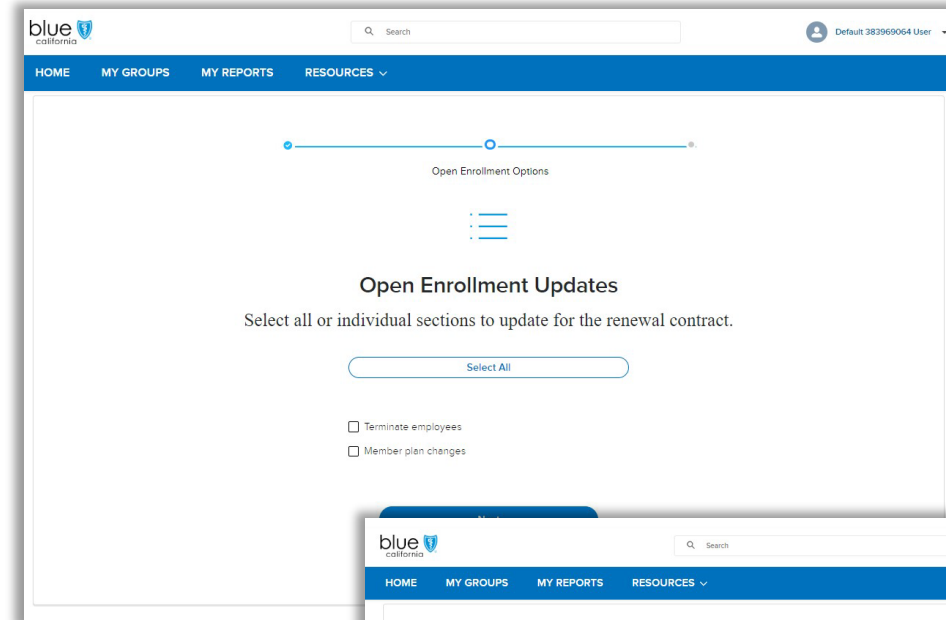
If there are no plan or group level information changes needed you can cancel out of this screen. If you have renewal changes to make we recommend having the group applications ready before clicking Next.

Open Enrollment - select the changes

Your clients are unique and so are their renewal needs. So instead of a one size fits all renewal workflow, we built a customizable workflow so you can address key changes and skip unnecessary steps.

Use the checkboxes to select the changes you want in your workflow. Select all, or just some and click Next.

If you select a change and realize you don't need to make a change, use the No Changes are Needed button to proceed to the next step.



Open Enrollment cancel

- Use the toggle button to select Enter Terminations
- Select the members and enter their cancellation details in the table
- Use the check box next to the member's name to select them for cancellation.
 - For larger rosters, use the name or ID search to quickly find and select members
- Next, provide the cancellation date and reason
 - If all the employees have the same date and reason, use the Apply to all Selected Employees button to save you clicks

blue shield of california

Search

Default 383969064 User

HOME MY GROUPS MY REPORTS RESOURCES

employee's name from the group roster below then provide the cancellation information.

Enter Terminations Upload File

Termination Date Benefit end date Cancel Reason CalCOBRA Eligible

Select an Option Select an Option

Apply to all Selected Employees

Member Name Member ID

Member Name Member ID Termination Date Benefit End Date Cancel Reason CalCOBRA Eligible CalCOBRA Eligible Reason

Member A 123456789 Select an Option Select an O... Select an Option

blue shield of california

Search

Default 383969064 User

HOME MY GROUPS MY REPORTS RESOURCES

Apply to all Selected Employees

Member Name Member ID

Member Name Member ID Termination Date Benefit End Date Cancel Reason CalCOBRA Eligible CalCOBRA Eligible Reason

Member A 123456789

Member B 123456789

Member C 123456789

May 2024

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Today

< Previous 1 Next >

Open Enrollment – member bulk cancelations

- Use the toggle button to select Upload File
- Click on the Download template link
- Read the template instructions tab before filling in information
- Provide the member name, cancel date, and reason into the corresponding columns
- If eligible, enter in the CalCOBRA notification columns
 - Yes for CalCOBRA replaces the CalCOBRA notification form
- Save the document as a CSV file
- Navigate back to the tool and click on Upload File. Preview your file in the table before moving forward

The image shows two overlapping screenshots. The top one is a web browser window displaying the 'blue california' 'Terminate Employees' page. It has a navigation bar with 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. The main content area has a title 'Terminate Employees' and a sub-header 'Cancel coverage for multiple employees at once. Any dependents associated with the employees will also be canceled from coverage.' Below this is a white box with an 'Upload Files' button and the text 'Or drop files here'. The bottom screenshot is a Microsoft Excel spreadsheet titled 'BlueShield_EET_MassTermination (4)'. The spreadsheet has a header row with columns: 'Member Name', 'Member ID', 'Termination Date', 'Cancel Reason', 'CalCOBRA Eligible', and 'CalCOBRA Eligible Reason'. Below the header, there are 10 rows of data for members A through I, with columns for their names, IDs, termination dates, reasons, and CalCOBRA eligibility status.

	A	B	C	D	E	F
	Member Name	Member ID	Termination Date	Cancel Reason	CalCOBRA Eligible	CalCOBRA Eligible Reason
1	Name A	123456789	04/30/2024	Military Active Duty	No	
2	Name B	123456789	04/30/2024	Cancel Per Request	Yes	Termination or Resignation
3	Name C	123456789	04/30/2024	Cancel Per Request	Yes	Termination or Resignation
4	Name D	123456789	04/30/2024	Cancel Per Request	No	
5	Name E	123456789	04/30/2024	Cancel Per Request	No	
6	Name F	123456789	04/30/2024	Termination of Employment	Yes	Termination or Resignation
7	Name G	123456789	03/31/2024	Termination of Employment	Yes	Termination or Resignation
8	Name H	123456789	05/30/2024	Termination of Employment	Yes	Termination or Resignation
9	Name I	123456789	05/30/2024	Termination of Employment	Yes	Termination or Resignation
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Open Enrollment – member bulk plan changes

- Expand the class sections to view the full subscriber roster for the respective class plan
- Check the box by the member or members' name to make their plan assignment
 - If multiple subscribers are moving to the same plan, check the boxes next to all names
- Click on the Plan menu and select an available plan in the menu
- Click on the Action menu and select Assign Plans
- Repeat these steps for all subscribers in the roster

blue shield of california

HOME MY GROUPS MY REPORTS RESOURCES

Move impacted subscribers to new plans

Expand the section(s) to move subscribers to the available plans. Select the members and use the action dropdown menu to assign the new plans.

ACTIVE CA ELIGIBLES Plans Actions

Subscriber Name	Member ID	Plan
<input checked="" type="checkbox"/> Member A	123456789	Gold Full PPO 0/35 OffEx
<input checked="" type="checkbox"/> Member B	123456789	Gold Trio HMO 0/35 OffEx
<input checked="" type="checkbox"/> Member C	123456789	Gold Access+ HMO (R) 0/35 OffEx
<input checked="" type="checkbox"/> Member D	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member E	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member F	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member G	123456789	Gold Full PPO 0/35 OffEx

blue shield of california

HOME MY GROUPS MY REPORTS RESOURCES

Move impacted subscribers to new plans

Expand the section(s) to move subscribers to the available plans. Select the members and use the action dropdown menu to assign the new plans.

ACTIVE CA ELIGIBLES Gold Trio HMO 1500/35 OffEx Actions

Subscriber Name	Member ID	Plan
<input checked="" type="checkbox"/> Member A	123456789	Gold Full PPO 0/35 OffEx
<input checked="" type="checkbox"/> Member B	123456789	Gold Trio HMO 0/35 OffEx
<input checked="" type="checkbox"/> Member C	123456789	Gold Access+ HMO (R) 0/35 OffEx
<input checked="" type="checkbox"/> Member D	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member E	123456789	Gold Full PPO 0/35 OffEx
<input type="checkbox"/> Member F	123456789	Gold Access+ HMO (R) 0/35 OffEx
<input type="checkbox"/> Member G	123456789	Gold Full PPO 0/35 OffEx



Support

Access tool resources on Broker Connection's [resource page](#)

Additional resources for enrollment and eligibility support:

- [2024 Admin Guide](#)
 - [Employer Enrollment Tool Maintenance guide](#)
 - [Tutorial video library](#)
-

Need to talk to someone?

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(800) 559-5905