

## Enrollment Guide for Employers

This guide explains how to access key enrollment features in the 24/7 self-service [Employer portal](#). Need to register for the portal? Click here for a portal [user guide](#).

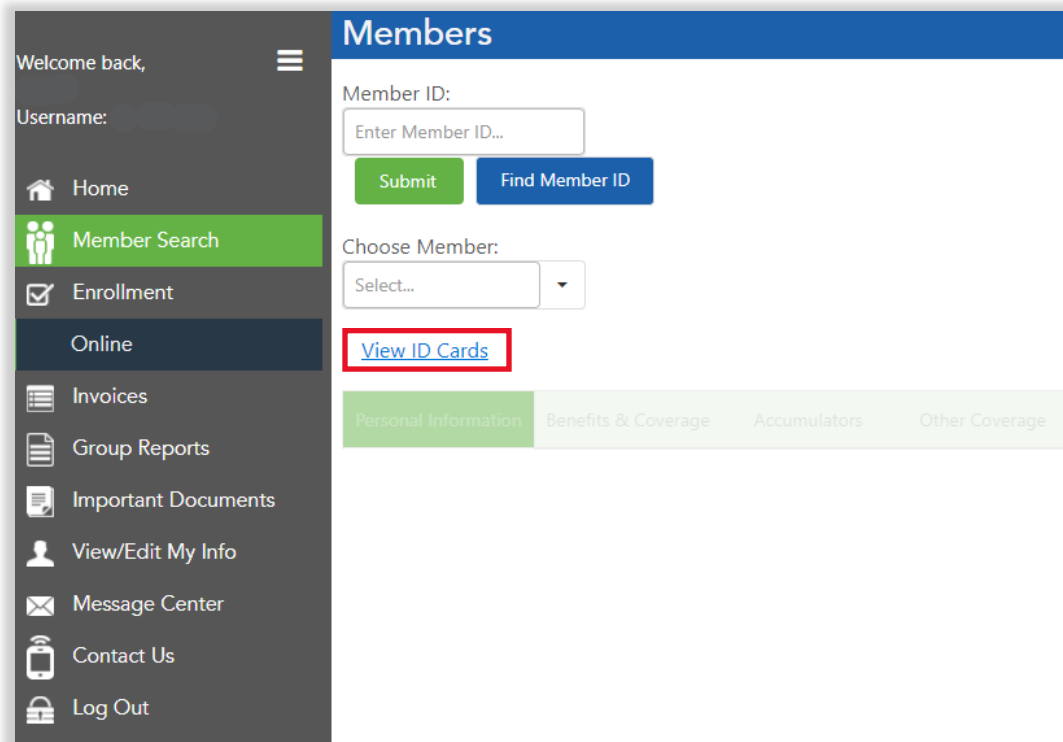
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## Member ID Cards

To access Member ID Cards, log in to the portal 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 > Online** in the left navigation
- Scroll to the **Manage Membership** grid, then select the **Subscriber ID**
- Click **View ID Cards**

## Online Enrollment

To access Online Enrollment, log in to the portal and select **Enrollment**, then **Online** in the left navigation.

## Enrollment Via Census - Export, Edit and Upload

1. From **Enrollment > Online** in the left navigation, click **Census** to view the **Group Census** page.

Group Name	Account ID/Group	Actions	Census	Status	Tax ID	Renewal Date	Last Renewed On	Subscribers	Members
	00001		Census	Active		11/1/2021	11/1/2020	1091	1452

Subscriber ID	Actions	Last Name	First Name	Birth Date	Status	Effective Date	End Date	Benefit Plan	Group or Subaccount
	Edit Terminate Add Dependent			3/2/1969	Active	11/1/2020			00001001
	Edit Terminate Add Dependent			5/31/1981	Active	11/1/2020			00001001
	Edit Terminate Add Dependent			7/1/1982	Active	11/1/2020			00001001
	Edit Terminate Add Dependent			1/29/1975	Active	11/1/2020			00001001
	Edit Terminate Add Dependent			9/18/1982	Active	11/1/2020			00001001

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

**Census Export**

Group ID:

Group Name:

As of Date:

[Export Census](#)

**Census Upload**

1. Download the Electronic Enrollment Form by selecting one of the options below below:
  - 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](#)
2. Fill out the form and save it to your computer.
3. Upload the form to FirstCare using the Enrollment File Selection section below.
4. Click the submit button.

Enrollment File Selection File Types: EXCEL (.xlsx)

Select file or Drop file here

[Submit](#) [Clear](#)

3. 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
<b>ENROLLING FAMILY COVERAGE:</b>															
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
<b>ENROLLING SINGLE COVERAGE:</b>															
A	N			111223333	1.11E+08	SMITH	JAMES		Self	M	19500805	SFP0010000	HEN14EPO_1	20000101	20050101
<b>ADDING A DEPENDENT:</b>															
A	N			111223333	1.11E+08	SMITH	JAMES JR		Child	M	20180101	SFP0010000	HEN14EPO_1022		20180101
<b>TERMING COVERAGE:</b>															
T	N			111223333	1.11E+08	SMITH	JAMES		Self	M	19500805	SFP0010000	HEN14EPO_1	20000101	20050101
<b>ADDING COBRA COVERAGE:</b>															
A	Y		444556666		4.45E+08	DOE	JANE		Spouse	F	19450523	SFCOBRA111	HEN14COB_1	20060101	20060101
<b>ADDRESS CHANGE:</b>															
C	N		555117777		5.55E+08	JONES	SAM		Self	M	19650217	SFA0010000	HEN14EPO_1	20030301	20050101

**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:
  - 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**.

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

## Adding New Single Subscribers and Dependents Via the Portal

1. From **Enrollment > Online** in the left navigation, select the Group Name to view **Account Details – Enrollment**.
2. 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.

The screenshot displays the 'Account Details - Enrollment' page. It features a left-hand navigation menu with options like Home, Member Search, Enrollment, Online, Invoices, Group Reports, Important Documents, View/Edit My Info, Message Center, Contact Us, and Log Out. The main content area shows a table of groups with columns: Group Name, Account ID/Group, Actions, Census, Status, Tax ID, Renewal Date, Subscribers, and Members. A red arrow points to the 'Add Subscriber' link in the Actions column. Below this is a section for 'Manage Membership (Edit, Terminate, Add Dependent)' with a table of subscribers and a table of dependents. Red arrows highlight the 'Add Subscriber' and 'Add Dependent' links.

3. 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.

The screenshot shows the 'Add Subscriber' form, step 1: Group and Benefit Information. It includes a dropdown for 'Group or Subaccount' and a dropdown for 'Qualifying Event \*' with a list of options: Adoption, Birth, Changed from Part-time to Full-time employee, COBRA, Court-Ordered, Loss of Other Coverage, Marriage, New Employee, Open Enrollment, and State Continuation.

The screenshot shows the 'Add Subscriber' form, step 2: Personal Information. It includes a dropdown for 'Group or Subaccount', a dropdown for 'Qualifying Event \*' with 'New Employee' selected, and a dropdown for 'Waiting Period \*' with a list of options: 0 = eff date of hire, 30 Days = eff 31st day of employment, 60 Days = eff 61st day of employment, 90 Days = eff 91st day of employment, 1st of mo. following hire date, 1st of mo. following 30 days employment, 1st of mo. following 60 days employment, and 1st of mo. following 90 days employment.

4. 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.
  
5. **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.
  
6. **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

### Adding Dependents During Open Enrollment - Existing Members Only

1. **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.
  
2. Select **Qualify Event > Open Enrollment** from the drop-down.
  
3. **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.

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

### 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.

### Address Changes, Etc.

1. 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.
2. Select the **Change of Demographics** option as the qualifying event.

### Member Termination

1. 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.
2. 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
<input type="text"/>	<input type="text"/>	<input type="text"/>	09/24/1966	Self
<input type="text"/>	<input type="text"/>	<input type="text"/>	05/07/1964	Spouse
<input type="text"/>	<input type="text"/>	<input type="text"/>	09/11/2018	Child

3. 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.