**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.

Table of Contents

- Member ID Cards .......................................................... 1
- Online Enrollment .......................................................... 2
- Enrollment Via Census Export, Edit and Upload .................. 2
- Adding New Single Subscribers and Dependents Via the Portal .......................................................... 4
- Adding Dependents During Open Enrollment (Existing Members) .......................................................... 5
- Adding Dependents Outside of Open Enrollment (Existing Members) .................................................. 6
- Address Changes, Etc .......................................................... 6
- Member Termination .......................................................... 6

**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**

![Member ID Card Image](image-url)
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.

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

   ![Census Spreadsheet Screenshot]

   **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.

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.
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](image)

**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.

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.