Support Form Packet

B-8711/19830-24MB

Enrollment Inquiry Support Tool Process

Benefits of the tool

This tool is designed to streamline your work by handling eligibility maintenance requests, enrollment inquiries, billing/reconciliation requests, and other support requests. By submitting your inquiries and requests via this tool, you ensure they are securely transmitted directly to our request management system, which efficiently assigns and processes them within our Enrollment department.

Security

You will need to log in before using the Enrollment Inquiry & Support tool. When submitting requests, the form will auto-populate specific fields based on your profile. It utilizes Secure Sockets Layer (SSL) technology (the industry standard for secure transactions) to transmit the information to our request management system.

Completing the form

The most common reason for an inquiry is likely to be Eligibility Maintenance. You should select this option for subscriber/member activity, which includes new enrollments, additions to an existing contract, changes, terminations, etc. All appropriate paperwork must accompany the request, and you must complete the required fields. If retroactive review is required, please refer to the Member Retro Submission Tip Sheet on page two and include a completed Exception Request form.

Attachments

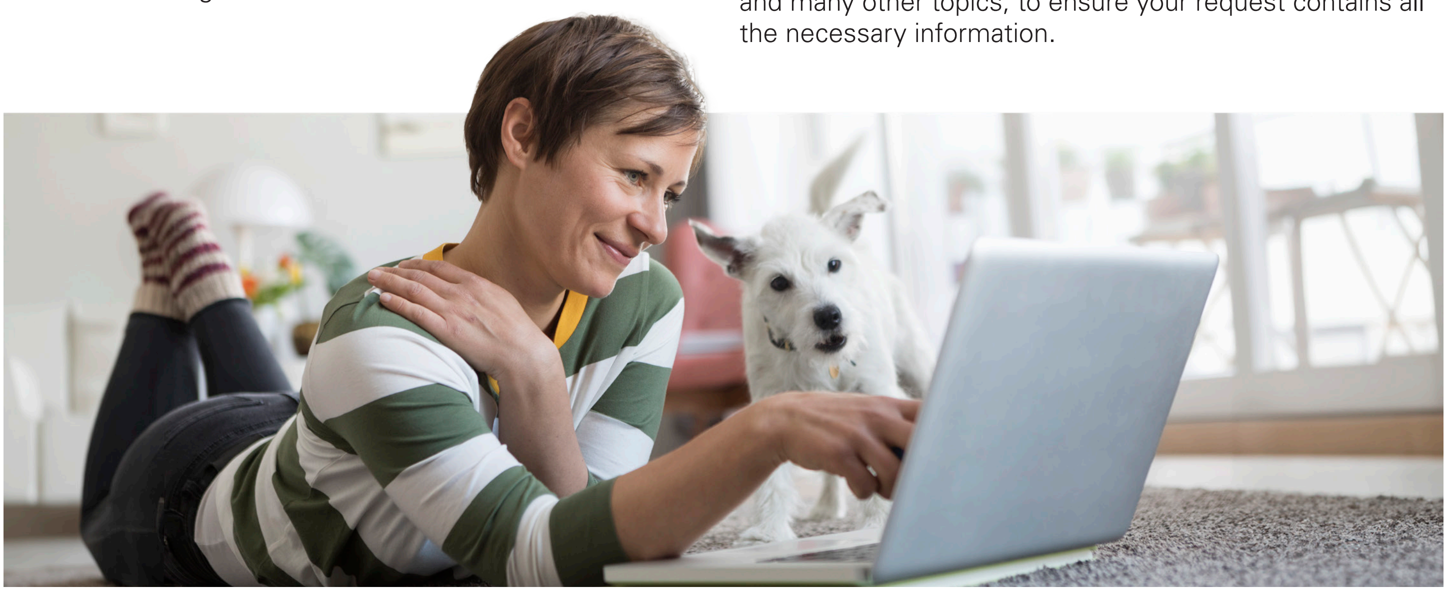
Please ensure that all selected attachments are uploaded to the request before clicking the "Agree and Submit" button. Attach your documentation. The functionality of attachments may vary depending on the browser and version being used. Web browsers such as Google Chrome allow multiple attachments to be submitted on the same request. In contrast, specific versions of Microsoft Edge may only allow one attachment. If your browser has an "Upload" button, fully upload the attachments to the form before submitting.

Tracking and notifications

You will be given a case ID immediately when your case is submitted. Your dashboard will be updated with the case ID in real time. The case ID is used for tracking purposes. Click the 'Search' button to refresh the list and view the most up-to-date status of your inquiries. Upon completion, the secure email you receive will contain the case ID, company name, group number(s), subscriber name, and subscriber ID, if applicable, and entered in the request. It will also contain resolution comments. If you have any questions concerning the status of a specific inquiry, please use the case ID to check the status on your dashboard. Contact your account service consultant with the case number if further assistance is needed.

Additional information needed

If your inquiry does not contain the necessary information to complete the request, you will receive an initial secure email asking for additional information. Replying promptly to the secure email in the ZixIT portal will keep the case open and send the additional information provided to the reviewer. A second reminder email will be sent on the due date. In most cases, this will be two business days later. Suppose additional information is not received within ten days of the due date. In that case, the request will be auto closed, and you must submit a new request. The initial request must contain all required information to prevent enrollment delays. Use your Group Maintenance Guide, a comprehensive resource that provides answers to common questions on enrollment guidelines, billing, online bill pay, and many other topics, to ensure your request contains all the necessary information.



B-5212 / 19824-24MB

Member Retro Submission Tip Sheet:

Required Documentation

Add new subscriber

- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email, web confirmation or electronic file
- ☐ Application with all required (change) information, signatures or copy of electronic file or web transaction with signatures
- ☐ Proof of payroll deductions, pay stubs or payroll system screen shot
- ☐ Proof of involuntary loss of prior coverage (with effective date and members covered listed)
- ☐ Marriage Certificate (if marriage is qualifying event)
- ☐ Acknowledgment of premium impact
- ☐ Proof of Broker/TPA/Group oversight

Add dependents & spouse

- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email, web confirmation, electronic file
- ☐ Application with all required information with signatures or electronic file or web transaction
- ☐ Marriage Certificate
- ☐ Domestic Partner Affidavit
- ☐ Court Order & QMSCO (if applicable)
- ☐ Certificate of Adoption
- ☐ Copy of visa with entry date stamp
- ☐ Proof of payroll deduction change (if applicable)
- ☐ Proof of involuntary loss of prior coverage (with effective date and members covered list)
- ☐ Proof of Broker/TPA/Group oversight
- ☐ Dependent Student Recertification Form and college transcripts

Termination

- ☐ Retro request exception form or group email
- ☐ Proof of prior submission e.g., copy of email
- ☐ Proof of Broker/TPA/Group oversight
- ☐ Copy of electronic file or web transaction COBRA Notice
- ☐ Death Certificate/Obituary
- ☐ QMCSO Disenrollment form (if enrollment was court-ordered)
- ☐ Proof of new coverage (with effective date and members covered list)
- ☐ Evidence of Termination e.g., group's system screenshots, letter of resignation

Change in coverage

- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email, web confirmation, electronic file
- ☐ Proof of qualifying event
- ☐ Completed application with all required information with signatures or copy of electronic file or web transaction
- ☐ Proof of payroll deduction change
- ☐ Proof of Broker/TPA/Group oversight

Reinstatement

- ☐ Retro request exception form or group email clearly explaining request
- ☐ Proof of prior submission e.g., copy of email or web confirmation, electronic file
- ☐ Application with all required information with signatures or web confirmation or electronic file
- ☐ Disabled dependent recertification approval
- ☐ Dependent Student Recertification Form and college transcripts
- ☐ COBRA proof of payment
- ☐ Proof of continuous employment and deductions
- ☐ Proof of Broker/TPA/Group oversight

Vision:

Maximum allowable retro review will only consider up to 90 days.

Abbreviations:

QMCSO – Qualified Medical Child Support Order

TPA – Third Party Administrator

Please note:

Additional documentation may be needed requests are handled on a case-by-case basis. Providing the outlined required documentation does not guarantee approval.

Exception Form

Subscriber Retroactive Cancel/Add/Change

Instructions: Group leader or group representative to complete this form to request an approval for subscriber retroactive cancels, additions, or changes that are beyond the Excellus BlueCross BlueShield retroactive guidelines and/or beyond contract terms. Complete all the information and send it to the Enrollment department.

Today's date: ____________________

Group name: ____________________

Group number: ____________________

Sales representative: ____________________

Member name: ____________________

Member ID: ____________________

Retroactive activity request (select only one): ☐ Cancel ☐ Add ☐ Change

Date of original denial: ____________________

Requested retroactive activity date(s): ____________________

Reason/description for dispute: ____________________

How was proper information sent to Excellus BlueCross BlueShield within required time frame? Proof is required.

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Please explain:

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Other, please explain:

____

Group administrator signature ____________________

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