



Employer Enrollment Tool

Small Group Renewal

Last updated October 2024



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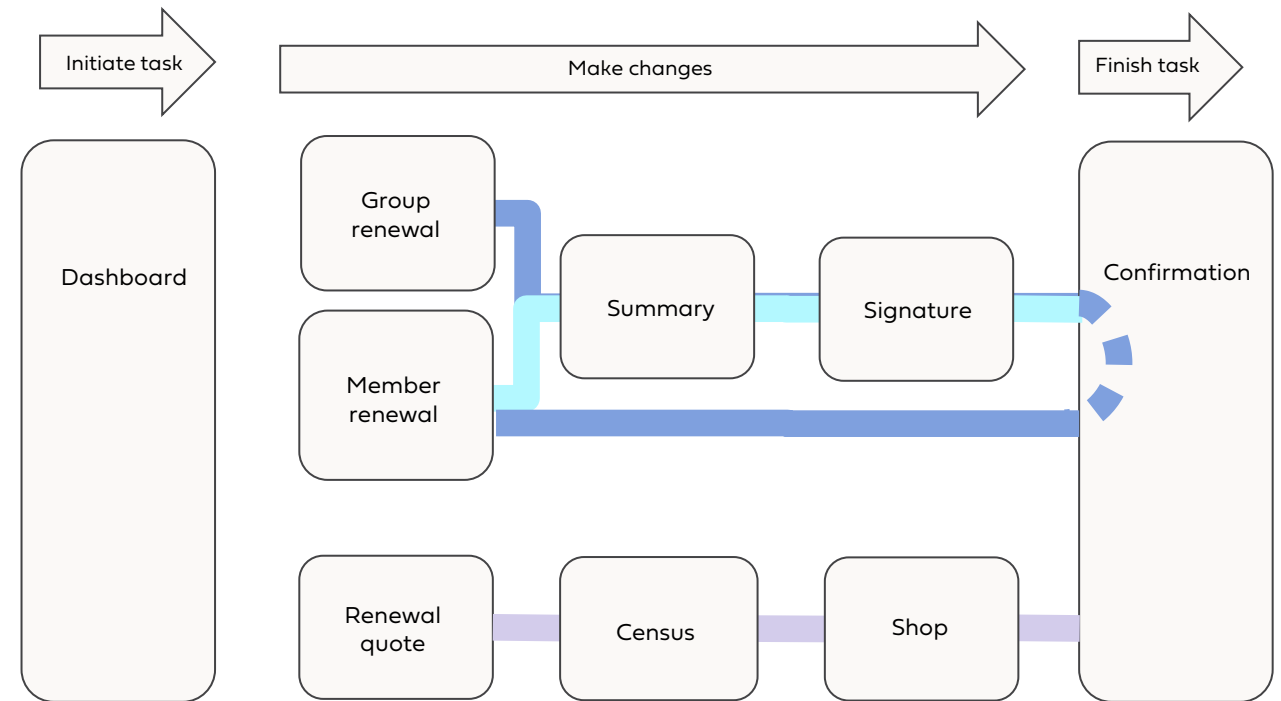
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Visit the Employer Enrollment Tool resource page on blueshieldca.com/broker to access additional tool resources, training videos, and enrollment guidelines.

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.

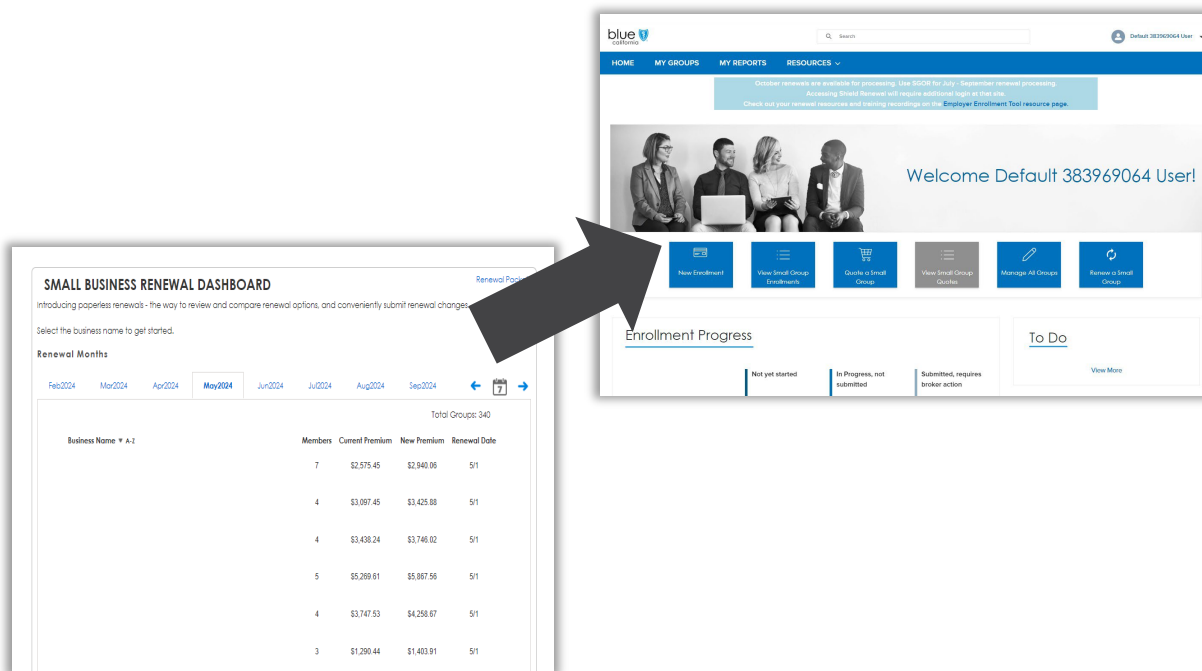
Feature	SGOR	Employer Enrollment tool
Renewal Book of Business	✓	✓
Real time group data and subscriber roster		✓
Guided Flow		✓
Transaction Summary		✓
Transaction Confirmation #	✓	✓
Transaction Log		✓
Submission Reports	✓	✓
Email Renewal changes	✓	✓
Resume Renewal Check out*	✓	

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.



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

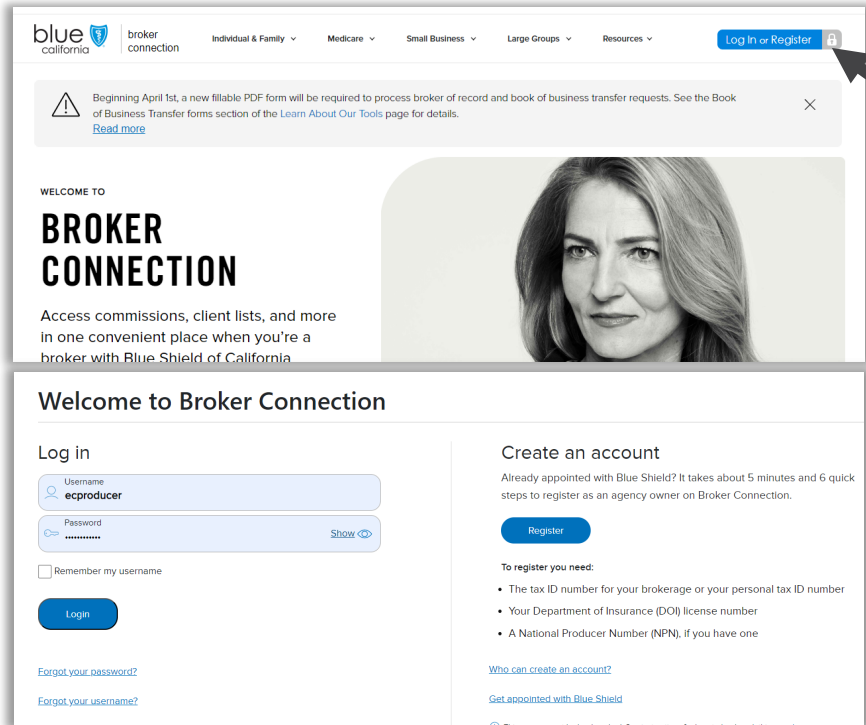


If no action is taken or changes submitted, Blue Shield will assume consent and the group will be automatically renewed into the plans suggested in their renewal notice



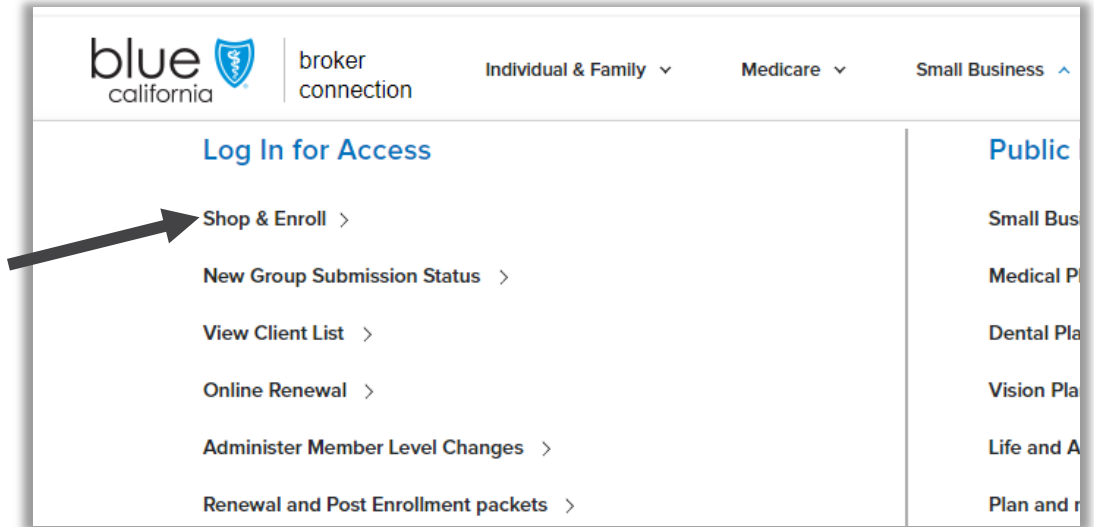
Active members whose plan is canceled have 60 days to enroll in a new plan or coverage will be terminated

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 displays the Blue Shield of California EET (Employer Enrollment Tool) homepage. At the top, the Blue Shield logo is on the left, a search bar is in the center, and the user's name 'Default 383969064 User' is on the right. Below the header is a blue navigation bar with links: HOME, MY GROUPS, MY REPORTS, and RESOURCES (with a dropdown arrow). A light blue banner below the navigation bar contains the following 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 and talking. To the right of the image, the text 'Welcome Default 383969064 User!' is displayed. Below the image is a row of six blue buttons with white icons and text: 'New Enrollment' (calendar icon), 'View Small Group Enrollments' (list icon), 'Quote a Small Group' (shopping cart icon), 'View Small Group Quotes' (list icon), 'Manage All Groups' (pencil icon), and 'Renew a Small Group' (refresh icon). Below the buttons is a section titled 'Enrollment Progress' with a horizontal bar chart showing three stages: 'Not yet started', 'In Progress, not submitted', and 'Submitted, requires broker action'. To the right of the 'Enrollment Progress' section is a 'To Do' section with a 'View More' link.

blue shield of california

Search

Default 383969064 User

HOME MY GROUPS MY REPORTS RESOURCES

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.

Welcome Default 383969064 User!

New Enrollment View Small Group Enrollments Quote a Small Group View Small Group Quotes Manage All Groups Renew a Small Group

Enrollment Progress

To Do

View More

Not yet started In Progress, not submitted Submitted, requires broker action

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 in a new browser tab.

The screenshot shows the renewal dashboard for July 2024. The top navigation bar includes 'HOME', 'MY GROUPS', 'MY REPORTS', and 'RESOURCES'. Below this, a timeline of months from July 2024 to June 2025 is displayed, with July 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.' The dashboard features a search bar, dropdowns for 'Renewal Status' and 'Open Enrollment Status', and an 'Access Shield Renewal' button. A table lists 5 groups with columns for 'Make a Change', 'Renew As Is', '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 'Make a Change' dropdown for the first group is open, showing options: 'Start Renewal', 'Start Open Enrollment', and 'Run a Quote'.

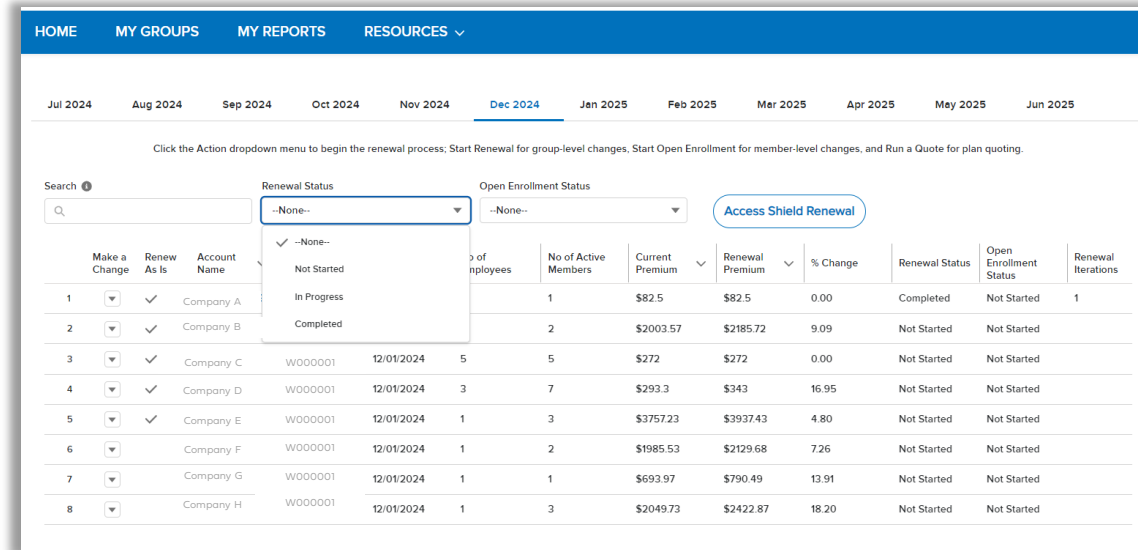
	Make a Change	Renew As Is	Account Name	Group ID	Renewal Date	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼		Company A	W000001	07/01/2024	1	4	\$2414.97	\$2784.14	15.29	Not Started	Not Started	
	Start Renewal												
	Start Open Enrollment												
	Run a Quote												
			Company B	W000001	07/01/2024	1	1	\$1663.03	\$1882.54	13.20	Not Started	Not Started	
			Company C	W000001	07/01/2024	5	5	\$431.5	\$431.5	0.00	Not Started	Not Started	
			Company D	W000001	07/01/2024	1	2	\$108.9	\$108.9	0.00	Not Started	Not Started	
5	▼		Company E	W000001	07/01/2024	11	29	\$23005.74	\$31912.33	38.71	Not Started	Not Started	

The screenshot shows the renewal dashboard for December 2024. The top navigation bar is the same. The timeline now highlights December 2024. The same message and search filters are present. The table now lists 8 groups. The 'Make a Change' dropdown for the first group is open, showing options: 'Start Renewal', 'Start Open Enrollment', and 'Run a Quote'. The 'Renewal Status' for the first group is 'Completed'.

	Make a Change	Renew As Is	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
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
	Start Renewal												
	Start Open Enrollment												
	Run a Quote												
			Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
			Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
			Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▼	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼		Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

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, renew as is marker, renewal status, and open enrollment status



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.

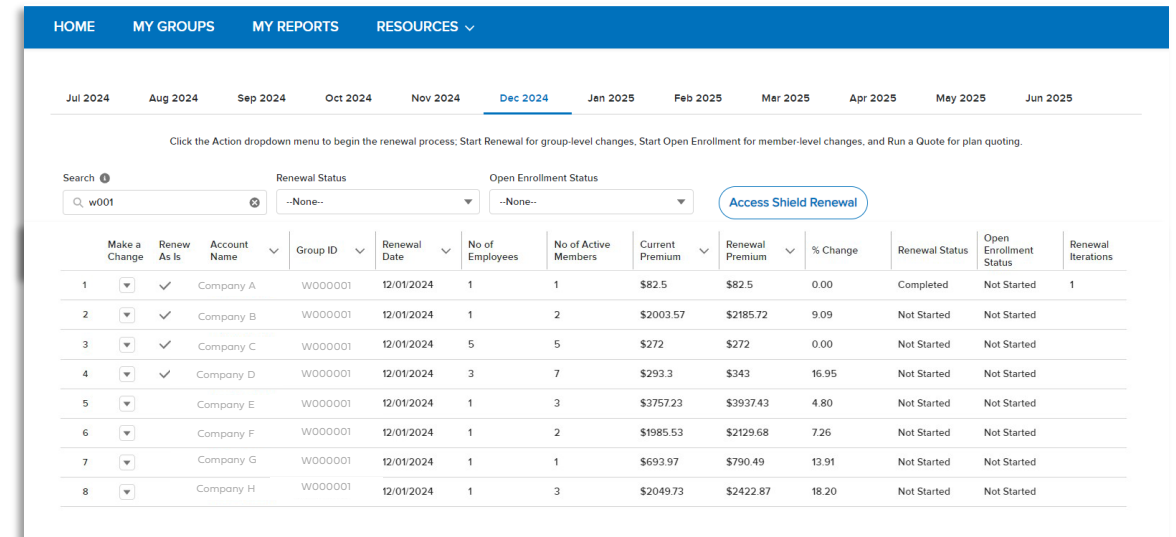
Search

Renewal Status: --None--

Open Enrollment Status: --None--

[Access Shield Renewal](#)

	Make a Change	Renew As Is	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
1			Company A					\$82.5	\$82.5	0.00	Completed	Not Started	1
2			Company B					\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3			Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4			Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5			Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6			Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7			Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8			Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	



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 w001

Renewal Status: --None--

Open Enrollment Status: --None--

[Access Shield Renewal](#)

	Make a Change	Renew As Is	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
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3			Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4			Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5			Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6			Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7			Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8			Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Leverage the dashboard

Leverage the renewal dashboard as your own book of business tracker with the renew as is, renewal status, and open enrollment status columns.

Managing passive renewal clients

- A simple check mark next to the group name lets you know which groups are renewing as is – without changes – this renewal period.

How

- Click into the renew as is column, check the box to renew as is, click the Save button.

HOME MY GROUPS MY REPORTS RESOURCES ▾

Jul 2024 Aug 2024 Sep 2024 Oct 2024 Nov 2024 **Dec 2024** Jan 2025 Feb 2025 Mar 2025 Apr 2025 May 2025 Jun 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 --None-- Open Enrollment Status --None-- [Access Shield Renewal](#)

	Make a Change	Renew As Is	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
1	▾	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▾	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▾	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	▾	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▾	✓	Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▾	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▾	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▾	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

HOME MY GROUPS MY REPORTS RESOURCES ▾

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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 --None-- Open Enrollment Status --None-- [Access Shield Renewal](#)

	Make a Change	Renew As Is	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
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2	▾	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▾	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
4	▾	✓	Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
5	▾	<input type="checkbox"/> Renew As Is			12/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▾	✓	Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▾	✓	Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▾	✓	Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

Leverage the dashboard

Managing active renewal clients

- The dashboard status columns display the submission status of your changes made in EET.

How:

- The status will automatically update in real time as your submissions are installed.

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.

	Make a Change	Renew As Is	Account Name	Renewal Status	Open Enrollment Status	No of Employees	No of Active Members	Current Premium	Renewal Premium	% Change	Renewal Status	Open Enrollment Status	Renewal Iterations
1	▼	✓	Company A	Completed	Not Started	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	Completed	Not Started	2	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
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8	▼		Company H	Not Started	Not Started	1	3	\$2049.73	\$2422.87	18.20	Not Started	Not Started	

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

HOMEMY GROUPSMY REPORTSRESOURCES

Jul 2024Aug 2024Sep 2024Oct 2024Nov 2024Dec 2024Jan 2025Feb 2025Mar 2025Apr 2025May 2025Jun 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--None--

Open Enrollment Status--None--

Access Shield Renewal

	Make a Change	Renew As Is	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
1		✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
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	Start Open Enrollment		Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
	Run a Quote		Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
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8			Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	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 4300/40 + Child Dental
Medical deductible	In-network	\$6,300
Out-of-pocket maximum	In-network	\$9,100
Pharmacy deductible	In-network	\$500
Copayment	In-network	\$40
Emergency room	In-network	40%
Inpatient hospitalization	In-network	40%
Urgent care	In-network	\$40
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 form is titled 'Employer Information' and includes a brief instruction: '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 as follows:

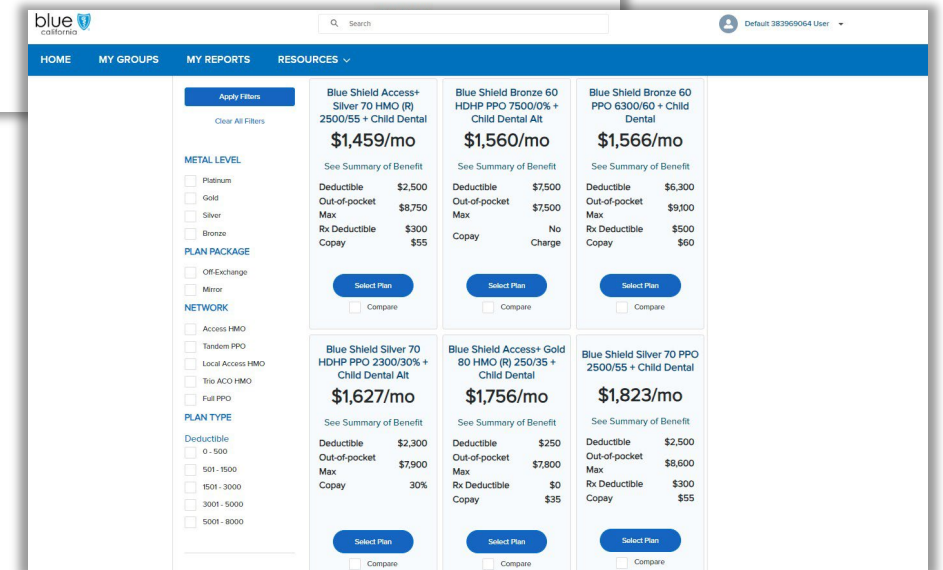
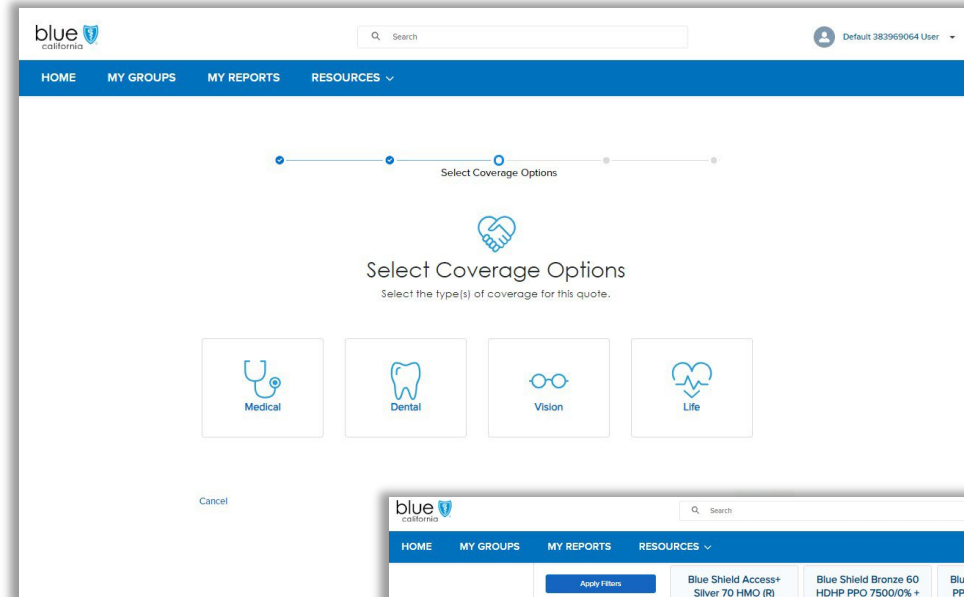
- Effective Date:** May 1 2024
- Name of Business:** COMPANY O
- Number of Eligible Employees ***: (empty field)
- Zip Code ***: 94607
- Federal Tax Identification (TID) number (Optional)**: 123456789
- SIC Code (Optional)**: 8049 Offices and Clinics of Health Practitioners n.e.c

Renewal quotes

-
- The screenshot displays two overlapping windows. The background window is the 'Employer Census' page on the bluecalifornia.org website. It features a navigation bar with links to HOME, MY GROUPS, MY REPORTS, and RESOURCES. A progress indicator shows 'Employer Census' as the current step. Below the title, there's a button to 'Download census template'. A summary box shows counts for different categories: Total Insured (1), Employee Only (1), Employee+Child (0), Employee+Spouse (0), and Employee+Family (0). At the bottom, there are buttons for 'Clear All', 'Upload Census', and 'Add an employee'. Below these is a form with fields for First Name, Last Name, Birthdate, Age, Medical Status, Dental Status, Vision Status, Subscriber Zip, Gender, Salary, and Relationship.
- The foreground window is a Microsoft Excel spreadsheet titled 'QCU_Upload_Template'. It has a standard ribbon menu with tabs like File, Home, Insert, Page Layout, Formulas, Data, Review, View, Automate, Help, and Acrobat. The 'Home' tab is active, showing options for Clipboard, Font, Alignment, Number, and Conditional Formatting. The spreadsheet grid starts with column headers A through L and row numbers 1 through 18. The first row contains bolded headers: First Name, Last Name, Birthdate, Age, Medical Status, Dental Status, Vision Status, Subscriber Zip, Gender, Salary. The second row contains sample data: First Name, Last, 1/1/1964, 60, EE, EE, EE.

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

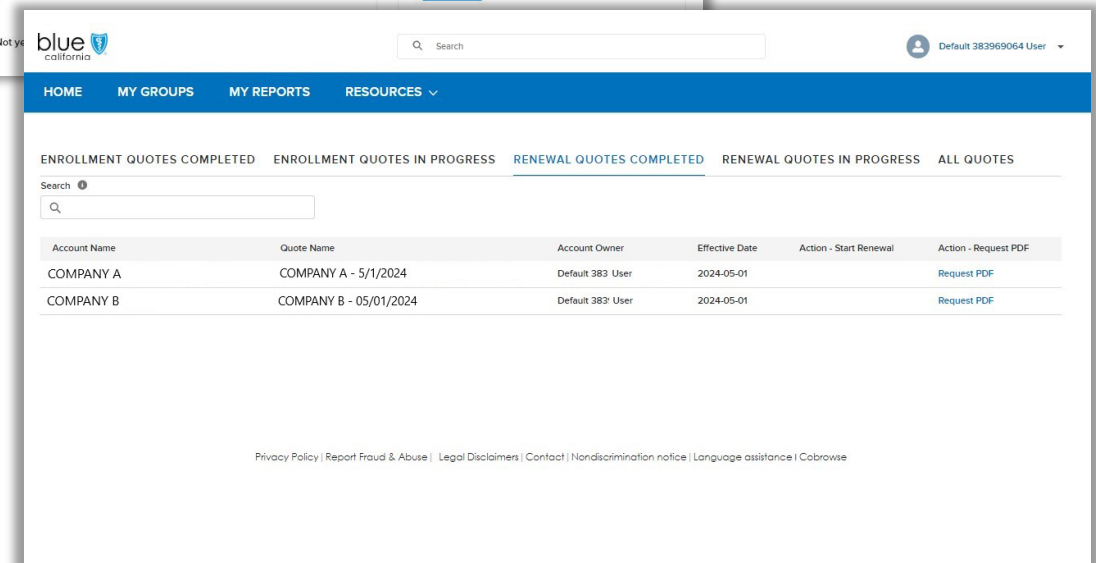
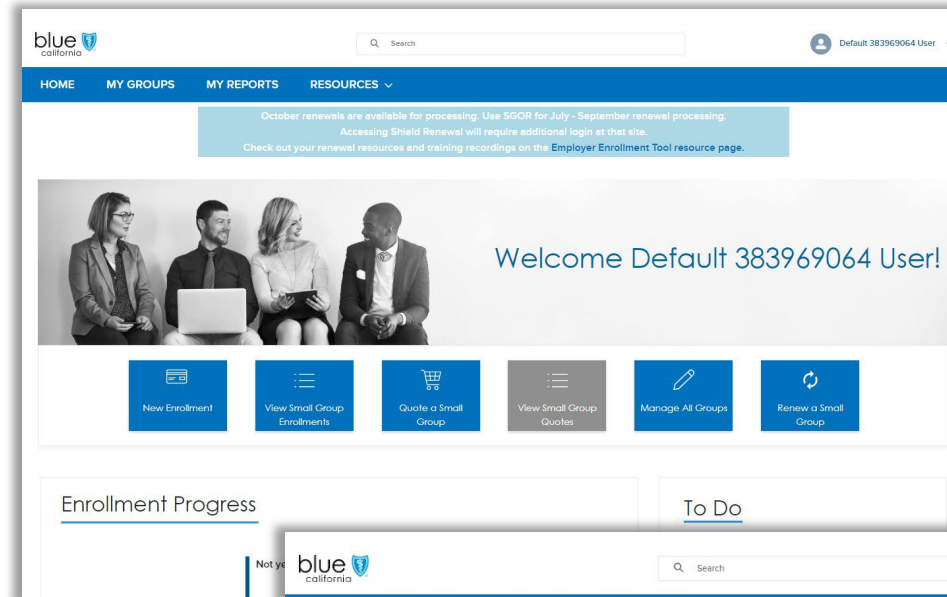
- The Employer Contributions section will cover all products being quoted
 - This section is not required during the quoting phase
- The completed quote can be downloaded, emailed securely, or the user can proceed by clicking Continue to Enrollment
 - CSV downloads and emails are available immediately.
 - 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 image displays two screenshots of the Blue Shield of California website interface. The top screenshot shows the 'Employer Contributions' section, which includes a progress bar at the top with five steps, the fourth of which is highlighted. Below the progress bar is a large blue dollar sign icon and the heading 'Employer Contributions'. The text below the heading reads: 'Enter the employer contributions for the products and coverage being quoted'. The form is divided into two columns: 'Medical' and 'Dental'. Each column has an 'Employee Contribution' section with a '\$' and '%' input field and an 'Enter a number' prompt, and a 'Dependent Contribution' section with a similar input field and prompt. A 'Cancel' button is located at the bottom left of the form. The bottom screenshot shows the 'Your Completed Quote' section. It features a progress bar with six steps, the sixth of which is highlighted. Below the progress bar is a document icon and the heading 'Your Complete Quote'. The text below the heading reads: 'Here is your quote. 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.' Below this text are three options: 'Send quote CSV via secure email' (with an envelope icon), 'Download CSV file' (with a download icon), and 'Request PDF' (with a document icon). A blue button labeled 'Return to Group Renewals' is at the bottom.

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 is a navigation bar with links: HOME, MY GROUPS, MY REPORTS, and RESOURCES. Below this is a timeline from Jul 2024 to Jun 2025, with Dec 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 are filters for Search, Renewal Status (set to --None--), and Open Enrollment Status (set to --None--). A button labeled "Access Shield Renewal" is on the right. The main table lists renewal data for eight companies. For Company C (row 3), the "Make a Change" dropdown menu is open, showing options: "Start Renewal", "Start Open Enrollment", and "Run a Quote".

	Make a Change	Renew As Is	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
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
3	▼	✓	Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
	Start Renewal												
	Start Open Enrollment												
	Run a Quote												
7	▼		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	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.

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Search

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Renewal Information

It's time to renew

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

No of employees	9
No of covered members	7
No of covered dependents	0
Infertility Rider	No
Total premium	\$100

Renewal Year

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

Dental Premium: \$0

Diamond DPPO/\$3000/U95/Adult+Child Ortho

Gold DPPO/\$2000/U90/Adult+Child Ortho

Dental Premium: \$0

% Change: n/a

Diamond DPPO/\$3000/U95/Adult+Child Ortho

Gold DPPO/\$2000/U90/Adult+Child Ortho

Vision Premium: \$0

Preferred Vision Plus for Small Business 10/25/

Ultimate Vision Plus for Small Business 10/25/1

Vision Premium: \$0

% Change: n/a

Preferred Vision Plus for Small Business 10/25/

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

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Renewal Information

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No of covered dependents	0
Infertility Rider	No
Total premium	\$105
% Change	5%

Dental Premium: \$0

Diamond DPPO/\$3000/U95/Adult+Child Ortho

Gold DPPO/\$2000/U90/Adult+Child Ortho

Dental Premium: \$0

% Change: n/a

Diamond DPPO/\$3000/U95/Adult+Child Ortho

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Ultimate Vision Plus for Small Business 10/25/1

Vision Premium: \$0

% Change: n/a

Preferred Vision Plus for Small Business 10/25/

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.

The image displays two screenshots of the Blue Shield of California Group Renewal Updates interface. The top screenshot shows the 'Group Renewal Updates' page with the 'Select all' button highlighted. The bottom screenshot shows the same page with the 'Deselect all' button highlighted, and the 'Next', 'Previous', and 'Cancel' buttons are visible at the bottom.

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Group renewal updates

Group Renewal Updates

Select all or individual sections to update for the renewal contract.

Select all

☐ Class Offerings

☐ Plan Selections

☐ Employer Contribution

☐ Waiting Period

Next

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Group renewal updates

Group Renewal Updates

Select all or individual sections to update for the renewal contract.

Deselect all

☒ Class Offerings

☒ Plan Selections

☒ Employer Contribution

☒ Waiting Period

Next

Previous

Cancel

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 a user profile dropdown 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' and 'Check the box to select an available class to be added to the group. Classes already offered cannot be re-selected.' Below this, a section titled 'The group currently offers the classes listed in the table' shows two rows: 'ACTIVE CA ELIGIBLES' and 'ACTIVE OOS ELIGIBLES'. At the bottom, there is a list of checkboxes for selecting new classes: 'Active out of state employees', 'COBRA California members', 'COBRA out of state members', and a radio button for 'No changes are needed'.

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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.

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Select Dental Coverage

Make the group plan selections

To add a plan, select the plan package or option to view the networks and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the blue Cancel link in the renewal plan table. Select and use the arrows to move the plan name into the canceled plan label.

Renewal Plans

- Diamond DPPO/\$3000/U95/Adult-Child Ortho
- Gold DPPO/\$2000/U90/Adult-Child Ortho

Cancel Plans

Select Dental Plan Option *

Single Dual Choice Triple Choice

☐ No changes are needed

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Select Dental Coverage

Make the group plan selections

To add a plan, select the plan package or option to view the networks and plans available to the group. Use the check boxes to indicate plans the group will offer. To cancel a plan, click on the blue Cancel link in the renewal plan table. Select and use the arrows to move the plan name into the canceled plan label.

Renewal Plans

Canceled Plans

- Diamond DPPO/\$3000/U95/Adult-Child Ortho
- Gold DPPO/\$2000/U90/Adult-Child Ortho

Select Dental Plan Option *

Single Dual Choice Triple Choice

AVAILABLE PLANS

Dental HMO Plan

- ☒ Dental HMO Basic
- ☐ Dental HMO Plus
- ☐ Dental HMO Deluxe
- ☐ Dental HMO Voluntary
- ☐ Dental HMO Standard

Dental PPO Plan

- ☒ Bronze DPPO/\$1500/MAC
- ☐ Bronze DPPO/\$1500/MAC/Child Only Ortho
- ☐ Gold DPPO/\$1500/MAC
- ☐ Gold DPPO/\$1500/MAC/Adult-Child Ortho
- ☐ Gold DPPO/\$2000/MAC
- ☐ Gold DPPO/\$2000/MAC/Adult-Child Ortho
- ☐ Bronze DPPO/\$1000/MAC

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.

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Employer Contribution

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.

Employer Contributions

Choose the details you would like to modify

☒ Medical

Medical **Subscriber Contribution**

\$ % Enter a number* 100

Dependent Contribution

\$ % Enter a number* 0

☐ 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 in the top right. The main content area is titled 'Eligibility Options' and includes instructions: '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 selector 'Effective first of the month following date ...'. At the bottom, there is a radio button option 'No changes are needed'. Navigation buttons 'Next', 'Previous', and 'Cancel' are located at the bottom right.

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Eligibility Options

Enter the new eligibility information in the respective section.
Required fields must be completed before moving forward.

▼ Waiting Period

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.

ACTIVE CA ELIGIBLES Effective first of the month following date ... ▼

ACTIVE OOS ELIGIBLES Effective first of the month following date ... ▼

☐ No changes are needed

Next
Previous
Cancel

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

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.

	Make a Change	Renew As Is	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
1	▼	✓	Company A	W000001	12/01/2024	1	1	\$82.5	\$82.5	0.00	Completed	Not Started	1
2	▼	✓	Company B	W000001	12/01/2024	1	2	\$2003.57	\$2185.72	9.09	Not Started	Not Started	
	Start Renewal												
	Start Open Enrollment												
	Run a Quote												
			Company C	W000001	12/01/2024	5	5	\$272	\$272	0.00	Not Started	Not Started	
			Company D	W000001	12/01/2024	3	7	\$293.3	\$343	16.95	Not Started	Not Started	
			Company E	W000001	12/01/2024	1	3	\$3757.23	\$3937.43	4.80	Not Started	Not Started	
6	▼		Company F	W000001	12/01/2024	1	2	\$1985.53	\$2129.68	7.26	Not Started	Not Started	
7	▼		Company G	W000001	12/01/2024	1	1	\$693.97	\$790.49	13.91	Not Started	Not Started	
8	▼		Company H	W000001	12/01/2024	1	3	\$2049.73	\$2422.87	18.20	Not Started	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.

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Renewal Information

It's time to renew

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

No of employees

9

No of covered members

7

No of covered dependents

0

Infertility Rider

No

Total premium

\$100

Renewal Year

No of employees

9

No of covered members

7

No of covered dependents

0

Infertility Rider

No

Total premium

\$105

% Change

5%

Dental Premium: \$0

Diamond DPPO/\$3000/U95/Adult+Child Ortho

Gold DPPO/\$2000/U90/Adult+Child Ortho

Dental Premium: \$0

% Change: n/a

Diamond DPPO/\$3000/U95/Adult+Child Ortho

Gold DPPO/\$2000/U90/Adult+Child Ortho

Vision Premium: \$0

Preferred Vision Plus for Small Business 10/25/

Ultimate Vision Plus for Small Business 10/25/1

Vision Premium: \$0

% Change: n/a

Preferred Vision Plus for Small Business 10/25/

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.

The image displays two overlapping screenshots of the Blue Shield of California Open Enrollment Updates interface. The top screenshot shows the 'Open Enrollment Updates' section with a 'Select All' button and two unchecked checkboxes: 'Terminate employees' and 'Member plan changes'. The bottom screenshot shows the same interface but with the 'Deselect All' button and 'Next'/'Previous' navigation buttons. The 'Next' button is highlighted in blue, and the 'Previous' button is outlined. The 'Deselect All' button is also outlined. The 'Terminate employees' and 'Member plan changes' checkboxes are now checked.

Open Enrollment cancel

- Use the toggle button to select Enter Terminations
- Select the members and enter their cancelation details in the table
- Use the check box next to the member's name to select them for cancelation.
 - For larger rosters, use the name or ID search to quickly find and select members
- Next, provide the cancelation 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

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employee's name from the group roster below then provide the cancelation 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

1234

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

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Apply to all Selected Employees

Member Name Member ID

1234

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

Member B 123456789 Select an Option Select an O... Select an Option

Member C 123456789 Select an Option Select an O... Select an Option

May 2024

28 29 30 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 1

2 3 4 5 6 7 8

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

Terminate Employees

Cancel coverage for multiple employees at once. Any dependents associated with the employees will also be canceled from coverage.

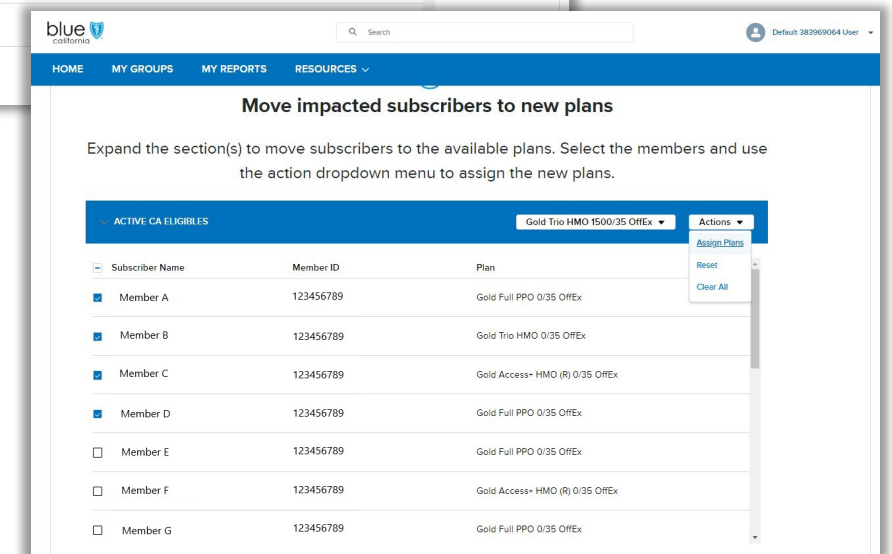
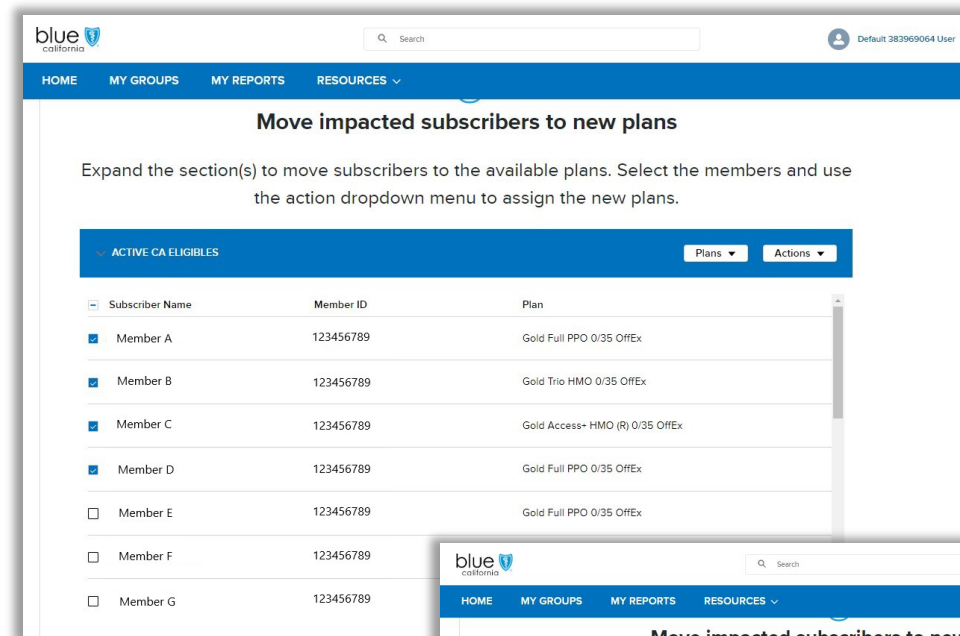
Upload File

BlueShield_EET_MassTermination.csv

	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

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





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?

- Chat us!
- Small Group Broker Services
(800) 559-5905