

# Quick Start Guide

QUOTE, ENROLLMENT, AND BILLING  
TOOL FOR SMALL GROUP

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# Dashboard

- Log into the system or click the Dashboard link within the global navigation

The screenshot shows the Premera Mile Cross dashboard interface. At the top, there is a navigation bar with the Premera logo and user information 'Hi, Richard'. Below this is a search bar with the text 'Search for people or companies...'. The main content area is divided into several sections:

- Your activity snapshot:** This section contains three cards: 'New business' (4 groups, 0 recently sold, 2 nearing effective date), 'Renewals' (0 groups, 0 increased +10%, 0 nearing effective date), and 'All accounts' (4 groups, \$0.00 past due (0 groups)). Each card includes a donut chart showing the distribution of activity types.
- Recent updates:** A section indicating 'No updates to display.'
- Resources:** A list of links including Reports, Marketing, Training, Glossary, and Underwriting guidelines.
- Work queue:** A section titled 'Work queue' with a 'Quick Filters' dropdown and a 'Create group quote' button. It displays a warning: 'You have 2 items that require action.' Below this are filter counts for Quoting (0), Proposal (0), Enrolling (3), In review (1), Final rates review (0), and Final rates ready (0). A table entry for 'Seattle Boat Tours' is shown with details like 'Quote...5386ed', 'April 01, 2021', '2 employees', 'S4', and 'Richard Hughes', along with an 'ENROLLING' status and a 'Resume >' button.

Callouts in the image point to the following features:

- Search
- Dashboard
- Create group quote
- Recent activities
- Help
- User Profile, Account Settings
- Activity type
- Quick Filters

- Global navigation:
  - create a group quote
  - view recent activities
  - view Help information
  - view user profile/account settings

- Search
  - Ability to search for existing people or companies using Search field
- Your activity snapshot
  - view activity snapshots by activity type (New business, Renewals and All accounts), market segment (IFP or Group) and status
- Recent updates
  - Displays activities recently updated with date, time, type of update, user and link to that record.
- Resources
  - Reference links to carrier provided material
- Work queue
  - Create IFP quote
  - Create group quote
  - Activity type
    - Quick access to the activity type you wish to review; New business or Renewals
  - Quick filters
    - Allows you to quickly filter results of your work queue by the current status.
    - Status displayed will vary based on the Activity type selected
  - View
    - Allows you to view just group activities, just IFP activities or All activities
  - Advanced filters
    - Provides more detailed filter criteria

Please use a comma between multiple contacts or locations.

<b>Company</b>	<b>Primary applicant name</b>	<b>Contact</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Locations</b>		
<input type="text"/>		
<b>Created</b>	<b>Effective date</b>	<b>Total census</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
	to	to
	<input type="text"/>	<input type="text"/>
<b>Activity</b>		
Excludes end status activities		
<input type="checkbox"/> Quoting (9) <input type="checkbox"/> Proposal (4) <input type="checkbox"/> Enrolling (23) <input type="checkbox"/> In review (1) <input type="checkbox"/> Final rates review (2) <input type="checkbox"/> Final rates ready (0)		
<input type="button" value="Clear all filters"/>		<input type="button" value="Hide advanced filters"/>

# Create a Group Quote

- Access the Dashboard
- Click 'Create group quote' icon or link from the Dashboard

The screenshot displays the Premera dashboard interface. At the top, there is a navigation bar with the Premera logo, a search bar, and user information. Below this is a 'Your activity snapshot' section with three main cards: 'New business' (4 groups, 0 recently sold, 2 nearing effective date), 'Renewals' (0 groups, 0 increased +10%, 0 nearing effective date), and 'All accounts' (4 groups, \$0.00 past due, 0 groups). Each card includes a donut chart showing the distribution of items across different stages. Below the snapshot is a 'Work queue' section with a 'Create group quote' button highlighted by a blue arrow. The work queue also shows a warning about 2 items requiring action and a list of items, including 'Seattle Boat Tours' which is in the 'ENROLLING' stage.

**PREMERA**  
HUGO CROSS

Hi, Richard

**Search and manage your work.**

Search for people or companies...

Your activity snapshot

**New business**  
4  
4 Group  
0 recently sold  
2 nearing effective date

Enrolling: 3  
Review: 0  
Proposal: 0  
Quoting: 1

**Renewals**  
0  
0 Group  
0 increased +10%  
0 nearing effective date

**All accounts**  
4  
4 Group  
\$0.00 past due (0 groups)

Prospect: 4  
Inactive: 0  
Active: 0

Recent updates  
No updates to display.

Resources  
Reports  
Access Broker Reports  
Marketing  
HMO plans  
BenefitsPlace products  
Training  
Glossary  
User guide  
Underwriting guidelines  
Dental  
Life

Work queue

Create group quote

New business Renewals

⚠ You have 2 items that require action.

Sort by:

Quoting (0) Proposal (0) Enrolling (3) In review (1)  
Final rates review (0) Final rates ready (0)

Advanced filters

Seattle Boat Tours ENROLLING ⚠

Quote...5386ed	April 01, 2021	2 employees	S4 Richard Hughes	Resume >
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## Quote Questions

- Answer the preliminary quote questions and click 'Submit'

**PREMERA** BLUE CROSS

Quote

\* Can the group attest to averaging at least 1 but no more than 50 employees on payroll during the previous calendar year and that it is not a sole proprietor with no common law employee or a self-employed individual?

Yes  No

\* Is your company headquartered in Washington State? If no, is there a Washington employee with authority to sign the group contract?  
Note: Premera is not licensed to quote or sell within Clark County Washington

Yes  No

**Note:** Required information is denoted by a red asterisk (\*)

# Profile

- Enter Profile information and click 'Continue to census' button

The screenshot shows the 'Quote' page in the Premera Blue Cross system. The page is divided into four main sections: Profile, Census, Plans, and Proposal. The 'Profile' section is currently active and contains the following information:

- Quote information:**
  - \* Requested effective date: Select...
  - Quote name: [Empty text box]
  - Quote ID: ---
- Assignment:**
  - Broker: Richard Hughes
  - Agency: S4
  - Sales representative: ---
- Company information:**
  - \* Company name: [Empty text box]
  - \* ZIP code (primary location): Search...
- Employees:**
  - \* Total enrolled: [Empty text box]
  - \* Total employed: [Empty text box]

At the bottom of the page, there is a navigation bar with a '< Back to dashboard' link on the left and a 'Continue to census >' button on the right. A blue arrow points to the 'Continue to census >' button.

## Census

- Enter Census information
  - Enter directly into Census screen

The screenshot shows the Premera Blue Cross 'Quote' interface. At the top, there's a navigation bar with the Premera logo and user information 'Hi, Richard'. Below this is a 'Quote' header with a search bar. A main navigation bar contains four tabs: 'Profile', 'Census', 'Plans', and 'Proposal'. The 'Census' tab is active, showing 'Add employees...'. Below the navigation bar, there's a 'Withdraw quote' link. The main content area has a heading 'You have options. Decide how much information you would like to enter up front or leave for enrollment.' followed by a section 'Eligible products for the group' with checkboxes for Medical, Dental, Vision, Ortho, and TMJ. Below that is a section 'Complete the census' with the question 'Who will complete the census?' and two radio buttons: 'You' (selected) and 'Employer'. Underneath, there are two options: 'Option 1: Download and upload' with 'Download template' and 'Upload census' buttons, and 'Option 2: Manual entry' with a 'Manual entry' button. A blue arrow points to the 'Manual entry' button. At the bottom, there are links for '< Back to profile' and 'Continue to plans >'.

- Click 'Manual entry' button



## Add employee ✕

\* Indicates required

**First name**      **Middle name**      **Last name**

\_\_\_\_\_

**\* Gender**      **\* Date of birth**      **\* Employment**

   
 mm/dd/yyyy 
    
 Active

**Hire date**      **SSN**

mm/dd/yyyy       \_\_\_\_-\_\_\_\_-\_\_\_\_

**Address 1**      **Address 2**

\_\_\_\_\_

**ZIP code**


98103  Seattle, WA (King)

**Home phone**      **Email address**

( ) \_\_\_\_-\_\_\_\_      \_\_\_\_\_

Coverage

**Medical**      **Dental**

ES       ES  


Dependents


**First name**      **Middle name**      **Last name**

\_\_\_\_\_

**\* Relationship**      **\* Date of birth**      **\* Gender**     

\_\_\_\_\_       mm/dd/yyyy      





- Enter employee information
- If there are dependents, select the appropriate coverage for each product line, click 'Add dependent' and enter dependent information
- Click 'Add another employee' until all employees are entered

- Once all employees have been entered, click 'Save and exit' button
- Import from provided Excel template

The screenshot shows the Premera Blue Cross 'Quote' interface. The top navigation bar includes the Premera logo, a search bar, and a user profile for 'Hi, Richard'. The main content area is divided into four tabs: Profile, Census, Plans, and Proposal. The 'Census' tab is active, displaying 'Add employees...'. Below the tabs, there is a 'Withdraw quote' button. The main content area contains a section titled 'You have options. Decide how much information you would like to enter up front or leave for enrollment.' This section includes a list of 'Eligible products for the group' (Medical, Dental, Vision, Ortho, TMJ) and a 'Complete the census' section. The 'Complete the census' section asks 'Who will complete the census?' with 'You' and 'Employer' options. Below this, there are two options: 'Option 1: Download and upload' and 'Option 2: Manual entry'. Under 'Option 1', there are 'Download template' and 'Upload census' buttons. Under 'Option 2', there is a 'Manual entry' button. A blue arrow points to the 'Upload census' button. At the bottom left, there is a '< Back to profile' link, and at the bottom right, there is a 'Continue to plans >' button.

- Click on 'Upload census' button
  - Select file

PREMERA BLUE CROSS

Hi, Richard

# Quote

Search for people or companies

- Profile**  
Quote: .....1a50a7  
06/01/2021  
2/2 eligible
- Census**  
5 products  
2 employees  
0 dependents
- Plans**  
Add your plans...
- Proposal**  
Select what to send...

[Withdraw quote](#)

You have options. Decide how much information you would like to enter up front or leave for enrollment.

Eligible products for the group

Medical  Dental  Vision  Ortho  TMJ

Complete the census  
2 employees | 0 dependents | 5 products  
Last updated by Richard Hughes on 03/23/2021 1:11 PM

[Add employee](#) | [Export census](#) | [Replace census](#)

Filter by name, age, ZIP, status or cr.  Attention required (0) Sort by:

Employee	ZIP	Status	Dependents	Coverage
anderson, amy <a href="#">Remove</a> <a href="#">Edit</a>				
F, 54	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE
bailey, bill <a href="#">Remove</a> <a href="#">Edit</a>				
M, 53	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE

[Back to profile](#) [Continue to plans](#)

- Click on 'Continue to plans' button

# Plans

**Quote**

Search for people or companies

**Profile**  
Quote.....1a50a7  
06/01/2021  
2/2 eligible

**Census**  
5 products  
2 employees  
0 dependents

**Plans**  
Add your plans...

**Proposal**  
Select what to send...

[Withdraw quote](#)

**PLANS ADDED TO QUOTE**  
0 plans added

**PLANS AVAILABLE**  
A medical plan must be quoted in order to quote other products. The final premiums will be calculated after employee elections.

[Generate proposal with all plans](#)

Medical Dental Vision Ortho TMJ

Showing 29 plans

Premium (monthly)	Individual Deductible (monthly)	Coinsurance	Individual Out-of-pocket maximum	PREMERA BLUE CROSS Premera Blue Cross	Balance 250 Platinum	Individual deductible (In-network/Out of network)	Family deductible (In-network/Out of network)	Individual OOP maximum (In-network/Out of network)	Family OOP maximum (In-network/Out of network)	Coinsurance	Premium (monthly)	Compare
						\$250 / \$500	\$500 / \$1,000	\$4,000 / Unlimited	\$8,000 / Unlimited	15% / 50%	\$1,816.88	<input type="checkbox"/>

- Select 'Generate proposal with all plans' link if you wish to download proposal data and then select Excel or PDF format

**national** Hi. marthabrokerupdate

**PLANS AVAILABLE**  
Add available plans below to your quote. A medical plan must be selected for each subgroup and must be quoted in order to quote other products.

Generate proposal with all plans ▾


Medical Dental Vision Life Short term disability Long term disability

Showing 15 plans

Plan Name	Deductible	Out-of-pocket maximum	Coinsurance	Premium (monthly)	Action
<b>national</b> HealthCare Co HDHP PPO 2000	\$2,000 / \$4,000	\$2,000 / \$4,000	10%	\$228.86	<input type="checkbox"/> Compare
<b>national</b> HealthCare Co HDHP PPO 4000	\$4,000 / \$8,000	\$4,000 / \$8,000	20%	\$257.38	<input type="checkbox"/> Compare

Filters on the left: Premium (monthly), Deductible (monthly), Coinsurance, Out-of-pocket max., Doctor visit, Specialist visit, Plan type, Metal tier. Clear filters.

- If you wish to Compare plans side by side, select the desired plan(s) to compare by checking the 'Compare' button for up to 3 plans and click on 'Compare # plans' button

PREMERA |  Hi, Richard

# Quote

Search for people or companies

**Profile**

Quote ID: 1150a7  
06/01/2021  
2/2 eligible

**Census**

5 products  
2 employees  
0 dependents

**Plans**

Add your plans...

**Proposal**

Select what to send...

[Withdraw quote](#)

[Back to plans](#)

**PREMERA**

**Balance 250 Platinum**

Monthly premium  
**\$1,816.88**

[View premium breakdown](#)

[Add to quote](#)

**PREMERA**

**Balance 500 Platinum**

Monthly premium  
**\$1,732.00**

[View premium breakdown](#)

[Add to quote](#)

**PREMERA**

**Balance 500 Gold**

Monthly premium  
**\$1,497.74**

[View premium breakdown](#)

[Add to quote](#)

### Additional plan information

Plan details	<a href="#">View details</a>	<a href="#">View details</a>	<a href="#">View details</a>
Highlights of coverage	<a href="#">Plan highlights</a>	<a href="#">Plan highlights</a>	<a href="#">Plan highlights</a>

### In-network highlights

**Plan attributes**

Individual Deductible	\$250	\$500	\$500
Family Deductible	\$500	\$1,000	\$1,000
Coinsurance	15%	15%	20%
Individual Out of Pocket Maximum	\$4,000	\$5,000	\$8,550
Family Out of Pocket Maximum	\$8,000	\$10,000	\$17,100
Office Visit Cost Share	\$10 Copay designated PCP, apply to OOP Max; \$35 Copay Specialist, apply to OOP Max	\$10 Copay designated PCP, apply to OOP Max; \$35 Copay Specialist, apply to OOP Max	\$25 Copay designated PCP, apply to OOP Max; \$50 Copay Specialist, apply to the OOP Max
Annual Maximum	Unlimited	Unlimited	Unlimited

### Out-of-network highlights

**Plan attributes**

Individual Deductible	\$500	\$1,000	\$1,000
Family Deductible	\$1,000	\$2,000	\$2,000
Coinsurance	50%	50%	50%
Individual Out of Pocket Maximum	Unlimited	Unlimited	Unlimited
Family Out of Pocket Maximum	Unlimited	Unlimited	Unlimited
Office Visit Cost Share	\$500 Deductible, then 50% Coinsurance, applies to Unlimited Out of Pocket Maximum	\$1,000 Deductible, then 50% Coinsurance, applies to Unlimited Out of Pocket Maximum	\$1,000 Deductible, then 50% Coinsurance, applies to Unlimited Out of Pocket Maximum
Annual Maximum	Unlimited	Unlimited	Unlimited

[Back to census](#)
[Continue to proposal](#)

- You can choose to add plans from the Compare plans page by clicking 'Add to quote' and then 'Continue to proposal' if desired
- Click 'Back to plans' link

PREMERA BLUE CROSS

Quote

Search for people or companies

Profile: Quote.....1a50a7, 06/01/2021, 2/2 eligible

Census: 5 products, 2 employees, 0 dependents

Plans: Add your plans...

Proposal: Select what to send...

Withdraw quote

PLANS ADDED TO QUOTE: 0 plans added

PLANS AVAILABLE: A medical plan must be quoted in order to quote other products. The final premiums will be calculated after employee elections. Generate proposal with all plans

Medical | Dental | Vision | Ortho | TMJ

Showing 29 plans

Search... Compare 3 plans

Individual deductible (In-network/Out of network)	Family deductible (In-network/Out of network)	Individual OOP maximum (In-network/Out of network)	Family OOP maximum (In-network/Out of network)	Coinsurance	Premium (monthly)	Compare
\$250 / \$500	\$500 / \$1,000	\$4,000 / Unlimited	\$8,000 / Unlimited	15% / 50%	\$1,816.88	<input checked="" type="checkbox"/>
\$500 / \$1,000	\$1,000 / \$2,000	\$5,000 / Unlimited	\$10,000 / Unlimited	15% / 50%	\$1,732.00	<input checked="" type="checkbox"/>
\$500 / \$1,000	\$1,000 / \$2,000	\$8,550 / Unlimited	\$17,100 / Unlimited	20% / 50%	\$1,497.74	<input checked="" type="checkbox"/>
\$1,000 / \$2,000	\$2,000 / \$4,000	\$8,100 / Unlimited	\$16,200 / Unlimited	20% / 50%	\$1,473.94	<input type="checkbox"/>

- Click 'Add' button for each desired plan for the initial product line

- If additional product lines were selected, click the tab for each product line, review and compare plans
- Click 'Add' button for each desired plan(s)

Individual deductible	Family deductible	Annual maximum	Preventive services	Basic services	Premium (monthly)	<input type="checkbox"/> Compare
\$50 / Shared with In Network	\$150 / Shared with In Network	\$1500 PCY / Shared with In Network	Covered in Full / Same as in-network cost share	Deductible, then 20% / Same as in-network cost share	\$88.00	

< Back to census Continue to proposal >

- Once all desired plans are selected for all product lines, click 'Continue to proposal' button



# Proposal

- Click 'View plans in quote' to view selected plans in a pop-up modal
- Click 'Generate plan comparison' to download an excel spreadsheet of all selected plans

The screenshot displays the Premera Blue Cross 'Quote' interface. At the top, there's a navigation bar with the Premera logo and user information 'Hi, Richard'. Below this is a search bar and a summary section with three tabs: Profile, Census, and Plans. The Profile tab shows quote details like 'Quote ...1a50a7', '06/01/2021', and '2/2 eligible'. The Census tab shows '5 products', '2 employees', and '0 dependents'. The Plans tab shows '2 medical selected', '1 dental selected', and '1 vision selected +2 more'. A 'Proposal' dropdown menu is open, showing 'Select what to send...'. Below the summary is a 'Withdraw quote' link. The main content area has a message: 'You may complete all required fields now or later.' It contains a form for 'Quote ...1a50a7' with fields for 'Quote name (optional)', 'Requested effective date' (06/01/2021), and 'Employees' (2 active, 0 dependents). There's an 'Export census' link and an 'Estimated monthly premium' box showing '\$1,836.04 - \$1,920.92'. Below this is a 'Message information' section with a blue arrow pointing to the 'Email address of recipient' field. It includes a 'Send a copy to you' checkbox, a 'Subject' field with 'Quote from Premera Blue Cross', and a text area for 'Your additional message' containing the text 'Please review this quote at your earliest convenience. Let me know if you have any questions.' There's a 'PDF attachments' section with a 'Required' list: 'Estimated premium rate sheet', 'Census', 'WA Small Group Quote Assumptions', and 'Non-discrimination Disclosure Form'. At the bottom, there are buttons for '< Back to plans', 'Skip to application', 'Generate proposal', and 'Send proposal'. Two blue arrows point to the 'Generate proposal' and 'Send proposal' buttons.

- Enter email address(es) if selecting to 'Send proposal'
- Click 'Generate proposal' button to preview the proposal or click 'Send proposal' button to email the proposal

## Generate proposal ✕

**This quote will be locked.**  
You will no longer be able to edit the quote.

The quote will be locked to maintain the proposal rates. You can generate additional proposals at any time. You will be notified on Ds 032321's overview when your proposal is ready to be downloaded.

[Cancel](#) [Continue to overview](#)

- Click 'Continue to overview'

# Overview

PREMERA BLUE CROSS

Hi, Richard

## Ds 032321 Overview

Seattle (King), WA 98103 | 1 Location | 2 employees

Search for people or companies...

Dashboard / Overview Prospect

**Your proposal has been generated.**  
Quote d84dfb4a-416b-4727-8065-7e037d1a50a7

Download proposal

### Activities

+ New company quote

1 Proposal generated

**Quote ...1a50a7** Show

Created by Richard Hughes on 03/23/2021 12:58 PM  
Generated by Richard Hughes on 03/23/2021 1:45 PM

Requested effective date	Employees	Estimated monthly premium
06/01/2021	2 active, 0 dependents	<b>\$1,836.04 - \$1,920.92</b>

**Plans** View  
2 Medical, 1 Dental, 1 Vision, 0 Ortho,  
0 TMJ

Contact information

Start employer application >

### Company information

Primary location  
Seattle (King), WA 98103  
1 location  
Primary contact  
...

Recent updates  
No updates to display.

### Attachments

Group size attestation form  
0 uploaded

Upload documents

- Click 'Download proposal' button

PREMERA  
WILE CROSS

Hi, Richard

# Ds 032321 Overview

Seattle (King), WA 98103 | 1 Location | 2 employees

Search for people or companies...

Dashboard / Overview Prospect

### Activities + New company quote

1 Proposal generated

#### Quote ...1a50a7 Show

Created by Richard Hughes on 03/23/2021 12:58 PM  
**Generated by Richard Hughes on 03/23/2021 1:45 PM**

<b>Requested effective date</b>	<b>Employees</b>	<b>Estimated monthly premium</b>
06/01/2021	2 active, 0 dependents	<b>\$1,836.04 - \$1,920.92</b>

**Plans View**  
2 Medical, 1 Dental, 1 Vision, 0 Ortho,  
0 TMJ

[Contact information](#) ▾

[Start employer application](#) >

### Company information

Primary location  
Seattle (King), WA 98103  
1 location

Primary contact  
---

### Recent updates

No updates to display.

### Upload documents ▾

#### Attachments

**Group size attestation form**  
0 uploaded

Quote\_proposal\_2....pdf ^ Show all

- The downloaded proposal is displayed and accessible

# Find an Existing Group

---

- Case Search
  - Enter your search criteria within the 'Search for people or companies' input at the top of the Dashboard page
  - Select the desired case from the search results displayed
- Dashboard
  - Click on Dashboard in the global navigation on top right
  - Select desired New Business quick filter option(s)
    - Quoting
    - Proposal
    - Enrolling
    - In review
    - Final rates review
    - Final rates ready
  - If the case is not displayed, you can click the 'Advanced filters' link to narrow your list
  - Once the case is displayed within the Work queue, click the 'Resume' link

# Edit an Existing Quote

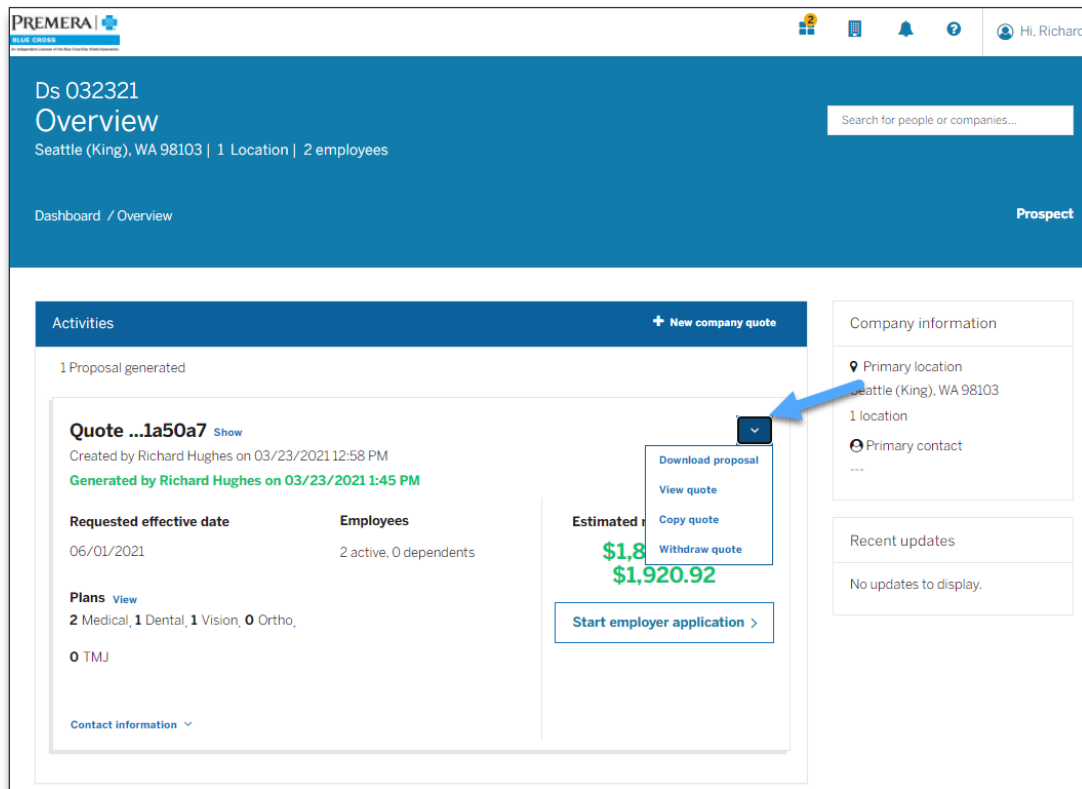
If the quote has not had a proposal generated, you can return to the quote to view, make changes and / or complete the quote.

- If accessing from the Case search, select the case name
- If accessing from the Work queue, click 'Resume'
- The Profile page will display, allowing you to progress through the flow making any desired changes.
- If you access the quote and the page is read only, a proposal was already generated which locks the quote. You can utilize the Copy quote feature if you wish to make changes.

# Copy Quote

Once proposals are generated, the quotes will be locked but you can choose to copy the quote and make changes to the copy.

- Access the Overview page by searching for the case through Case Search
- Click the menu option and select 'Copy quote'



- The Profile page will display allowing you to make any desired changes. The Requested effective date field and desired plans will need to be selected but all other fields will be prefilled with the data from the original quote.

## Initiate Group Enrollment

- Access the Overview page for the desired quote

The screenshot displays the 'Overview' page for quote 'Ds 032321'. The page header includes the Premera MyLife Cross logo and user information 'Hi, Richard'. The main content area shows the quote details, including the requested effective date (06/01/2021), the number of employees (2 active, 0 dependents), and the estimated monthly premium range (\$1,836.04 - \$1,920.92). A blue arrow points to the 'Start employer application' button. The right sidebar contains company information and recent updates.

Requested effective date	Employees	Estimated monthly premium
06/01/2021	2 active, 0 dependents	\$1,836.04 - \$1,920.92

- Click 'Start employer application' button

PREMERA  
BLUE CROSS

Hi, Richard

## Employer application

Search for people or companies

**Enrollment census**  
5 products  
2 employees  
0 dependents

**Plan offerings**  
Add your plans...



[Cancel enrollment](#)

**Information:** You can verify the census and provide any additional details to support the employee elections. You can export the current census, enter the additional required information and import the census to speed up the process.

2 employees | 0 dependents | 5 products  
Last updated by Richard Hughes on 03/23/2021 1:11 PM

[Add employee](#) | [Export census](#) | [Replace census](#)

Filter by name, age, ZIP, status or coverage...  Attention required (0) Sort by:

Employee	ZIP	Status	Dependents	Coverage	
anderson, amy					<a href="#">Remove</a> <a href="#">Edit</a>
F, 54	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE	
bailey, bill					<a href="#">Remove</a> <a href="#">Edit</a>
M, 53	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE	

- 'Edit' each employee to complete required fields for initiating enrollment. Fields required for enrollment that were not required in quoting include:
  - First name
  - Last name
  - Hire date
  - SSN
  - Address1
  - Home phone
  - Dependents First name
  - Dependents Last name
  - Dependents SSN



# Employee ✕

\* Indicates required

**\* First name**      **Middle name**      **\* Last name**

amy           anderson

**\* Gender**      **\* Date of birth**      **\* Employment**

   
 04/17/1967 
    
 Active

**\* Hire date**      **\* SSN**

05/01/2020       317-20-1400

**\* Address 1**      **Address 2**

100 main street     

**\* ZIP code**

98103       Seattle, WA (King)

**\* Home phone**      **Email address**


(555) 555-1212     

Coverage

**Medical**      **Dental**

EE       EE



- Click 'Save and exit' to return to the census
- Repeat editing each employee, completing required fields
- Additional options available

PREMERA | BLUE CROSS

Hi, Richard

# Employer application

Search for people or companies

**Enrollment census**  
5 products  
2 employees  
0 dependents

**Plan offerings**  
Add your plans...

[Cancel enrollment](#)

**Information:** You can verify the census and provide any additional details to support the employee elections. You can export the current census, enter the additional required information and import the census to speed up the process.

2 employees | 0 dependents | 5 products  
Last updated by Richard Hughes on 03/23/2021 1:56 PM

[Add employee](#) | [Export census](#) | [Replace census](#)

Filter by name, age, ZIP, status or coverage...  Attention required (0) Sort by:

Employee	ZIP	Status	Dependents	Coverage
anderson, amy <a href="#">Remove</a> <a href="#">Edit</a>				
F, 54	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE
bailey, bill <a href="#">Remove</a> <a href="#">Edit</a>				
M, 53	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE

[Back to overview](#) [Continue to plan offerings](#)

- Employees can be added by clicking the 'Add employee' link from the census
- Employees can be removed by clicking the 'Remove' link for the desired employee
- If you wish to export the census and make changes externally, from the Enrollment census page
  - click 'Export census'
  - the current census data will be exported in Excel
  - open the template, update applicable information and save the spreadsheet
  - click 'Replace census' and import the updated spreadsheet

PREMERA BLUE CROSS

Hi, Richard

# Employer application

Search for people or companies

**Enrollment census**  
5 products  
2 employees  
0 dependents

**Plan offerings**  
Add your plans...

[Cancel enrollment](#)


**You can verify the census and provide any additional details to support the employee elections. You can export the current census, enter the additional required information and import the census to speed up the process.**

2 employees | 0 dependents | 5 products  
Last updated by Richard Hughes on 03/23/2021 1:56 PM


[Add employee](#) | [Export census](#) | [Replace census](#)

Filter by name, age, ZIP, status or coverage... | Attention required (0) | Sort by: ▾

Employee	ZIP	Status	Dependents	Coverage
anderson, amy <a href="#">Remove</a>   <a href="#">Edit</a>				
F, 54	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE
bailey, bill <a href="#">Remove</a>   <a href="#">Edit</a>				
M, 53	98103	Active	---	Medical:EE Dental:EE Vision:EE Ortho:EE TMJ:EE

[Back to overview](#)  [Continue to plan offerings >](#)

- Once all employees are complete, click 'Continue to plan offerings' from the census page.

**PREMERA**  **BLUE CROSS**

Hi, Richard

# Employer application

Search for people or companies

**Enrollment census**  
5 products  
2 employees  
0 dependents

**Plan offerings**  
Add your plans...

[Cancel enrollment](#)

**Select which plans the employer is planning to offer their employees. The final premiums will be calculated after employee selections and contributions.**

Medical plans (2)

Plan Name	Individual deductible (In-network/Out of network)	Family deductible (In-network/Out of network)	Individual OOP (In-network/Out of network)	Family OOP (In-network/Out of network)	Coinsurance	Premium (monthly)	Action
Balance 250 Platinum	\$250 / \$500	\$500 / \$1,000	\$4,000 / Unlimited	\$8,000 / Unlimited	15% / 50%	\$1816.88	<a href="#">Add</a>
Balance 500 Platinum	\$500 / \$1,000	\$1,000 / \$2,000	\$5,000 / Unlimited	\$10,000 / Unlimited	15% / 50%	\$1732	<a href="#">Add</a>

Dental plans (1)

Plan Name	Individual deductible	Family deductible	Annual maximum	Preventive services	Basic services	Premium (monthly)	Action
Adult Dental Optima 1000	\$50 / Shared with In Network	\$150 / Shared with In Network	\$1,000 PCY / Shared with In Network	Covered in Full / Same as in-network cost share	Deductible, then 20% / Same as in-network cost share	\$78.08	<a href="#">Add</a>

Vision plans (1)

Plan Name	Premium (monthly)	Action
Adult Vision	\$25.96	<a href="#">Add</a>

**Total estimated monthly premiums: \$0.00**

[Back to enrollment census](#) [Continue](#)

[Back to top](#)

**Note:** if there's only one product/plan, it will default to selected

- Click 'Add' for each desired plan to enroll and click 'Continue'

PREMERA BLUE CROSS

Hi, Richard

# Employer application

Search for people or companies

**Enrollment census**  
5 products  
2 employees  
0 dependents

**Plan offerings**  
2 medical selected  
1 vision selected  
1 dental selected

[Cancel enrollment](#)

Select which plans the employer is planning to offer their employees. The final premiums will be calculated after employee selections and contributions.

Medical plans (2)

Plan Name	Individual deductible (In-network/Out of network)	Family deductible (In-network/Out of network)	Individual OOP (In-network/Out of network)	Family OOP (In-network/Out of network)	Coinsurance	Premium (monthly)
Balance 250 Platinum	\$250 / \$500	\$500 / \$1,000	\$4,000 / Unlimited	\$8,000 / Unlimited	15% / 50%	\$1816.88
Balance 500 Platinum	\$500 / \$1,000	\$1,000 / \$2,000	\$5,000 / Unlimited	\$10,000 / Unlimited	15% / 50%	\$1732

Dental plans (1)

Plan Name	Individual deductible	Family deductible	Annual maximum	Preventive services	Basic services	Premium (monthly)
Adult Dental Optima 1000	\$50 / Shared with In Network	\$150 / Shared with In Network	\$1,000 PCY / Shared with In Network	Covered in Full / Same as in-network cost share	Deductible, then 20% / Same as in-network cost share	\$78.08

Vision plans (1)

Plan Name	Premium (monthly)
Adult Vision	\$25.96

**Total estimated monthly premiums: \$1,836.04 - \$1,920.92**

[Back to enrollment census](#) [Continue](#)

- Once all desired products/plans have been selected, click 'Continue'.

# Complete Employer Application

- Initiate the enrollment process by completing steps defined within 'Initiate Group Enrollment'

## Profile

**PREMERA** Hi, Richard

### Employer application

Search for people or companies

- Profile** Amy Anderson (555) 555-1212 dhast@benefitfocus.com
- Eligibility** Required fields must be completed to continue
- Contributions** Required fields must be completed to continue
- Current coverage** Required fields must be completed to continue
- Federal requirements** Required fields must be completed to continue

[Cancel enrollment](#)

\* Indicates required

#### Company information

<b>Company name</b> Ds 032321 <a href="#">Edit</a>	<b>Common name</b> [Input field]	<b>Note:</b> If Company Name exceeds 43 characters insert a common name of no more than 50 characters including spaces.	<b>* Washington State Unified Business Identifier (UBI)</b> 123456789
<b>* NAICS #</b> 312113 - Ice Manufacturing <input checked="" type="checkbox"/>	<b>* Federal tax ID / EIN</b> 44-4444444	<b>* Ownership type</b> Proprietorship	

#### Primary address

<b>* Address 1</b> 509 Main Street	<b>Address 2</b> [Input field]	<b>ZIP code</b> 98103	Seattle, WA (King)
---------------------------------------	-----------------------------------	--------------------------	--------------------

#### Mailing address

<b>* Address 1</b> 509 Main Street	<b>Address 2</b> [Input field]	<b>* ZIP code</b> 98103 <input checked="" type="checkbox"/>	Seattle, WA (King)
---------------------------------------	-----------------------------------	--	--------------------

Billing address is the same as primary address

#### Group contact

Mr.  Mrs.  Ms.

<b>* First name</b> Amy	<b>* Last name</b> Anderson	<b>* Email address</b> dhast@benefitfocus.com
<b>Title</b> [Input field]		

\* At least one phone number is required

<b>Office</b> (555) 555-1212	<b>Mobile</b> ( ) - - - -	<input type="checkbox"/> Use mobile as primary number
---------------------------------	------------------------------	---

Billing contact is the same as group contact

#### \* Do you use a COBRA Administrator?

No  Yes

[Back to plan offerings page](#) [Continue to eligibility >](#)

- You can enter a unique billing address if desired by unselecting the 'Billing address is the same as primary address'
- You can enter a unique billing contact by unselecting the 'Billing contact is the same as group contact'

- Complete all required and desired fields on the Profile page and click 'Continue to eligibility' when complete

Eligibility

PREMERA BLUE CROSS

Hi, Richard

# Employer application

Search for people or companies

- Profile**  
Amy Anderson  
(555) 555-1212  
dhast@benefitfocus.com
- Eligibility**  
Required fields must be completed to continue
- Contributions**  
Required fields must be completed to continue
- Current coverage**  
Required fields must be completed to continue
- Federal requirements**  
Required fields must be completed to continue

[Cancel enrollment](#)

\* Indicates required

Employee count

\* Total employed 2      \* Minimum hours 40

Employee enrollment

	Medical	Dental
* Total enrolled:	2	2
* Total number of eligible employees enrolling:	2	2
* Total number of employees not eligible to enroll: <i>Employees working less than the minimum number of hours required per week, are in a probationary period, are temporary or seasonal, not in covered class.</i>	0	0
* Total number of employees not enrolling due to coverage under other group coverage or a Government plan (Medicare, CHAMPUS/Tricare or Military):	0	0
* Eligible employees waiving enrollment without other group coverage: <b>Note:</b> Individual Coverage is not a valid waiver.	0	0

Do you have eligible employees in Hawaii?

Yes  
 No

**Please note:** Employees who reside in the state of Hawaii are not eligible for coverage.

Date profile

\* Please select the appropriate date profile to specify when the benefits should be effective

Exact Date

\* Please select the appropriate wait period for your group

0 DAYS

\* Waive wait period

Yes No

[Back to profile](#) [Continue to contributions](#)

- Enter required eligibility fields and click 'Continue to contributions'

## Contributions



PREMERA BLUE CROSS

Hi, Richard

# Employer application

Search for people or companies

- Profile**  
Amy Anderson  
(555) 555-1212  
dhast@benefitfocus.com
- Eligibility**  
2/2/2 eligible  
40 weekly hours
- Contributions**  
Required fields must be completed to continue
- Current coverage**  
Required fields must be completed to continue
- Federal requirements**  
Required fields must be completed to continue

[Cancel enrollment](#)

**Please select the amount the employer will be contributing towards the cost of coverage.**  
\* Indicates required

**Medical**

* Employees	* Dependents
50%	0%

**Dental**

* Employees	* Dependents
50%	0%

[Back to eligibility](#) [Continue to current coverage](#)

- Enter required contribution fields and click 'Continue to current coverage'

# Current Coverage

The screenshot shows the 'Employer application' interface for Premera. The top navigation bar includes the Premera logo, a search bar, and user information 'Hi, Richard'. Below the navigation bar, there are five tabs: Profile, Eligibility, Contributions, Current coverage (selected), and Federal requirements. The 'Current coverage' tab is highlighted in dark blue and contains the text 'Required fields must be completed to continue'. The 'Federal requirements' tab also contains the text 'Required fields must be completed to continue'. The main content area is titled 'Premera questions' and contains two questions with radio button options: '\* Is this plan intended to replace any existing group coverage?' (Yes/No) and '\* Has this group had medical coverage within the past 90 days?' (Yes/No). Below these questions is a 'Coverage information' section with three fields: '\* Current carrier' (ABC Health & Welfare), 'Group number' (123456789), and '\* Proposed termination date' (05/31/2021). At the bottom of the form, there are two buttons: '< Back to contributions' and 'Continue to Federal requirements >'. A blue arrow points to the 'Continue to Federal requirements >' button.

- Enter required fields for current coverage and click 'Continue to Federal requirements'

# Federal Requirements

The screenshot shows the 'Employer application' page for Amy Anderson. The 'Federal requirements' section is active, showing several required questions. The first question asks if the group is subject to federal Medicare Secondary Payer (MSP) laws regarding age, with 'No. Under 20 Employees' selected. The second question asks if the group is subject to MSP laws regarding disability, with 'No. Under 100 Employees' selected. A third question asks for the number of employees meeting Medicare's definition of 'employee', with '0' entered. The fourth question asks if the group is subject to ERISA, with 'Yes' selected, and the ERISA plan year ends in 'April'. The fifth question asks if the group is subject to COBRA, with 'No' selected. A text field for the legal reason for exemption contains 'only 2 employees'. At the bottom, there is a 'Back to current coverage' button and a 'Submit and continue' button with a blue arrow pointing to it.

**PREMERA** BLUE CROSS

Hi, Richard

## Employer application

Search for people or companies

- Profile**  
Amy Anderson  
(555) 555-1212  
dhast@benefitfocus.com
- Eligibility**  
2/2/2 eligible  
40 weekly hours
- Contributions**  
50%/0% medical  
50%/0% dental
- Current coverage**  
Medical coverage
- Federal requirements**  
Required fields must be completed to continue

[Cancel enrollment](#)

### Federal requirements

\* Indicates required

We strongly urge you to consult legal counsel in answering the questions below. The summaries below are not intended to be or to replace legal advice on your particular group. It is the groups responsibility to inform Premera if facts change which would cause the groups answers below to change.

**\* Is the group subject to the federal Medicare Secondary Payer (MSP) laws that prohibit discrimination against individuals with group coverage based on their (or a spouse's) current employment status who have Medicare due to age?**

Yes. This plan will be pay primary to Medicare as required by federal law.  
 No. Under 20 Employees.

Helpful Hint: These laws do not apply to any employer who did not employ 20 employees or more for each working day in each of 20 or more calendar weeks in either the current or preceding calendar year. For these small group plans, Medicare pays primary to the group plan. "Employees" include all full-time and part-time employees as well as those employees on disability and subject to FICA taxes. Also count leased employees if they would be counted as employees under §414(n)(2) of the Internal Revenue Code (IRC), and count employees employed by an "affiliated service group" under IRC §414(m) or by employers considered to be a "single employer" under IRC §52(a) or (b).

**\* Is the group subject to the federal Medicare Secondary Payer (MSP) laws that prohibit discrimination against individuals with group coverage based on their (or a family member's) current employment status who have Medicare due to disability?**

Yes. This plan will be pay primary to Medicare as required by federal law.  
 No. Under 100 Employees.

**\* Please also provide the number of employees who now meet Medicare's definition of "employee".**

0

**\* Is the group subject to ERISA?**  Yes  No

**\* Enter the month the ERISA plan year ends:** Month April

**\* Is the group subject to COBRA?**  Yes  No

**\* Give the legal reason for exemption**

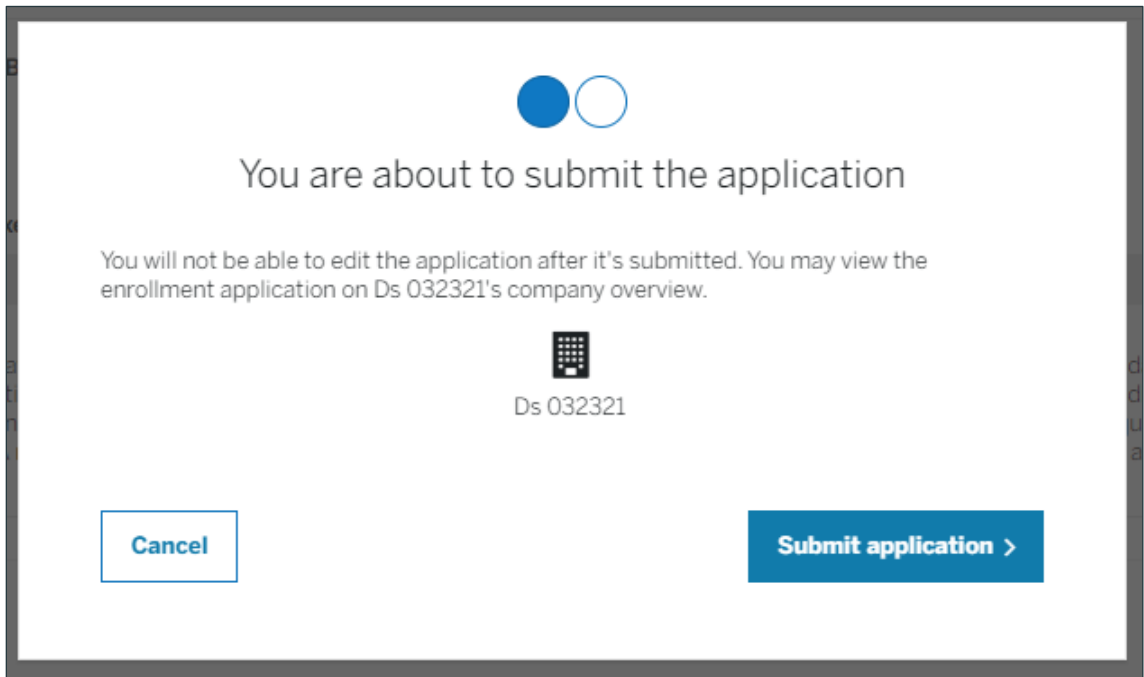
only 2 employees

Helpful Hint: Generally, these laws apply to any non-church employer that employed 20 or more employees on at least 50% of its working days in the preceding calendar year. "Employees" include full-time and part-time common law employees. Self-employed workers as defined by IRC§401(c)(1), corporate directors, or independent contractors should not be counted unless they qualify as common-law employees. "Employees" may also include leased employees who qualify as common-law employees. Please see COBRA requirements at 26 CFR§54.4980B-2 Q/A 5 for guidance on counting a part-time employee as a fraction of a full-time employee.

[Back to current coverage](#) [Submit and continue](#)

- Complete required fields and click 'Submit and continue' button

## Submit Application



- Click 'Submit application'

# Manage Enrollment

- Initiate the enrollment process by completing steps defined within 'Initiate Group Enrollment'
- Once the employer application has been submitted, you'll be returned to the Overview page.

The screenshot shows the PREMIERA Blue Cross Overview page for Ds 032321. The page header includes the company name, location (Seattle (King), WA 98103), and employee count (2 employees). A notification bar at the top states: "Enrollment is not ready to start employee elections. You will receive an email notification that the enrollment status has changed to enrolling when you can begin employee elections." A blue arrow points to this notification. Below the notification, the "Activities" section shows "1 Employer app completed". The main quote section displays "Quote ...c6e16f" with a "Show" button. It includes the requested effective date (06/01/2021), employee count (2 active, 0 dependents), and estimated monthly premium (\$1,836.04 - \$1,920.92). A "View application" button is visible. The right sidebar shows "Company information" including the primary location (509 Main Street, Seattle (King), WA 98103) and primary contact (Amy Anderson, dhast@benefitfocus.com, Office: (555) 555-1212).

- After a short time, the page will refresh, indicating the employer application has been submitted and you can start enrolling the employees.

**PREMERA**  
 Ds 032321  
**Overview**  
 Seattle (King), WA 98103 | 1 Location | 2 employees

Search for people or companies...

Dashboard / Overview Prospect

**Employer application has been submitted.**  
 You can start enrolling the employees.

**Quick links**  
 Start new quote

**Company information**  
 Primary location  
 509 Main Street  
 Seattle (King), WA 98103  
 1 location  
 Primary contact  
 Amy Anderson  
 dhast@benefitfocus.com  
 Office: (555) 555-1212

**Recent updates**  
 No updates to display.

**Activities** + New company quote

1 Enrolling

**Quote ...c6e16f** show  
 Started by Richard Hughes on 03/23/2021 1:51 PM

**Enrollment status**  
 0 COMPLETE | 0 IN PROGRESS | 0 NOT STARTED  
 2 employees | 0 dependents  
 Manage enrollment

**Enrollment closes**  
 70 days on June 01, 2021  
 Coverage effective date: 06/01/2021

**Product participation**

100% required | 0% actual employee participation  
 2 Medical 0% complete --- /mo

0% required | 0% actual employee participation  
 1 Vision 0% complete --- /mo

100% required | 0% actual employee participation  
 1 Dental 0% complete --- /mo

Total monthly premium: ---

Contact information

Upload documents

**Attachments**

Group size attestation form  
 0 uploaded

Late letter  
 0 uploaded

PFAs Enrollment forms  
 0 uploaded

HSA setup forms  
 0 uploaded

Disability Dep forms  
 0 uploaded

- You can choose to View details of any selected plan, Upload documents or Manage enrollment.
- Click 'Manage enrollment' link to access the manage enrollment page the group

# Enrollment Center / Home

PREMERA  
blue cross

Enrollment Center Richard Hughes

Welcome, Ds 032321! [View all employees](#) [Add a new employee](#)

Search by Name or SSN

### To-do list

In order to End Data Collection, please complete the following  
[Complete Employee Elections](#)  
Please complete all the pending approval tasks for the HR administrator to end data collection.

#### Completed Items

- Complete Benefit Setup  
Completed On: 03/23/2021 by RICHARDH3
- Begin Data Collection for Premera Blue Cross  
Completed On: 03/23/2021 by RICHARDH3
- Complete Date Rule Setup  
Completed On: 03/23/2021 by BFQUOTING

### To-do list

View by:

#### Personal

2 [Employees Need to be Approved](#)

#### Benefits not started

Enrollment period: 06/01/2021 - 05/31/2022 Benefit offer: 2 selected

2 [Employees with 6 or more days left to enroll](#)   
[View all employees with benefits not started >](#)

### Benefit Participation

06/01/2021 - 05/31/2022  
Medical

0 0

Balance 500 Platinum Balance 250 Platinum

### Open Enrollment progress

Time remaining [?](#)  
434 : 08 :  
days hours  
06  
minutes

0% Complete

0 Complete  
0 In progress  
2 Not started

#### Administrative Tools

#### Additional tools

[Job Status >](#)

- The Enrollment Center or Home page is the access point for employee enrollment data
- You can view 'Completed Items', 'To-do list', 'Benefit Participation', 'Export' participation information, 'View all employees', 'Add a new employee', and the percentage of completion is shown within the 'Open Enrollment progress' section.

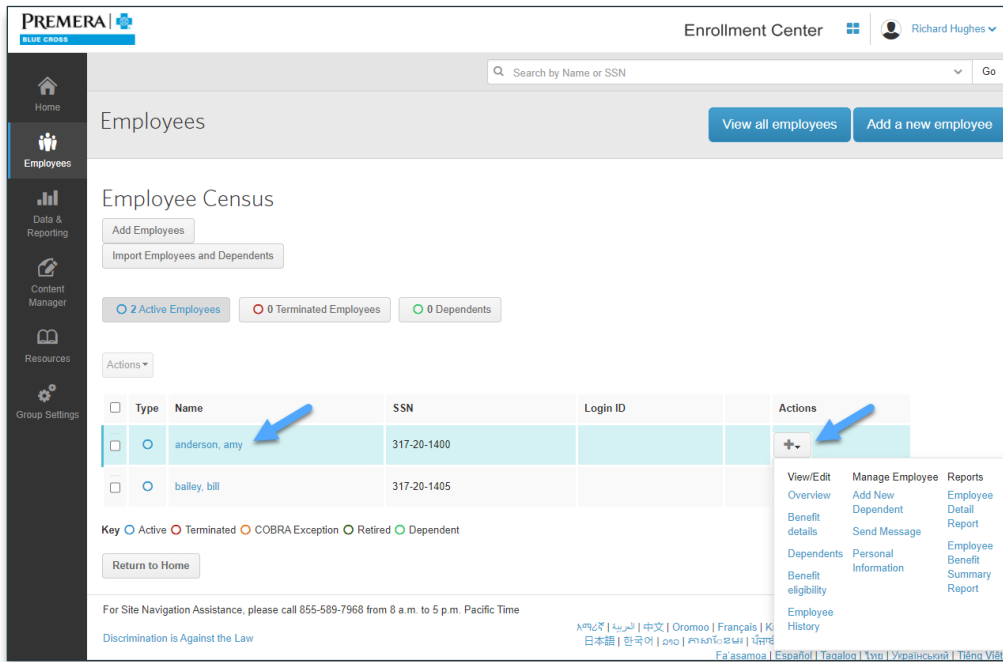
# Employee Enrollment

The screenshot displays the Premera Enrollment Center interface. At the top, the Premera logo and 'Enrollment Center' are visible, along with the user name 'Richard Hughes'. The main header area says 'Welcome, Ds 032321!' and includes buttons for 'View all employees' and 'Add a new employee'. A search bar is located below the header. The left sidebar contains navigation options: Home, Employees (highlighted with a blue arrow), Data & Reporting, Content Manager, Resources, Group Settings, and a repeating set of Resources and Group Settings. The main content area is divided into several sections: a 'To-do list' with a task 'Complete Employee Elections' (highlighted with a blue arrow), a 'Completed Items' section listing three tasks, another 'To-do list' with a 'View by' dropdown set to 'All Tasks', a 'Personal' section with '2 Employees Need to be Approved' and an 'Approve All' button, a 'Benefits not started' section with an enrollment period of '06/01/2021 - 05/31/2022' and '2 selected' benefit offers, and a 'Benefit Participation' section with a chart showing participation for 'Medical' benefits. The right sidebar shows 'Open Enrollment progress' with a timer at 434:08:06 and a 0% completion gauge. Below the gauge are counts for 'Complete' (0), 'In progress' (0), and 'Not started' (2). Further down are sections for 'Administrative Tools' and 'Additional tools'.

- Click the 'Complete Employee Elections' link or 'Employees' icon in the left nav

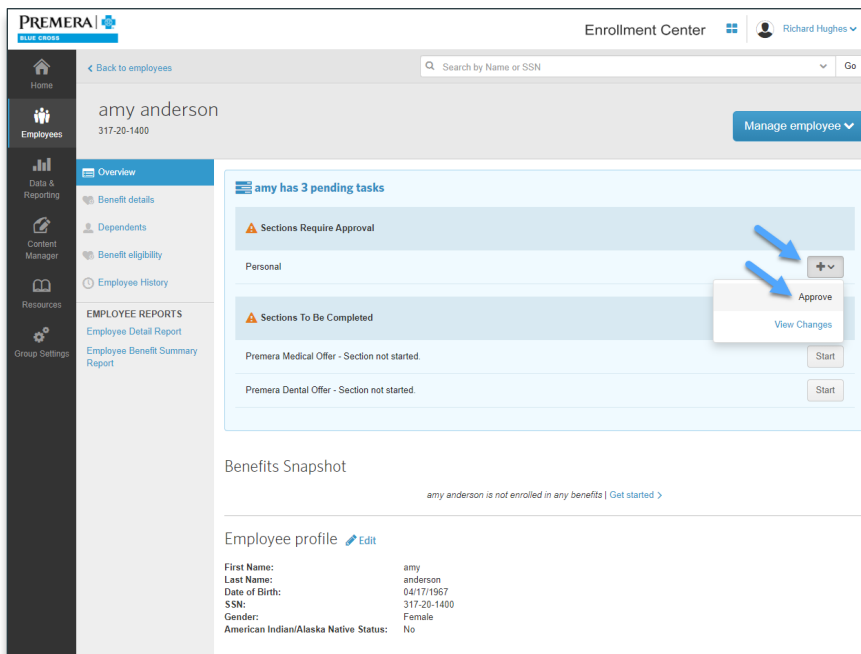


# Employee Census



# Employee Overview

- Select the desired Action or click the employee name you wish to edit.



- If there's any Personal/Business information requiring approval, review information and 'Approve'

**PREMERA** | BLUE CROSS

Enrollment Center | Richard Hughes

Home | Back to employees | Search by Name or SSN | Go

amy anderson  
317-20-1400 | Manage employee

**amy has 2 pending tasks**

**Sections To Be Completed**

- Premera Medical Offer - Section not started. [Start](#)
- Premera Dental Offer - Section not started. [Start](#)

Benefits Snapshot

amy anderson is not enrolled in any benefits | [Get started >](#)

Employee profile [Edit](#)

**First Name:** amy  
**Last Name:** anderson  
**Date of Birth:** 04/17/1967  
**SSN:** 317-20-1400  
**Gender:** Female  
**American Indian/Alaska Native Status:** No

**Contact**

**Home phone:** 555-555-1212  
**Standard Address:** 100 main street, Seattle, WA 98103

**Work**

**Hire Date:** 05/01/2020  
**Salary:** Not Available  
**Retired:** No

- Click 'Start' to review / select desired benefits

# Benefit Details

**PREMERA** BLUE CROSS Enrollment Center Richard Hughes

amy anderson 317-20-1400 Manage employee

### Open Enrollment Benefits

#### Prerema Medical Offer

Plan

\*Select A Plan Offered By Premera Blue Cross

Balance 250 Platinum

Balance 250 Platinum Details

Individual Deductible	Family Deductible	Individual Out of Pocket Maximum	Family Out of Pocket Maximum (OOP Max)	Annual Maximum
250.0	500.0	4000.0	8000.0	Unlimited

[View all plan details](#)

Balance 250 Platinum

Balance 500 Platinum

Balance 500 Platinum Details

Individual Deductible	Family Deductible	Individual Out of Pocket Maximum	Family Out of Pocket Maximum (OOP Max)	Annual Maximum
500.0	1000.0	5000.0	10000.0	Unlimited

[View all plan details](#)

Balance 500 Platinum  
Decline Coverage

Decline coverage for this person

**Next**

- Make desired benefit selections and click 'Next'

PREMERA BLUE CROSS Enrollment Center Richard Hughes

Open Enrollment Benefits  
Premera Medical Offer

Medical Benefits Accepted Edit

Plan Balance 250 Platinum Edit

Balance 250 Platinum

Coverage Level

Balance 250 Platinum Details

Individual Deductible	Family Deductible	Individual Out of Pocket Maximum	Family Out of Pocket Maximum (OOP Max)	Annual Maximum
250.0	500.0	4000.0	8000.0	Unlimited

[View all plan details](#)

Select a Coverage Level for Balance 250 Platinum

- Employee Only
- Employee and Spouse
- Employee and Children
- Employee and Family

Decline Coverage

- Decline coverage for this employee

Next

- Select desired Coverage Level and select 'Next'

PREMERA BLUE CROSS Enrollment Center Richard Hughes Manage employee

317-20-1400

Open Enrollment Benefits  
Premera Medical Offer

Medical Benefits Accepted Edit

Plan Balance 250 Platinum Edit

Balance 250 Platinum

Coverage Level Employee Only Edit

Persons Covered

Name	Relationship
amy anderson	Subscriber

Effective Date

Enter an effective date.\*  📅

Next

- Confirm information and click 'Next'

PREMERA | BLUE CROSS

Enrollment Center Richard Hughes

Search by Name or SSN Go

Home

Employees

amy anderson  
317-20-1400 Manage employee

Overview

**Benefit details**

Dependents

Benefit eligibility

Employee History

EMPLOYEE REPORTS

Employee Detail Report

Employee Benefit Summary Report

### Open Enrollment Benefits

#### Premera Medical Offer

#### Medical Benefits

You may edit this benefit by clicking on the section's corresponding Edit button.

<b>Medical Benefits</b>	Accepted	<span>Edit</span>	<b>Monthly Premium Cost Summary</b>	
<b>Plan</b>	Balance 250 Platinum Balance 250 Platinum	<span>Edit</span>	Total Premium	*\$908.44
<b>Coverage Level</b>	Employee Only	<span>Edit</span>	Employee Cost	*\$454.22

**Persons Covered**

Name	Relationship
amy anderson	Subscriber

To edit a person's Name or SSN, click the person's name.

**Effective Date** 06/01/2021 Edit

#### Vision Benefits

You may edit this benefit by clicking on the section's corresponding Edit button.

<b>Vision Benefits</b>	Accepted	<span>Edit</span>	<b>Monthly Premium Cost Summary</b>	
<b>Plan</b>	Adult Vision Adult Vision		Total Premium	*\$12.98
<b>Coverage Level</b>	Employee Only		Employee Cost	*\$6.49

**Persons Covered**

Name	Relationship
amy anderson	Subscriber

To edit a person's Name or SSN, click the person's name.

**Effective Date** 06/01/2021

Cancel without Saving Save Save and Go to Benefits

- Review information on the Benefit Details page and click 'Save and Go to Benefits'

The screenshot displays the Premera Enrollment Center interface for employee amy anderson (ID: 317-20-1400). The page is titled "Open Enrollment Benefits" and shows two offer sections:

- Premera Medical Offer:**
  - Open Enrollment: 03/23/2021 - 05/31/2022
  - Benefit Period Start: 06/01/2021
  - Status: Accepted
  - Plan Name: Balance 250 Platinum
  - Coverage Level: Employee Only
  - Covered Persons: amy anderson (Subscriber, effective 06/01/2021)
- Premera Dental Offer:**
  - Open Enrollment: 03/23/2021 - 05/31/2022
  - Benefit Period Start: 06/01/2021

Buttons for "Refuse All Benefits", "Refuse Benefits", and "Start" are visible. A blue arrow points to the "Start" button for the dental offer.

- Continue thru each product line; selecting desired plans / coverage level or to decline coverage
- Once all product lines are complete, the Benefit Details page will display showing all selected plans, premium breakdown, coverage level and persons covered
- Select Edit for any information that needs to be modified

The screenshot displays the Premera Enrollment Center interface. At the top, the Premera logo and 'BLUE CROSS' are visible on the left, and 'Enrollment Center' and the user name 'Richard Hughes' are on the right. A search bar is located below the header. The main content area shows the employee name 'amy anderson' with ID '317-20-1400' and a 'Manage employee' button. A blue arrow points to the 'Employees' icon in the left navigation menu. The main content area is divided into sections for 'Premera Medical Offer' and 'Premera Dental Offer'. Each offer section includes details such as 'Open Enrollment' dates, 'Benefit Period Start', and 'Medical Benefits' or 'Dental Benefits' information.

- If all benefits for the employee have been completed and is accurate, click the 'Employees' icon in the left nav
- Repeat for each employee you're making elections for

PREMIERA BLUE CROSS Enrollment Center Richard Hughes

Search by Name or SSN Go

Home Employees

View all employees Add a new employee

### Employee Census

Add Employees Import Employees and Dependents

2 Active Employees 0 Terminated Employees 0 Dependents

Actions

<input type="checkbox"/>	Type	Name	SSN	Login ID	Actions
<input type="checkbox"/>	Active	anderson, amy	317-20-1400		+ -
<input type="checkbox"/>	Active	bailey, bill	317-20-1405		+ -

Key Active Terminated COBRA Exception Retired Dependent

Return to Home

- Click 'Return to Home' or the 'Home' icon in the left nav



# End Data Collection

**PREMERA BLUE CROSS** Enrollment Center Richard Hughes

Welcome, Ds 032321! [View all employees](#) [Add a new employee](#)

Search by Name or SSN

### To-do list

You may [End Data Collection](#)

### Completed Items

- Complete Benefit Setup  
Completed On: 03/23/2021 by RICHARDH3
- Begin Data Collection for Premera Blue Cross  
Completed On: 03/23/2021 by RICHARDH3
- Complete Date Rule Setup  
Completed On: 03/23/2021 by BFQUOTING
- Complete Employee Elections  
Completed On: 03/23/2021 by RICHARDH3

### To-do list

View by:

There are no tasks.

### Benefit Participation

06/01/2021 - 05/31/2022  
Medical

Benefit Plan	Participation
Balance 500 Platinum	1
Balance 250 Platinum	1

### Open Enrollment progress

Time remaining

434 : 07 : 36  
days hours minutes

100% Complete

2 Complete  
0 In progress  
0 Not started

### Administrative Tools

### Additional tools

[Job Status >](#)

- Click 'End Data Collection'

The screenshot shows the Premiera Blue Cross Enrollment Center interface. At the top left is the Premiera Blue Cross logo. At the top right, it says 'Enrollment Center' and 'Richard Hughes' with a dropdown arrow. Below the logo is a search bar with the text 'Search by Name or SSN' and a 'Go' button. The main content area is titled 'End Data Collection' and contains the text 'You are about to end data collection for Ds 032321.' Below this text are two buttons: a grey 'Cancel' button and a green 'End Data Collection' button. A blue arrow points to the 'End Data Collection' button. At the bottom of the page, there is a footer with contact information, a 'Language Support' section listing various languages, and a copyright notice for 2021 Premiera Blue Cross.

- Click 'End Data Collection'

# Upload Documents

**PREMERA** ONE SOURCE

Ds 032321  
**Overview**  
Seattle (King), WA 98103 | 1 Location | 2 employees

Search for people or companies...

Dashboard / Overview Prospect

**Employee elections have been completed. Upload any remaining required documents and then submit the enrollment for updated rates.**

**Activities** + New company quote

1 Agent review

**Quote ...c6e16f** Show

Started by Richard Hughes on 03/23/2021 1:51 PM

Enrollment status			Enrollment closes
<b>2</b> COMPLETE	<b>0</b> IN PROGRESS	<b>0</b> NOT STARTED	<b>70</b> days on June 01, 2021
2 employees   0 dependents			Coverage effective date: 06/01/2021
<a href="#">Submit enrollment</a>			

**Product participation**

Product	Required	Actual	Status	View details
Medical	100%	100%	100% complete	<a href="#">View details</a>
Vision	0%	100%	100% complete	<a href="#">View details</a>
Dental	100%	100%	100% complete	<a href="#">View details</a>


Total monthly premium: ---

Contact information


**Upload documents**

**Attachments**

**Group size attestation form**  
0 uploaded

Upload documents 

**Attachments**

 Your file must be under 5MB and in a .xlsx, .docx, .pdf, .jpeg, .png, .gif, .bmp or .txt format.

**Group size attestation form**

0 uploaded [View template](#)

Drag file to upload here  
(or select from your files)

[Select file](#)

**Late letter**

0 uploaded [View template](#)

Drag file to upload here  
(or select from your files)

[Select file](#)

**PFAs Enrollment forms**

0 uploaded

- Upload any remaining documents by clicking on the 'Upload documents' link and the 'Select file' for the document you wish to upload.

# Submit Enrollment

**PREMERA**  
ONE SOURCE

Ds 032321  
**Overview**  
Seattle (King), WA 98103 | 1 Location | 2 employees

Search for people or companies...

Dashboard / Overview Prospect

**Employee elections have been completed. Upload any remaining required documents and then submit the enrollment for updated rates.**

**Activities** + New company quote

1 Agent review

**Quote ...c6e16f** [Show](#)

Started by Richard Hughes on 03/23/2021 1:51 PM

Enrollment status			Enrollment closes
<b>2</b> COMPLETE	<b>0</b> IN PROGRESS	<b>0</b> NOT STARTED	<b>70</b> days on June 01, 2021
2 employees   0 dependents			Coverage effective date: 06/01/2021
<a href="#">Submit enrollment</a>			

**Product participation** View details

100% required | 100% actual employee participation

Product	Participation	Status	Frequency
2 Medical	100% complete	100% complete	--- /mo
1 Vision	100% complete	100% complete	--- /mo
1 Dental	100% complete	100% complete	--- /mo

Total monthly premium: ---

**Company information**

Primary location  
509 Main Street  
Seattle (King), WA 98103  
1 location

Primary contact  
Amy Anderson  
dhast@benefitfocus.com  
Office: (555) 555-1212

**Recent updates**

No updates to display.

**Attachments**

Group size attestation form  
0 uploaded

- Once all documents are uploaded, click 'Submit enrollment'

# Group Agreement to Contract

The screenshot displays the Premera Health Connect interface for a group agreement. At the top, the user is logged in as 'Hi, Richard'. The main header shows 'Ds 032321 Overview' for 'Seattle (King), WA 98103 | 1 Location | 2 employees'. A search bar is available for finding people or companies. Below the header, a navigation bar includes 'Dashboard / Overview' and a 'Prospect' button.


A yellow notification banner states: 'Employee elections have been completed. Upload any remaining required documents and then submit the enrollment for updated rates.' Below this, the 'Activities' section shows '1 Agent review' and a '+ New company quote' button. The main content area features a 'Quote ...c6e16f' card, started by Richard Hughes on 03/23/2021 at 1:51 PM. This card is divided into two panels:

- Enrollment status:** Shows 2 COMPLETE, 0 IN PROGRESS, and 0 NOT STARTED. Below this, it indicates '2 employees | 0 dependents' and a blue link labeled 'Accept and continue' with a blue arrow pointing to it.
- Enrollment closes:** Shows 70 days on June 01, 2021, with a coverage effective date of 06/01/2021.

Below the quote card is the 'Product participation' section, which shows '100% required | 100% actual employee participation' and a 'View details' link. A progress bar for '2 Medical' is shown as 100% complete, with a monthly cost of \$1,774.44.

On the right side, the 'Company information' section lists the primary location as 509 Main Street, Seattle (King), WA 98103, and identifies the primary contact as Amy Anderson (dhast@benefitfocus.com, Office: (555) 555-1212). The 'Recent updates' section shows 'No updates to display.'

- Click the 'Accept and continue' link to access the Group Agreement to Contract

**PREMERA**  **BLUE CROSS**

Hi, Richard

## Employer application

Search for people or companies

**Group agreement**  
Required fields must be completed to continue

**Producer agreement**  
Required fields must be completed to continue

### Group Agreement to Contract

This agreement becomes part of the contract to provide health care coverage after 1) the application is signed by you; 2) the application is received and approved by us; and 3) we receive the initial month's premium charges.

You may not assign this contract without our written consent. Any attempt to do so will not have any binding effect on us. You agree to promptly deliver materials and notifications, including benefit booklets, received from us, to all covered employees. You also agree to provide notification regarding the plan's waiting period and special enrollment rights to all eligible employees before their enrollment. You attest to have read this application, and certify that all statements are true and complete. You agree to the terms and obligations stated in this application.

It is understood that provisions of the Health Care Contract, including subscription charges may be amended or changed from time to time, upon our notice to you. All prior applications, to the extent that you have not made changes to them in this application, remain in full force and effect. The complete application consists of this document and the completed Group Master Application Benefit Selections form. The producer listed in the Producer Agreement to Contract section will remain effective until written notice is given by either party. We are authorized to pay, on your behalf, commission, if any, for which you are liable to the above named producer.

You may elect to allow the producer listed in the Producer Agreement to Contract section to act as a group administrator beginning on the group's effective date. This means that the producer/administrator will be able to access membership and billing functions, and obtain information about group members via the Web on behalf of the group. These functions may include, but are not limited to: Reinstate Terminated Members, Request Invoice, Search for a Member, View Benefit Detail, Inquire on Invoice, Inquire on Eligibility, Enroll a Member, Order ID Cards for an Individual or Whole Family, View Group Demographic Information, Cancel a Member.

As required by RCW 48.43.005(33), to qualify for group coverage as a group of one, a self-employed individual or sole proprietor must: (1) have been employed by the same employer or small group for at least twelve months prior to this application; and, (2) have derived at least seventy-five percent of income from a trade or business for which the appropriate Internal Revenue Service forms have been filed for the previous tax year. A self-employed individual or sole proprietor in an agricultural trade or business must have derived at least fifty-one percent of income from the trade or business for which the appropriate Internal Revenue Service forms have been filed for the previous tax year.

New groups, with a plan effective date in the middle of their plan year, can request the cost-sharing (e.g. deductible, coinsurance and copay) amounts accrued prior to the plan effective date be credited to their new plan.

I affirm the contribution and participation requirements in EMPLOYER CONTRIBUTION AND EMPLOYEE PARTICIPATION REQUIREMENTS are followed. (Applicable to groups renewing outside open enrollment).

**\* Do you elect and authorize Premera Blue Cross to provide such information to the producer?**

Yes  
 No

**\* I affirm that this group has a physical location in the state of Washington, and I am authorized to sign on behalf of the group?**

Yes  
 No

By entering my name, I attest to the following: I am signing the Group Master Application electronically and my electronic signature is the legal equivalent of my manual signature; I am authorized to sign on behalf of the group. The group agrees to the delivery of this agreement by Carrier making the terms available under the Carrier Information section of this site.

**\* Group Representative**

Richard Hughes

**\* Date**

03/23/2021

**\* Title**

Broker

Please Note: It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits.

[Back to overview](#) **Continue to signature** >

- Click the 'Continue to signature' button

PREMERA |

Hi, Richard

# Employer application

Search for people or companies

**Group agreement**  
Signed by Richard Hughes on 03/23/2021

**Producer agreement**  
Required fields must be completed to continue

\* Indicates required

**Producer agreement**

I, the producer, attest to the following: I am signing this producer agreement to contract of the Group Master Application electronically and my electronic signature is the legal equivalent of my manual signature.

You, the producer(s), certify that you have met with the group submitting this agreement and that you have fully explained its contents. You have discussed coverage, eligibility, the effect of misrepresentations, termination provisions and subscription charge billing administration.

**Signature**

**Received wet signature**  
A wet signature from the employer has been received. I acknowledge the receipt of the signature and provide my signature as a testimony to this fact.

**Click to sign on behalf of the employer.**

[Back to group agreement](#) **Sign application**

- Click the check box acknowledging a wet signature has been received, click the 'sign on behalf of' field to electronically sign and click the 'Sign application' button



PREMERA | HELP | ABOUT

Hi, Rich

Ds 032321  
**Overview**  
 Seattle (King), WA 98103 | 1 Location | 2 employees

Search for people or companies...

Dashboard / Overview Prospect

---

**Activities** + New company quote

1 Submitted for review

**Ds 032321's enrollment has been submitted for review.**  
 You will receive an email once the underwriter has accepted or declined the enrollment.

**Quote ...c6e16f** [Show](#)  
 Started by Richard Hughes on 03/23/2021 1:51 PM

[Enrollment summary](#)

**100%** **3**  
 Employee participation PRODUCTS  
 2 employees | 0 dependents  
[View employee details](#)

[Open enrollment closed](#)

on March 23, 2021  
 Coverage effective date: 06/01/2021

**Product participation** [View details](#)

**100% required | 100% actual employee participation**

2 Medical	<div style="width: 100%; height: 10px; background-color: green;"></div>	100% complete	<b>\$1,774.44</b> /mo
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[View details](#)

**0% required | 100% actual employee participation**

1 Vision	<div style="width: 100%; height: 10px; background-color: green;"></div>	100% complete	<b>\$25.96</b> /mo
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[View details](#)

**100% required | 100% actual employee participation**

1 Dental	<div style="width: 100%; height: 10px; background-color: green;"></div>	100% complete	<b>\$78.08</b> /mo
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**Company information**

**Primary location**  
 509 Main Street  
 Seattle (King), WA 98103  
 1 location

**Primary contact**  
 Amy Anderson  
 dhast@benefitfocus.com  
 Office: (555) 555-1212

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**Recent updates**

No updates to display.

- The enrollment has been submitted for review. You will receive an email once the underwriter has accepted or declined the enrollment.
- Status of the activity is updated to 'Submitted for review'