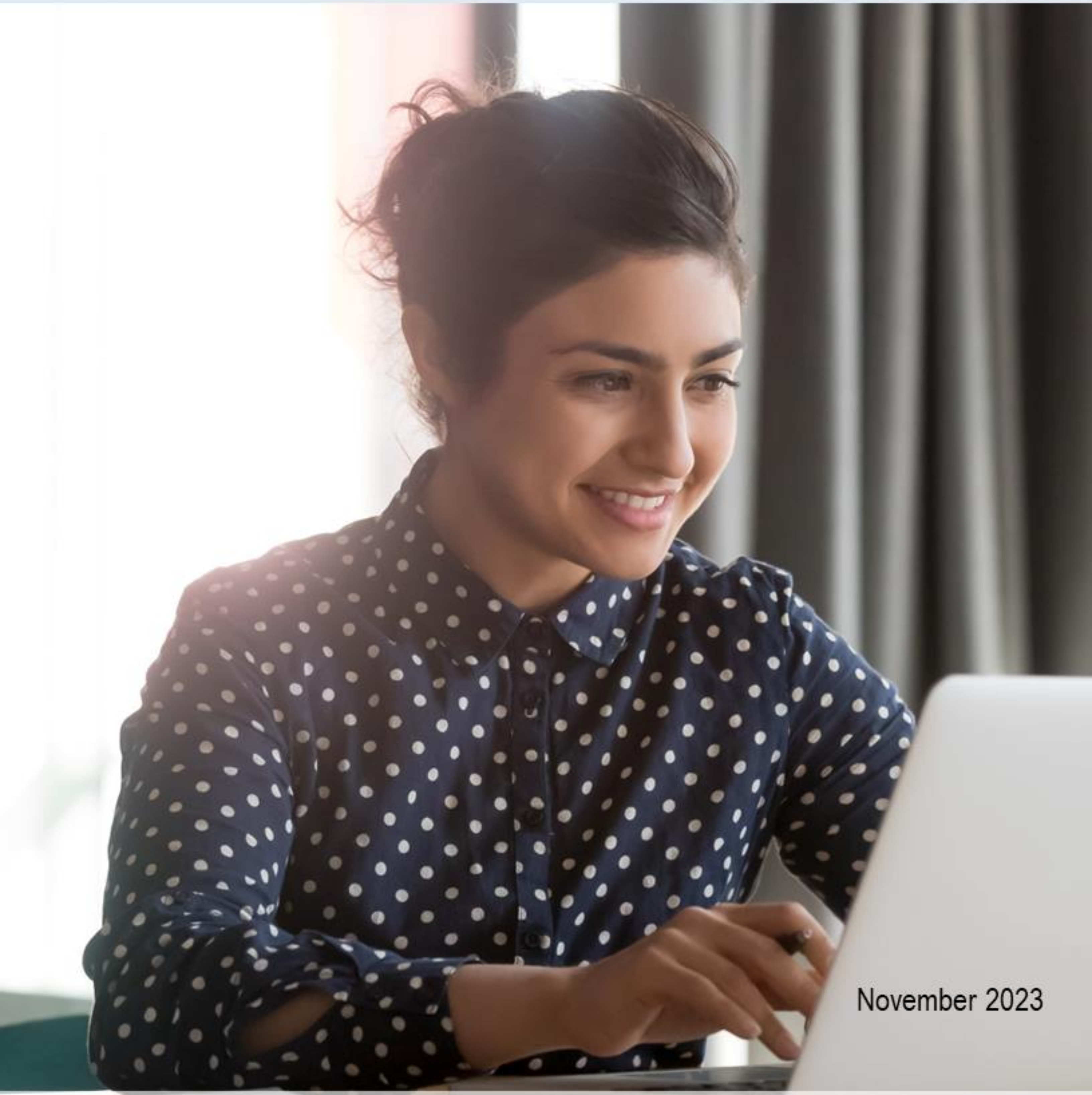
Request Center User Guide



November 2023

Table of Contents

Quick Start Summary

1) Select the request type that matches what you want to do:
    - Enroll New Group
    - SG Existing Group Changes – Fully Insured Only
    - Blue Balance Funded Enrollment
    - New Blue Balance Funded
    - Existing Blue Balance Funded to Fully Insured
    - COBRA or State Continuation
    - COBRA – HCSC Admin
    - Regulatory Data Update

2) Enter the requested information into the form

3) Add all required document attachments

4) Save and Submit your request

5) Keep an eye on your email for updates

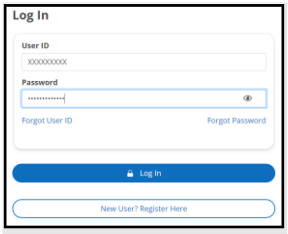
Important:

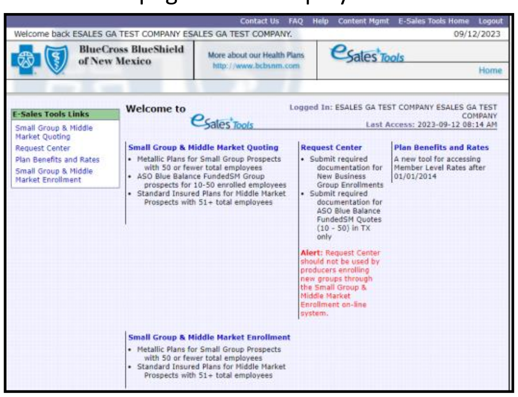
- If using the Enrollment Tool to enroll a new group, do not use Request Center
- Double-check the email you entered is where all request updates should go
- Make a note of your Request ID for easy follow-up

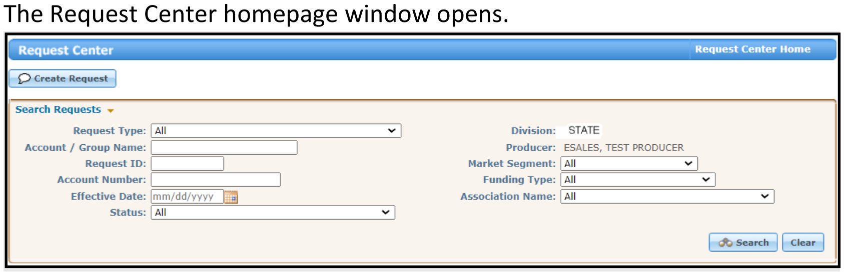
Step-by-step examples of all request types are shown below

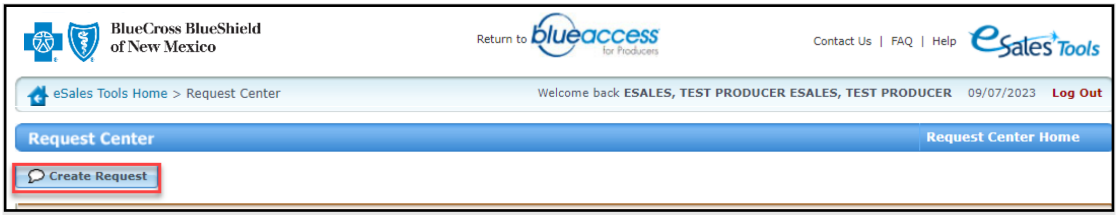
For technical support, email SGMM_TechSupport@hcsc.com

Welcome to the Request Center

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>Log In to Group Sales</td><td>Click on (or enter) this URL: https://www.bcbsnm.com/producer. Log in to Blue Access for Producers℠ (BAP℠).

BAP navigates to the Welcome page.</td></tr>
<tr><td>Group Sales Tools</td><td>Click on one of the Group Tools

eSales homepage will be displayed
</td></tr>
<tr><td>Access Request Center</td><td>Click on the Request Center link:

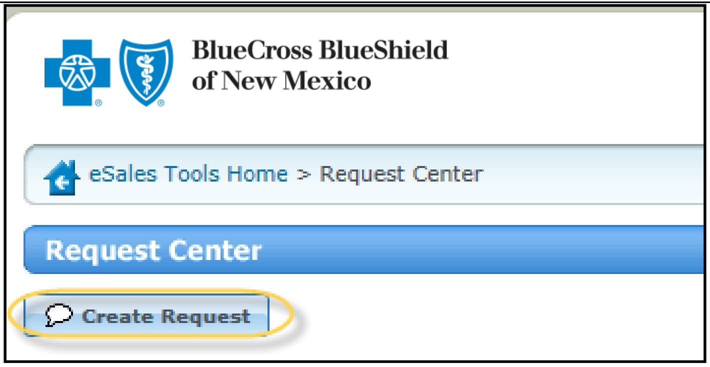

The Request Center homepage window opens.
</td></tr>
</table>

<table>
<tr>
<td>Request Center Homepage</td>
<td>
The Request Center homepage contains the following:
Create Request: this button is used to initiate an enrollment request.


Search Requests view contains the following:


Search Request: Allows user to search by the following:
Request Type: Defaults to All; use the drop-down to select different request type
Division: Defaults to your state
Account / Group Name: Type in name of group
Producer: Defaults to your ID
Request ID: Enter request ID (if applicable)
Market Segment: Defaults to All; use the drop-down to select the appropriate market segment (such as ACA Small Group (2–50), Small Group (10–50) Middle Market (51+), MEWA)
Account Number: Type in the group's account number
Effective Date: Enter or click on calendar icon to select effective date (mm/dd/yyyy)
Funding Type: Defaults to All; use the drop-down to select appropriate funding type (such as Fully Insured, ASO Blue Balance Funded℠)
Association Name: Used for Enrolling Association
Status: Defaults to All; use drop-down to select appropriate status
(Request Accepted for Submission, Request Discontinued for Submission, Request Info Needed, Request Initiated, Request Pending Internal Review, Std Mkts Account Processing In Progress, etc.)

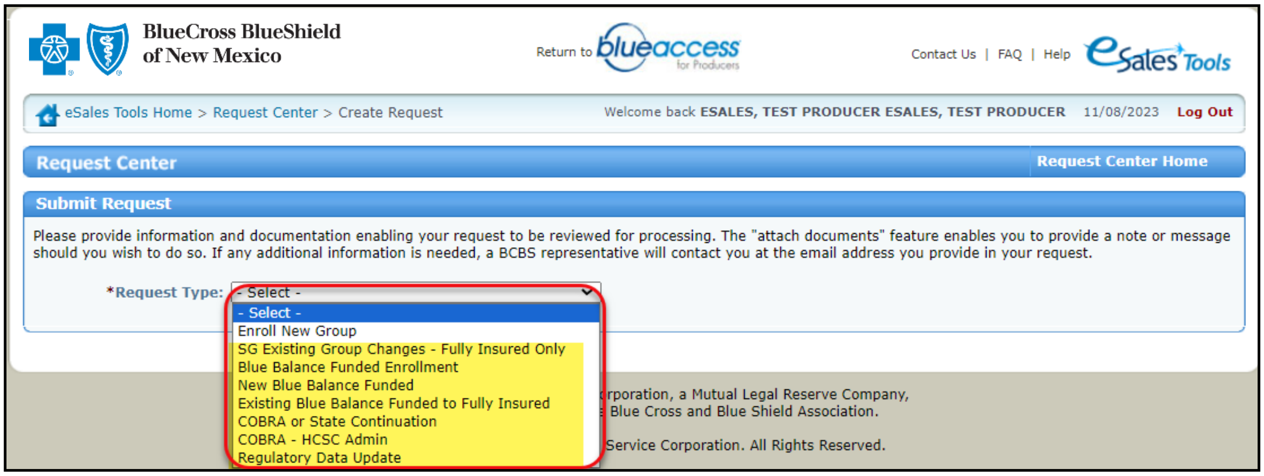
</td>
</tr>
<tr>
<td>Creating a Request</td>
<td>From the Request Center homepage, click on Create Request button.</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td>


</td>
</tr>
<tr>
<td>Request Page</td>
<td>
Result: The Submit Request page opens.


Note: To return to the Request Center homepage, click the Request Center Home button on the right.
</td>
</tr>
</table>

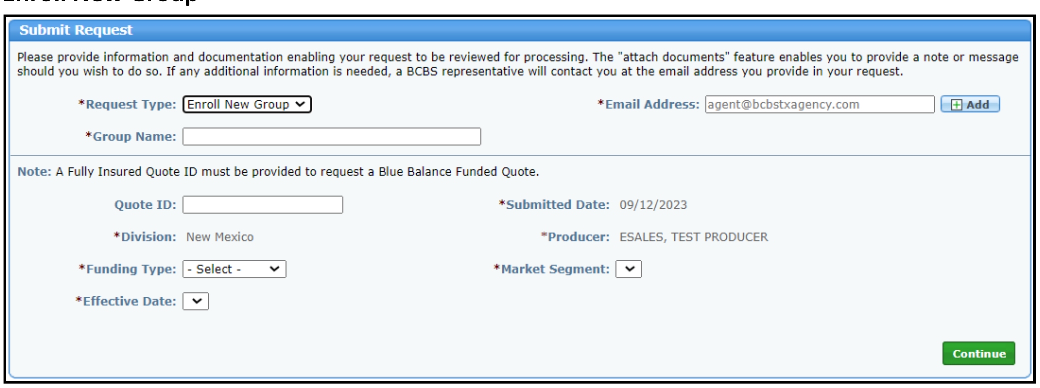
<table>
<tr>
<td>Request Type</td>
<td>
Request Type: Use the drop-down and select a Request Type:



Request Types:
Enroll New Group
SG Existing Group Changes – Fully Insured Only
Blue Balance Funded Enrollment
New Blue Balanced Funded
Existing Blue Balance Funded to Fully Insured
COBRA or State Continuation
COBRA – HCSC Admin
Regulatory Data Update

Note: Enroll New Group was an existing request type.
</td>
</tr>
<tr>
<td>Request Type Enroll New Group</td>
<td>
The Submit Request window expands and contains additional required fields when the following Request Type is selected:

Enroll New Group



Request Type: Select a request type from the drop-down
Email Address: Enter your email address in this field
Note: Additional email addresses can be entered by clicking on the Add button
Group Name: Enter the group name listed on paperwork
Quote ID: Enter Quote number (if applicable)
Submitted Date: Defaults to today’s date

</td>
</tr>
</table>

<table>
<tr>
<td></td>
<td>

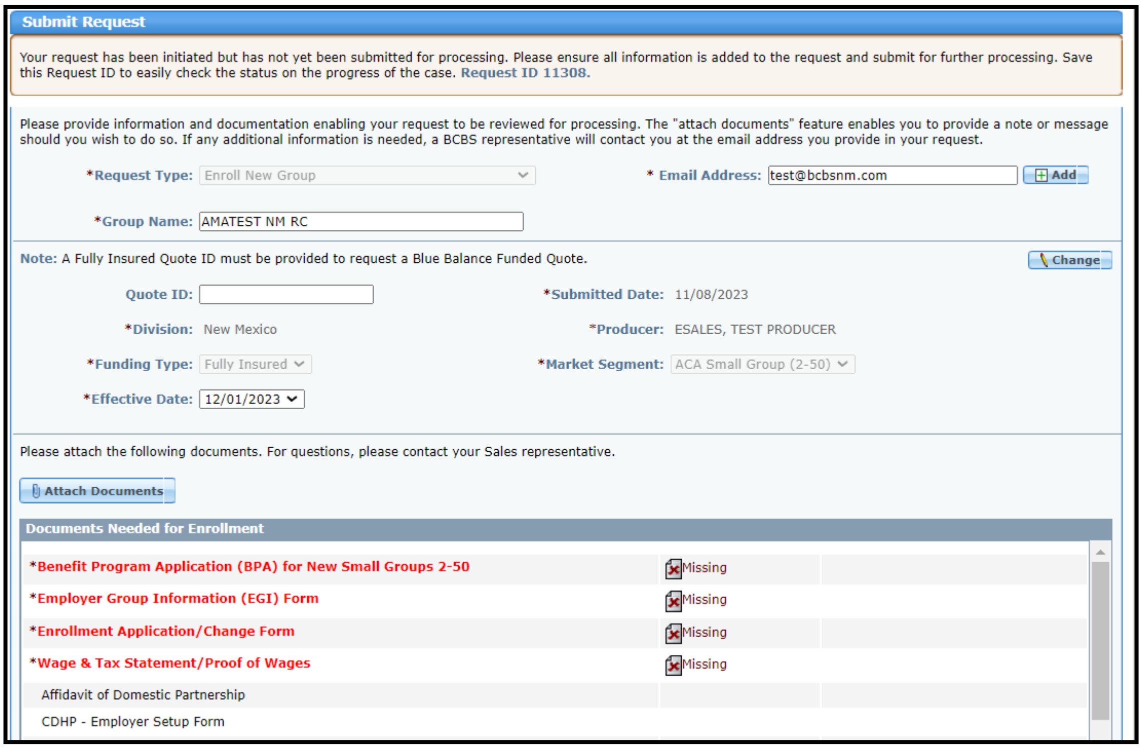
- **Division:** Defaults to your state
- **Producer:** Defaults to user
- **Funding Type:** Use the drop-down and select Fully Insured
- **Market Segment:** Use the drop-down and select ACA Small Group (2–50)
- **Effective Date:** Use the drop-down to select appropriate effective date of new group

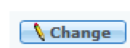
Once all required information is entered, click Continue. 

PLEASE NOTE: This Request Type is not needed if group is being enrolled through the Enrollment Tool.

</td>
</tr>
<tr>
<td>Submit Request</td>
<td>

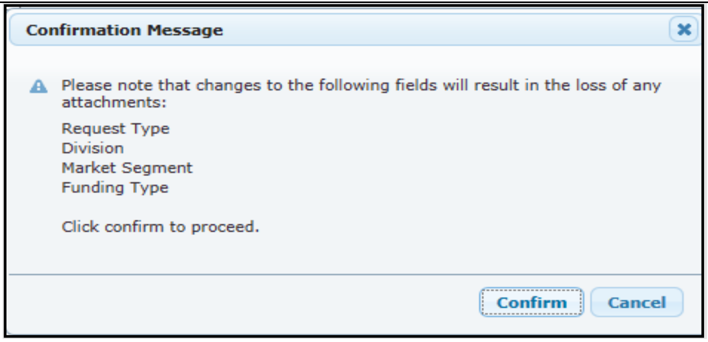
A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submitted for further processing. Save this Request ID to easily check the status on the progress of the case. A **Request ID** number is assigned, and the Documents Needed for Enrollment pane opens for Request Type: **Enroll New Group.**



Note: If a change is needed for the Effective Date field, click **Change.** 

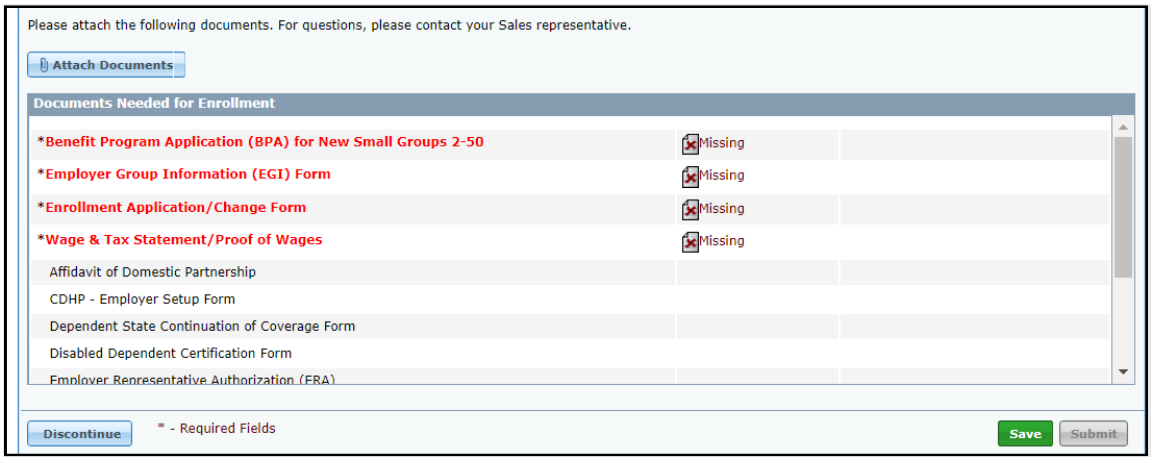
<u>IMPORTANT NOTE:</u> If changes are needed in these fields, the change should be completed PRIOR to attaching any documents to the request. Once the Change button is selected, a confirmation message populates letting you know that changes made to specific fields will result in the loss of any attachments.

</td>
</tr>
</table>

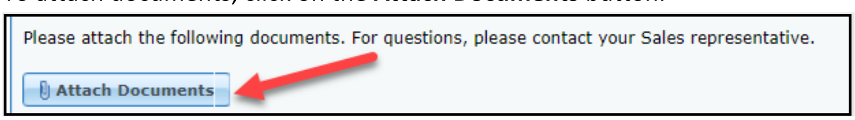


Attach Required Documents

In the **Documents Needed for Enrollment** section, all required documents will appear in RED font and have an asterisk (*) on the far-left side.



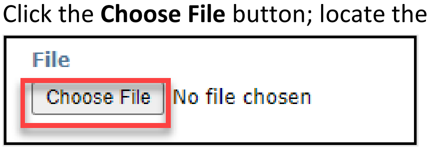
To attach documents, click on the **Attach Documents** button.



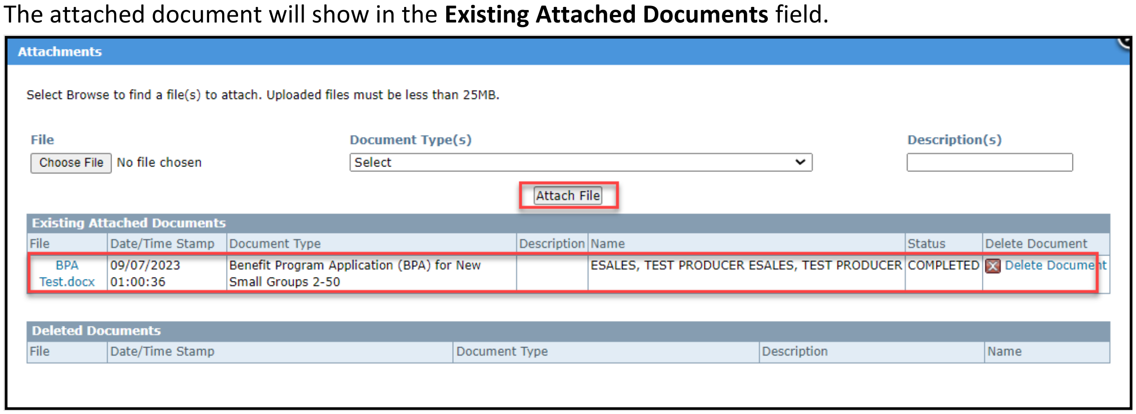
The Attachments window opens.

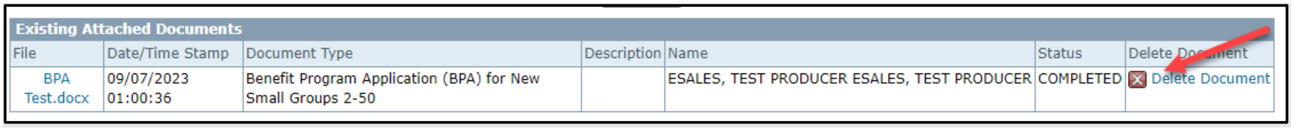
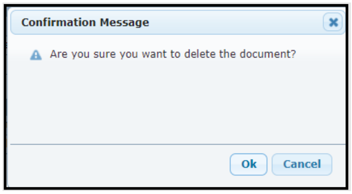
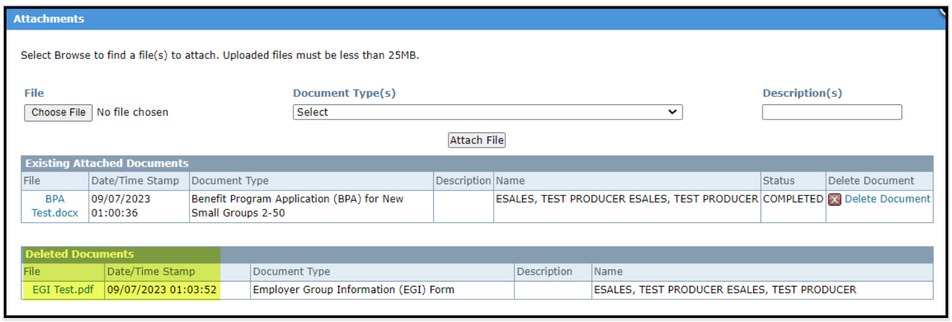
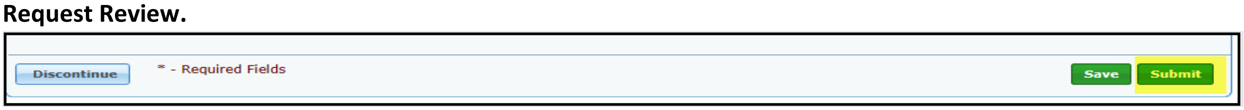
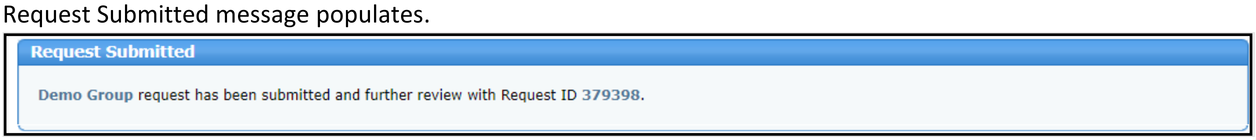
Attach Required Documents

Click the **Choose File** button; locate the drive and folder where the documents are saved and select the file to upload.



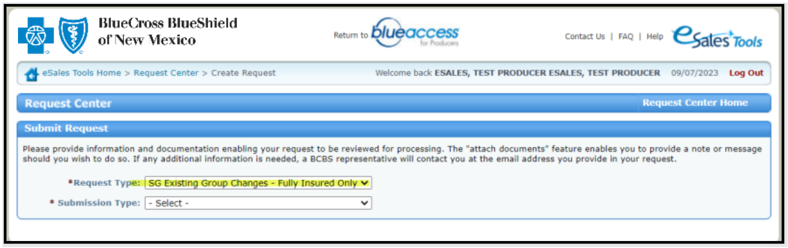
Select from the Document Type(s) drop-down and click on the **Attach File** button.
The attached document will show in the **Existing Attached Documents** field.



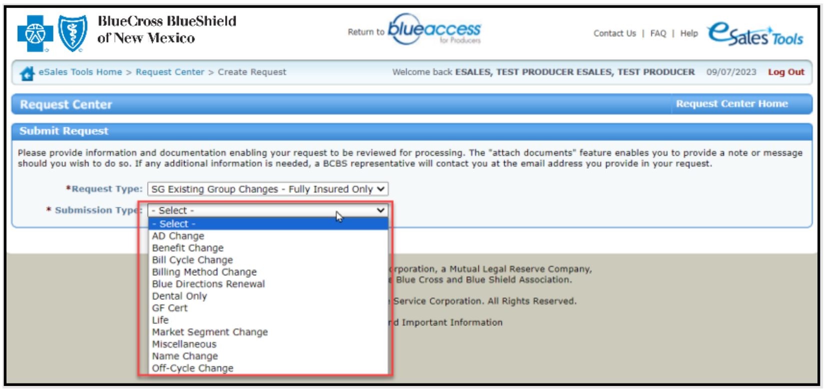
Delete Documents	If the wrong document was attached, click on the **Delete Document** link to remove it from the list.  A confirmation message populates asking if you are sure you want to delete the document. Select OK or Cancel (whichever applies).  The deleted document will then show in the **Deleted Documents** section.  **Note:** Deleted documents will not transfer from Request Center to enrollment, however they will be retained in Request Center for audit purposes. If paperwork for another group was accidentally attached, you must discontinue the request and start over. Deleted documents can still be viewed.
Submit Request	Once documents have been attached, click on the (X) in the top right-hand corner of the Attachments window to close. Click the **Save** button to verify all information is entered correctly and click **Submit** button to move the case to **Request Review.**  Request Submitted message populates. 

Request Type SG Existing Group Changes – Fully Insured Only

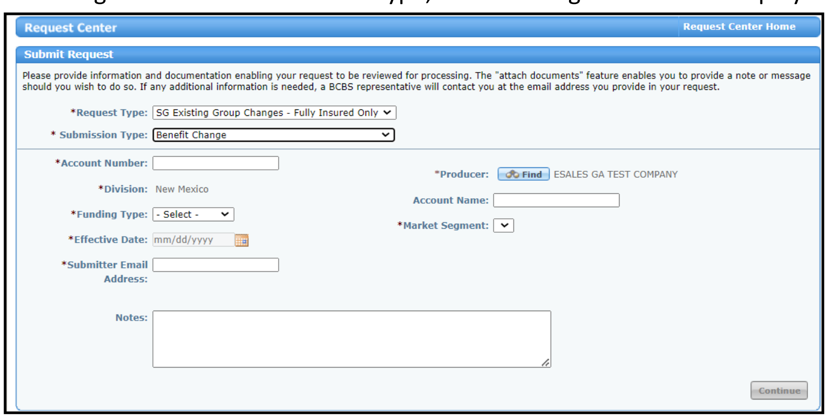
The Submit Request window expands and contains additional required fields when the following request type is selected: **SG Existing Group Changes – Fully Insured Only**



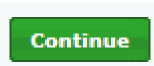
Select a Submission Type from the drop-down:



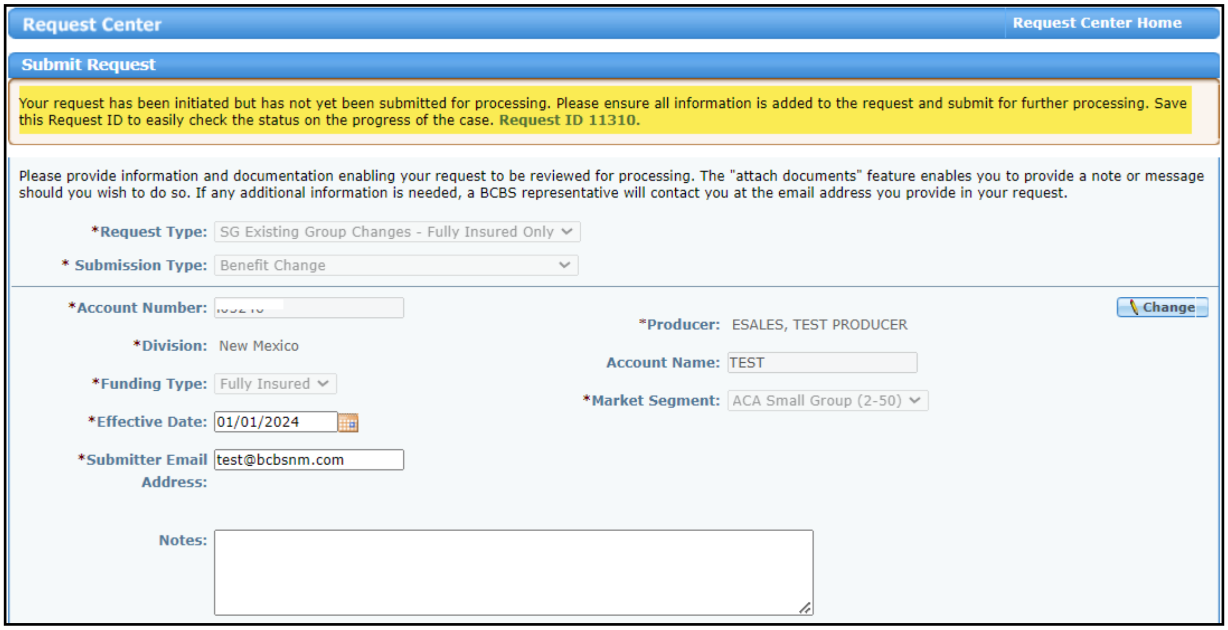
Following selection of Submission Type, the following fields will be displayed:

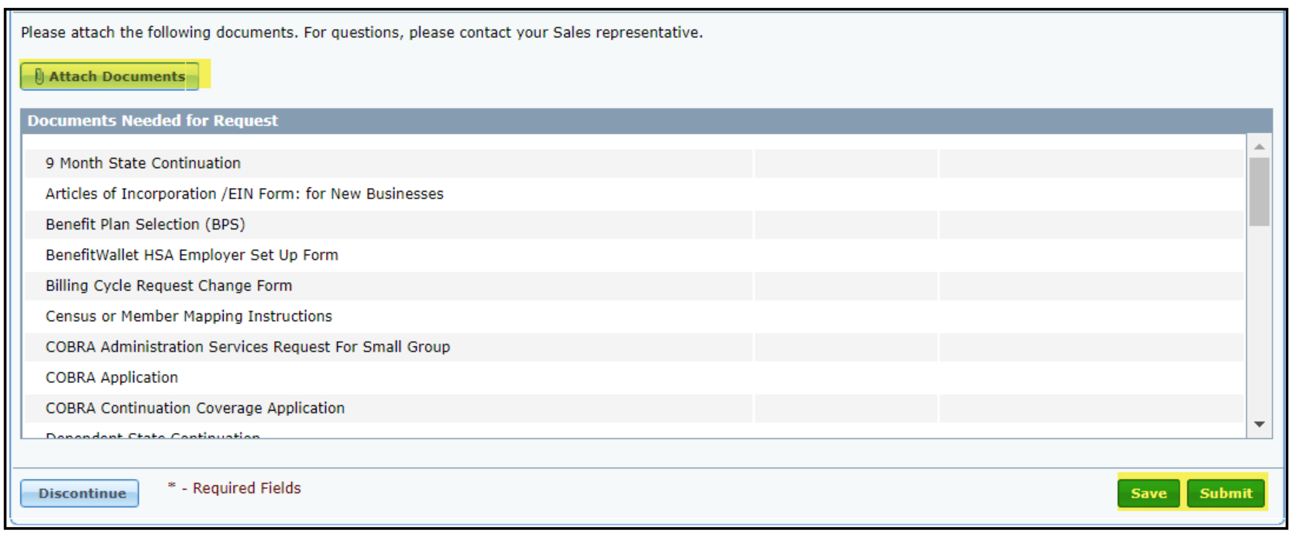


- **Account Number:** Enter the account number
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered
- **Funding Type:** Populates when account number and division are entered
- **Market Segment:** Populates when account number and division are entered
- **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

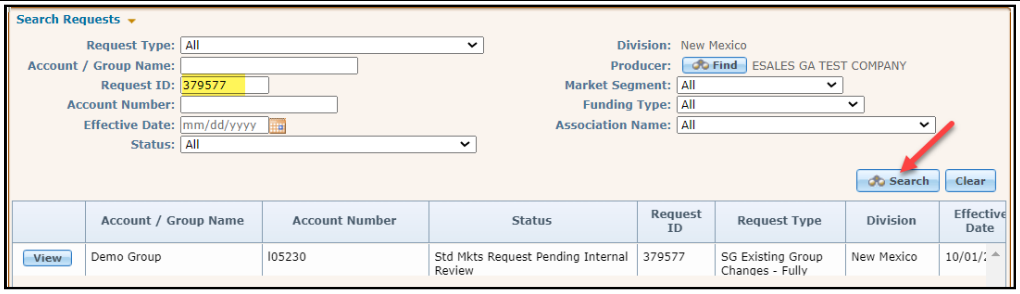


Once all required information is entered, click Continue.

<table>
<tr>
<td>Submit Request</td>
<td>A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: SG Existing Group Changes – Fully Insured Only.
Follow the Attach Document step above to attach any documents and click on save and submit the request.




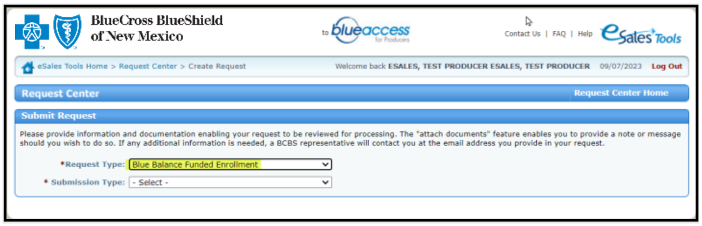
The request is now submitted for review.</td>
</tr>
<tr>
<td>Review Request</td>
<td>To review your request, search for it on the Request Center homepage using criteria available and click Search.</td>
</tr>
</table>



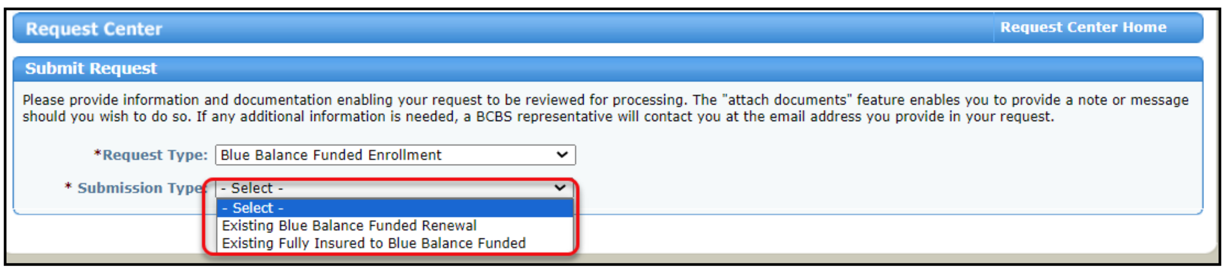
To view information, you can select the **View** button next to the account.

Request Type Blue Balance Funded Enrollment

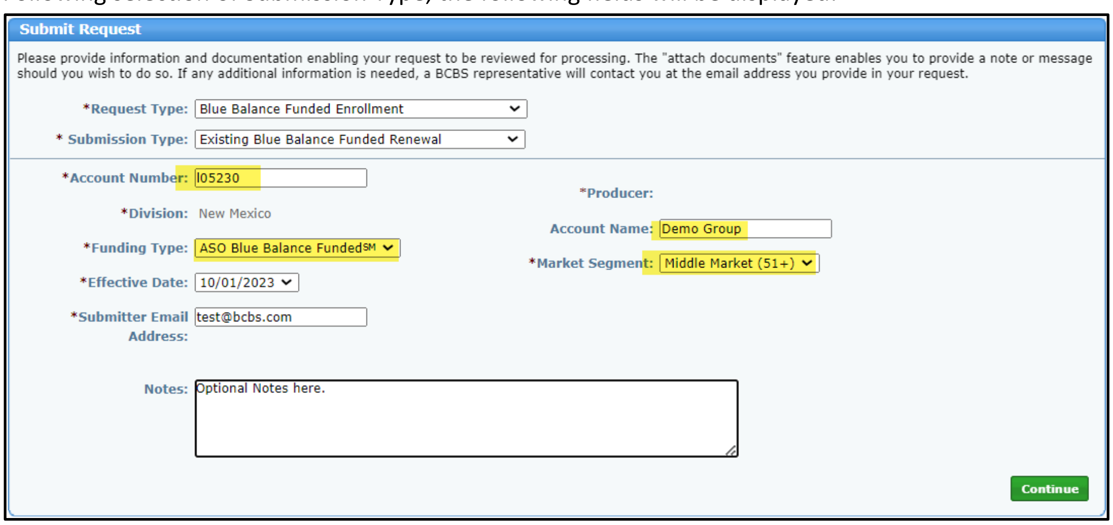
The Submit Request window expands and contains additional required fields when the following request types are selected: **Blue Balance Funded Enrollment**



Select a Submission Type from the drop-down:



Following selection of Submission Type, the following fields will be displayed:



- **Account Number:** Enter the Account Number
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered or can be manually entered
- **Funding Type:** Populates when account number and division are entered or can be selected from drop-down

<table>
<tr>
<td></td>
<td>

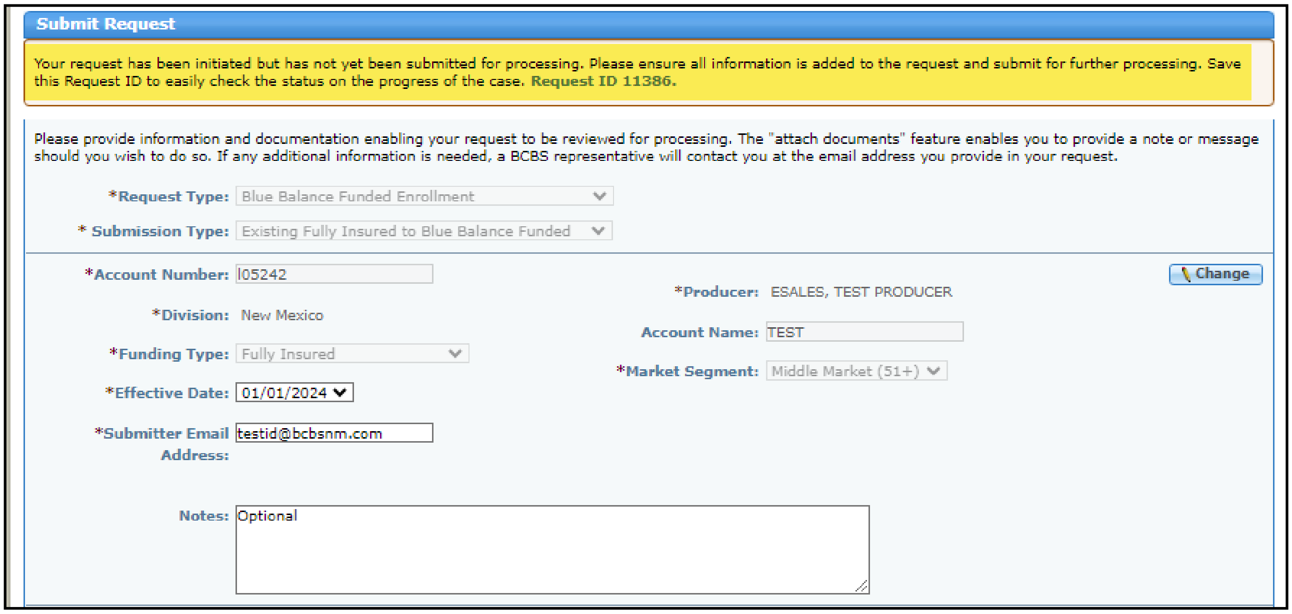
- **Market Segment:** Populates when account number and division are entered or can be selected from drop-down
- **Effective Date:** Use the drop-down to select appropriate effective date of the group
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

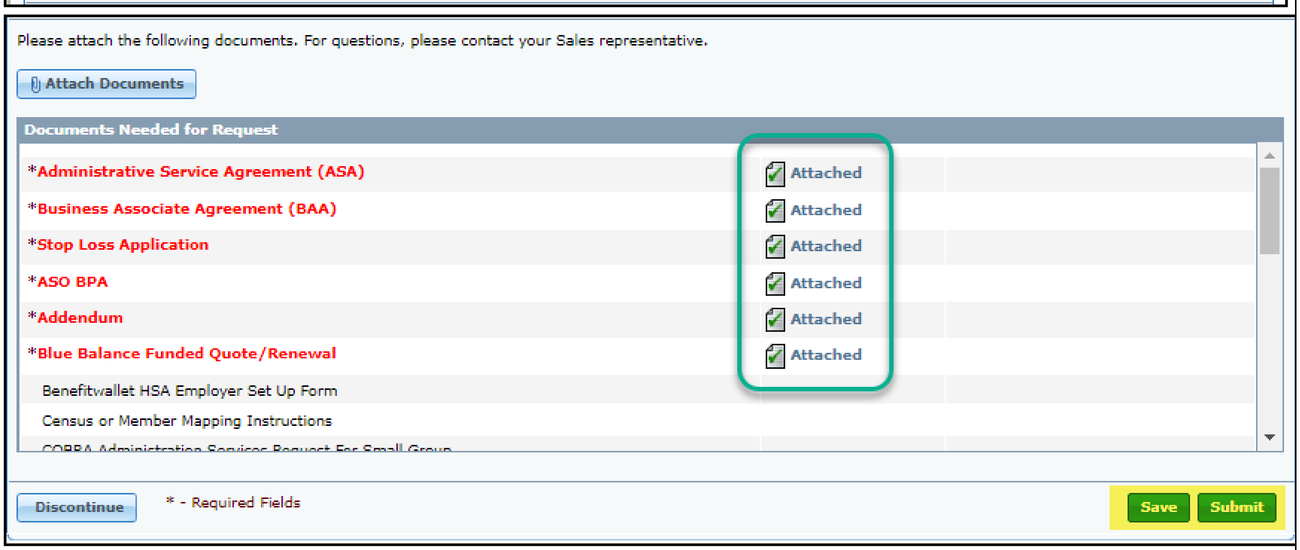
Once all required information is entered, click Continue. **Continue**

</td>
</tr>
<tr>
<td>Submit Request</td>
<td>

A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Blue Balance Funded Enrollment.**

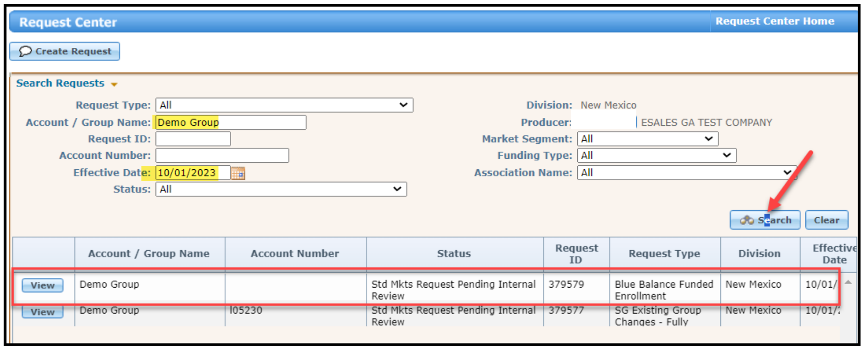
Follow the Attach Document step above to attach any documents and click on save and submit the request.



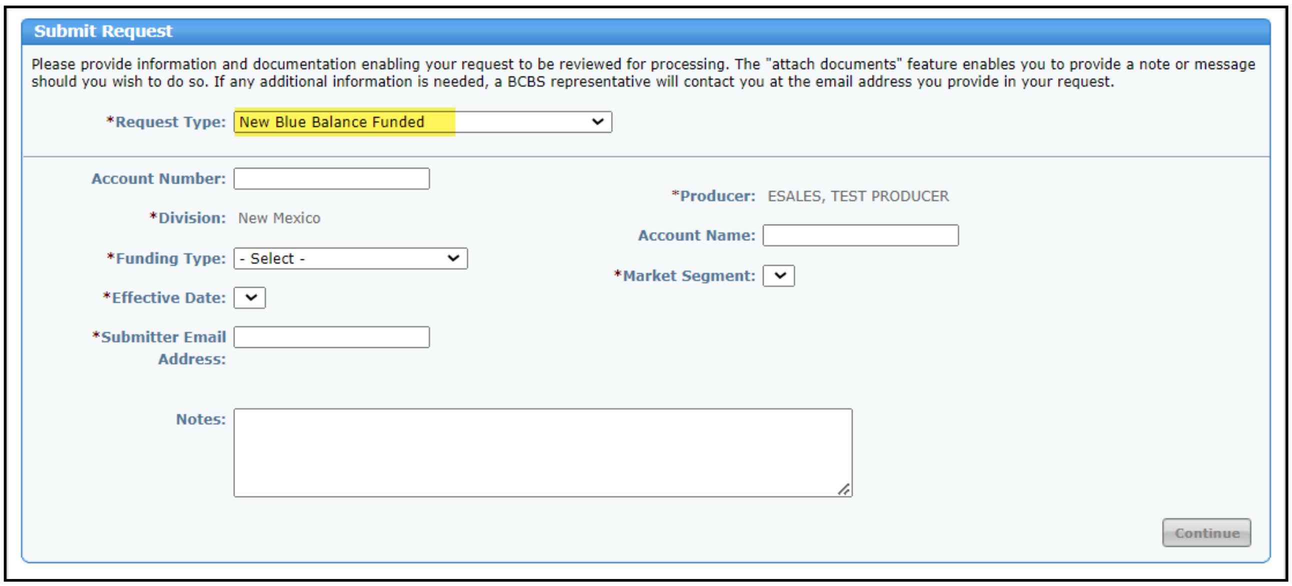


The request is now submitted for review.

</td>
</tr>
</table>

<table>
<tr>
<td>Review Request</td>
<td>To review your request, search for it on the Request Center homepage using criteria available and click Search.


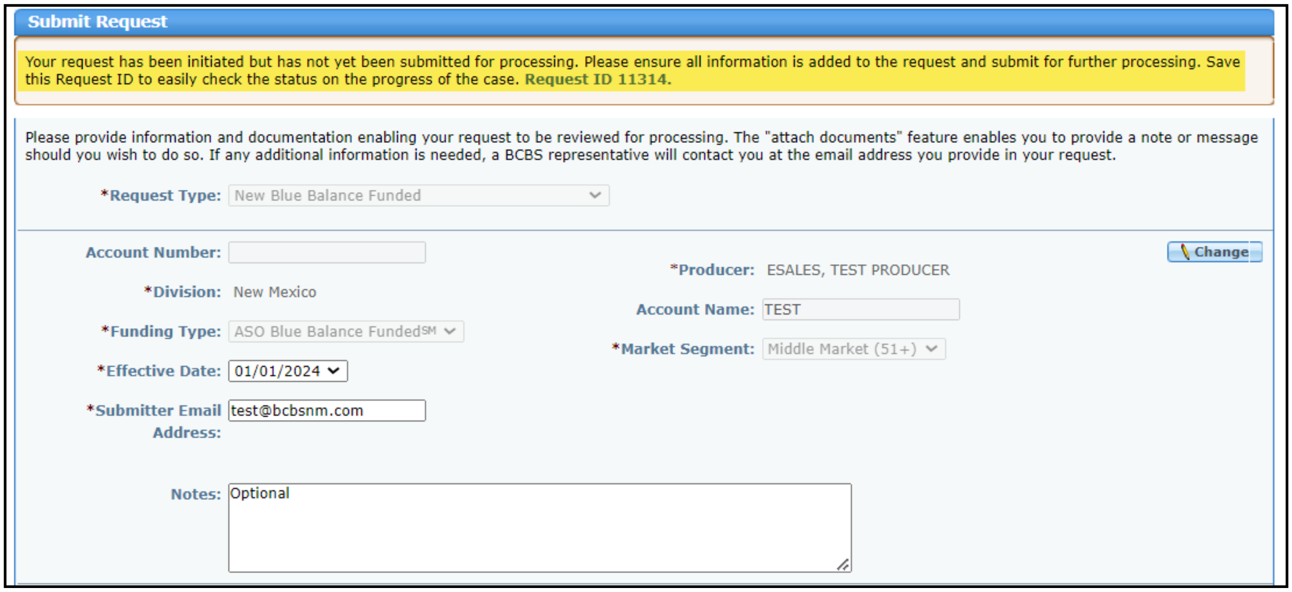
To view information, you can select the View button next to the account.</td>
</tr>
<tr>
<td>Request Type New Blue Balance Funded</td>
<td>The Submit Request window expands and contains additional required fields when the following request type is selected:

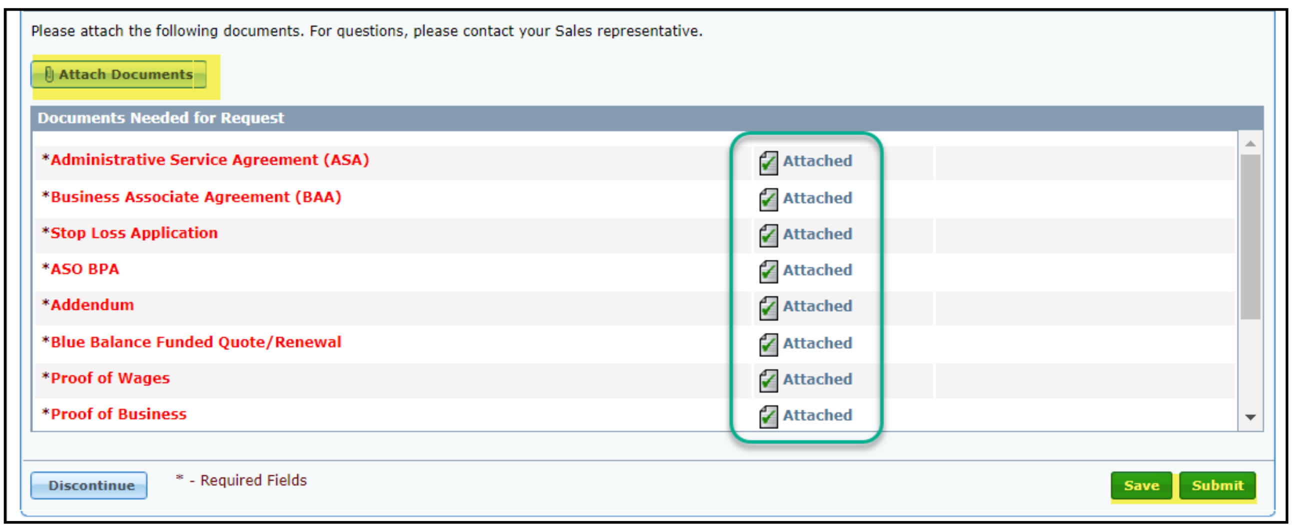
New Blue Balance Funded


Account Number: Enter the Account Number (If applicable)
Division: Defaults to your state
Account Name: Recommended but not required to enter
Funding Type: Select from drop-down
Market Segment: Select from drop-down
Effective Date: Select from drop-down
Submitter Email Address: Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
Notes: Type in notes if needed (optional)

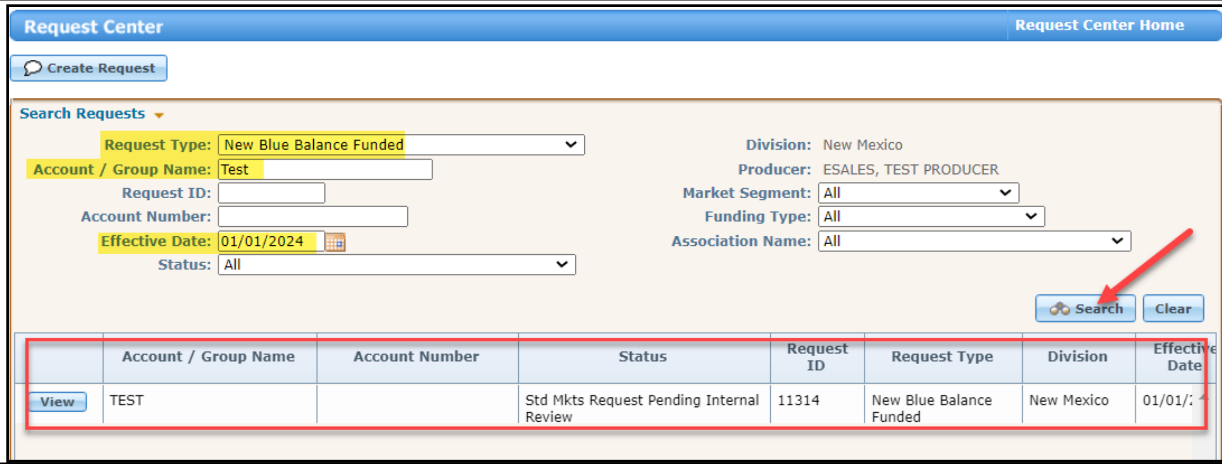
Once all required information is entered, click Continue. 
</td>
</tr>
</table>

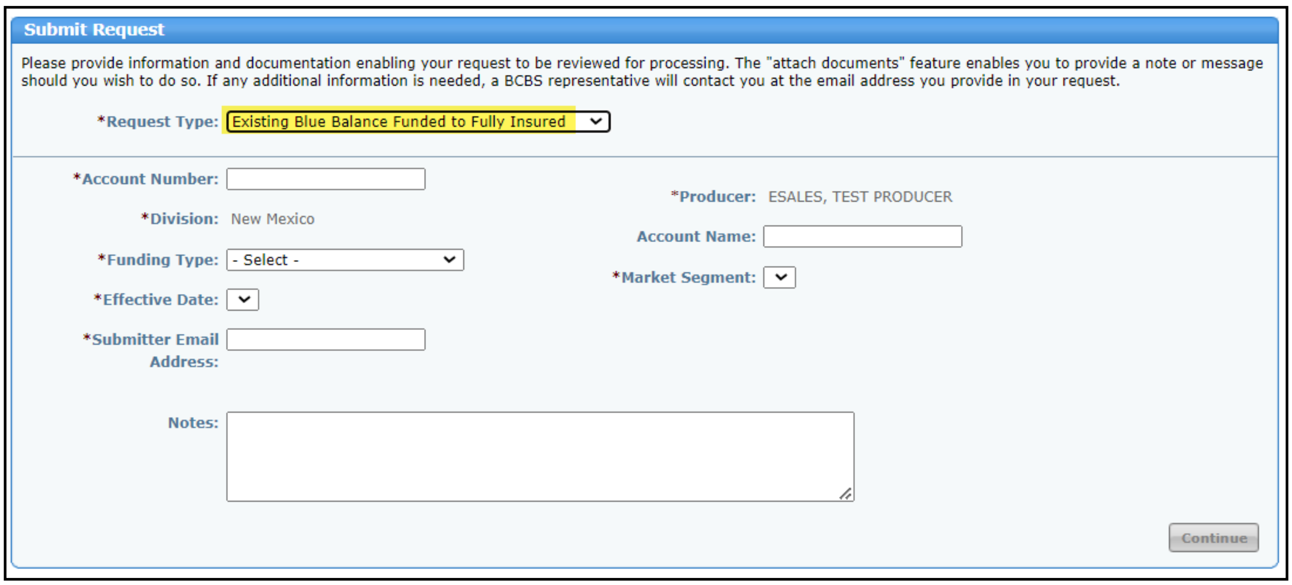
<table>
<tr>
<td>Submit Request</td>
<td>
A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: New Blue Balance Funded.
Follow the Attach Document step above to attach any documents and click on save and submit the request.





The request is now submitted for review.
</td>
</tr>
<tr>
<td>Review Request</td>
<td>To review your request, search for it on the Request Center homepage using criteria available and click Search.</td>
</tr>
</table>

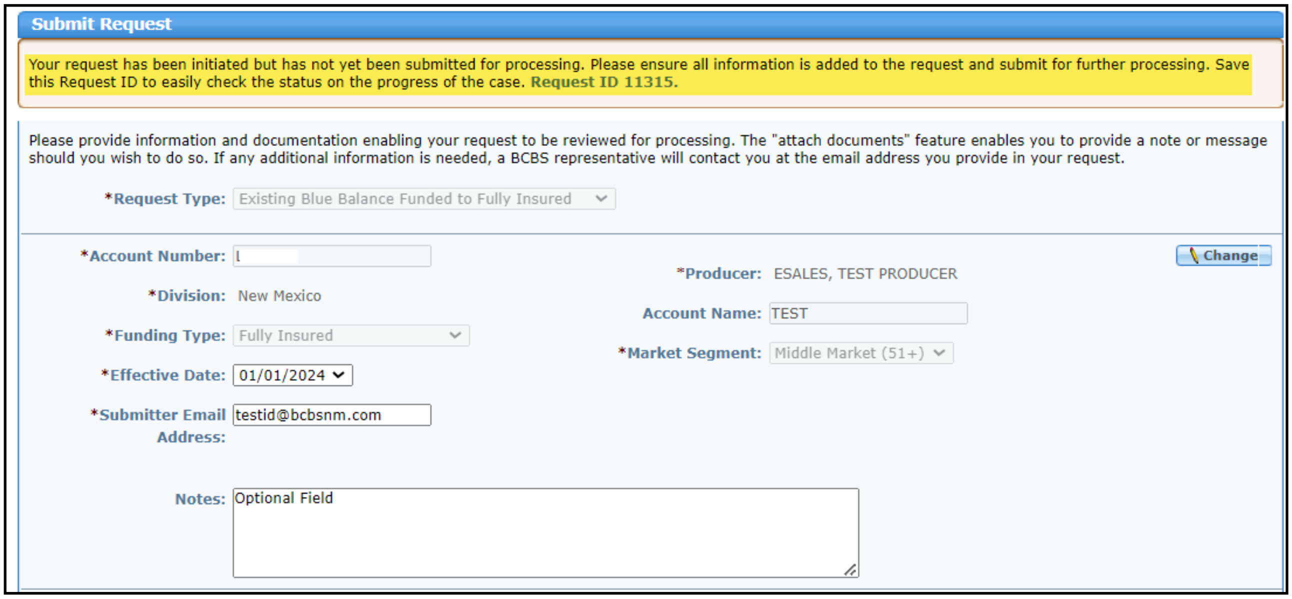
<table>
<tr>
<td></td>
<td>


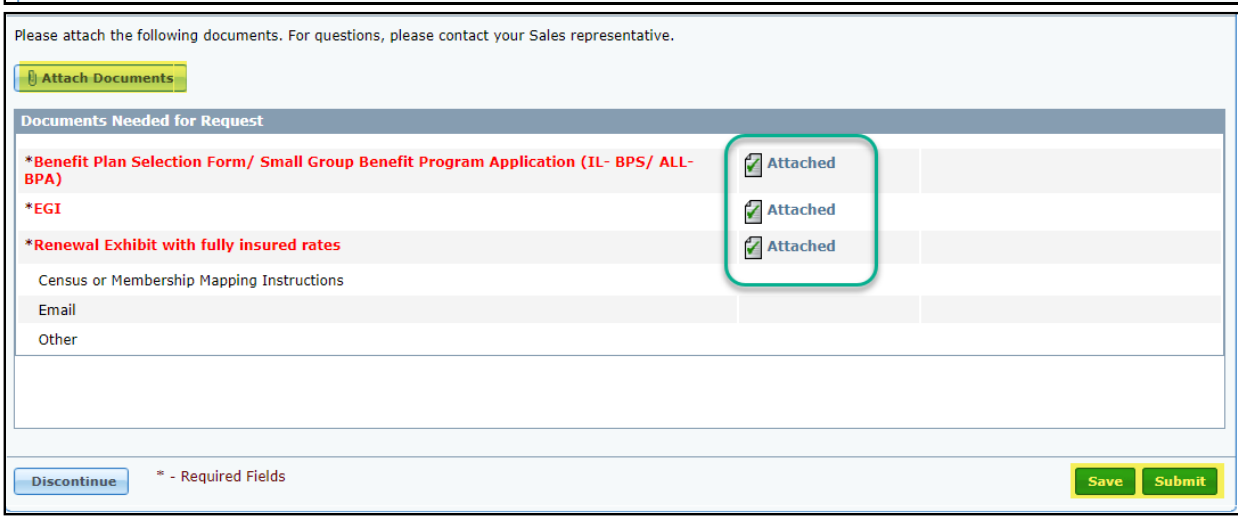
</td>
</tr>
<tr>
<td>Request Type Existing Blue Balance Funded to Fully Insured</td>
<td>
The Submit Request window expands and contains additional required fields when the following request type is selected:
Existing Blue Balance Funded to Fully Insured


Account Number: Enter the Account Number
Division: Defaults to your state
Account Name: Populates when account number and division are entered
Funding Type: Populates when account number and division are entered
Market Segment: Populates when account number and division are entered
Effective Date: Select from the drop-down
Submitter Email Address: Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
Notes: Type in notes if needed (optional)

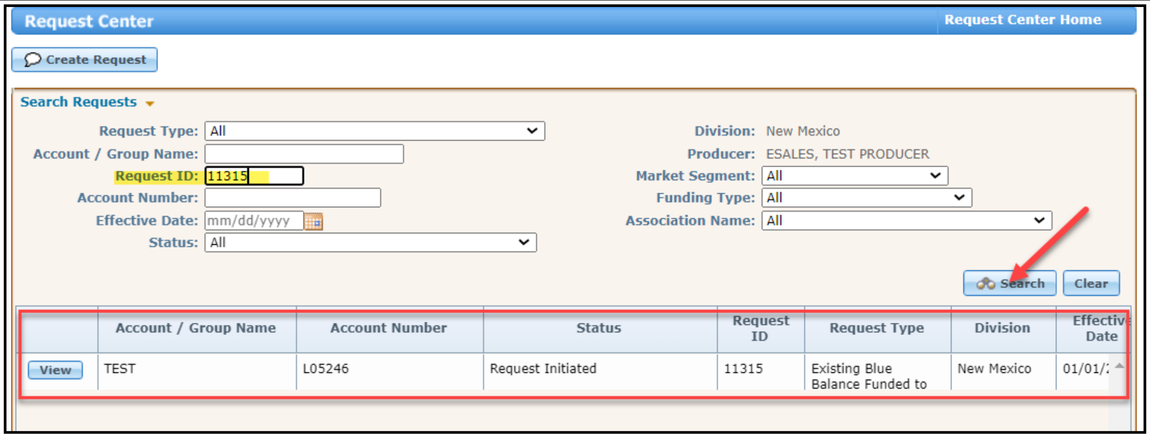
Once all required information is entered, click Continue. 

</td>
</tr>
</table>

<table>
<tr>
<td>Submit Request</td>
<td>A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: Existing Blue Balance Funded to Fully Insured.
Follow the Attach Document step above to attach any documents and click on save and submit the request.




The request is now submitted for review.</td>
</tr>
<tr>
<td>Review Request</td>
<td>To review your request, search for it on the Request Center homepage using criteria available and click Search.</td>
</tr>
</table>

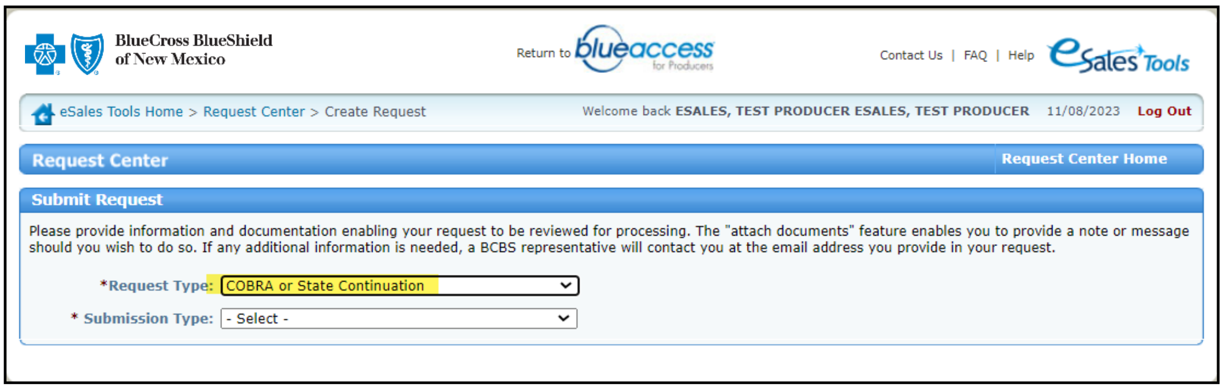
<table>
<tr>
<td></td>
<td>


To view information, you can select the **View** button next to the account.
</td>
</tr>
<tr>
<td>

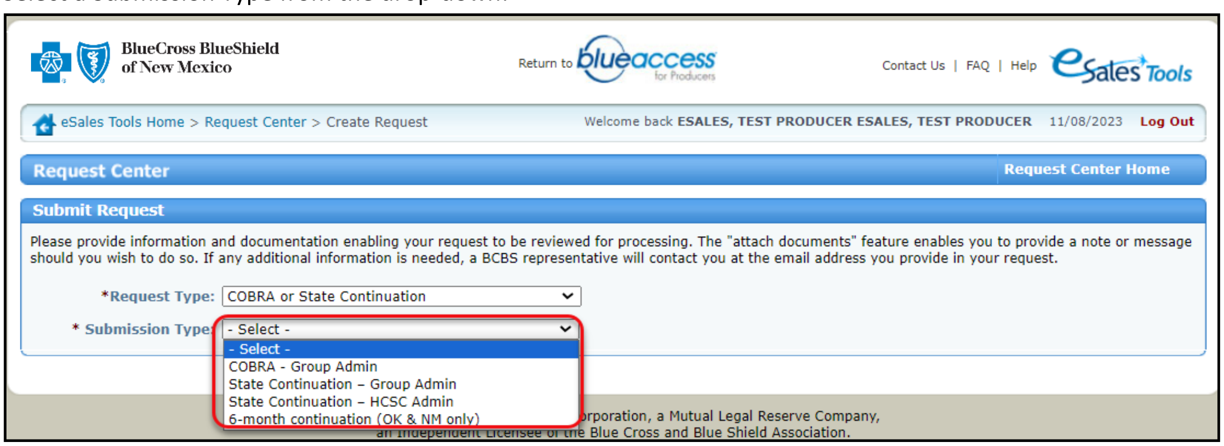
Request Type COBRA or State Continuation

</td>
<td>
The Submit Request window expands and contains additional required fields when the following request type is selected:

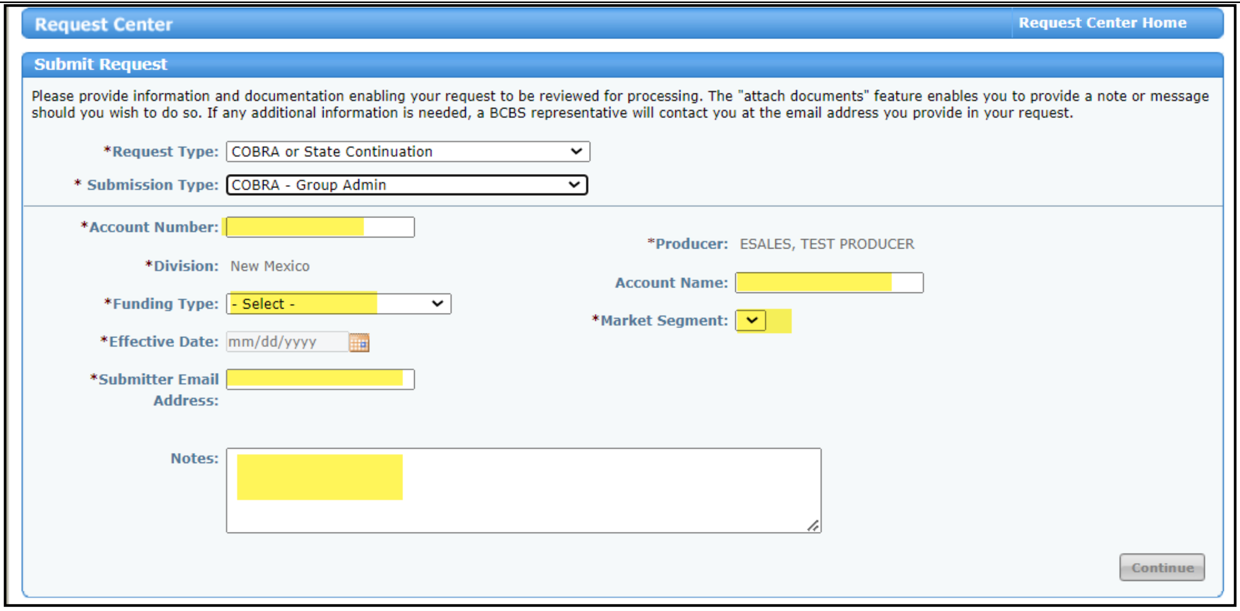
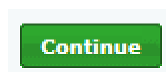
COBRA or State Continuation



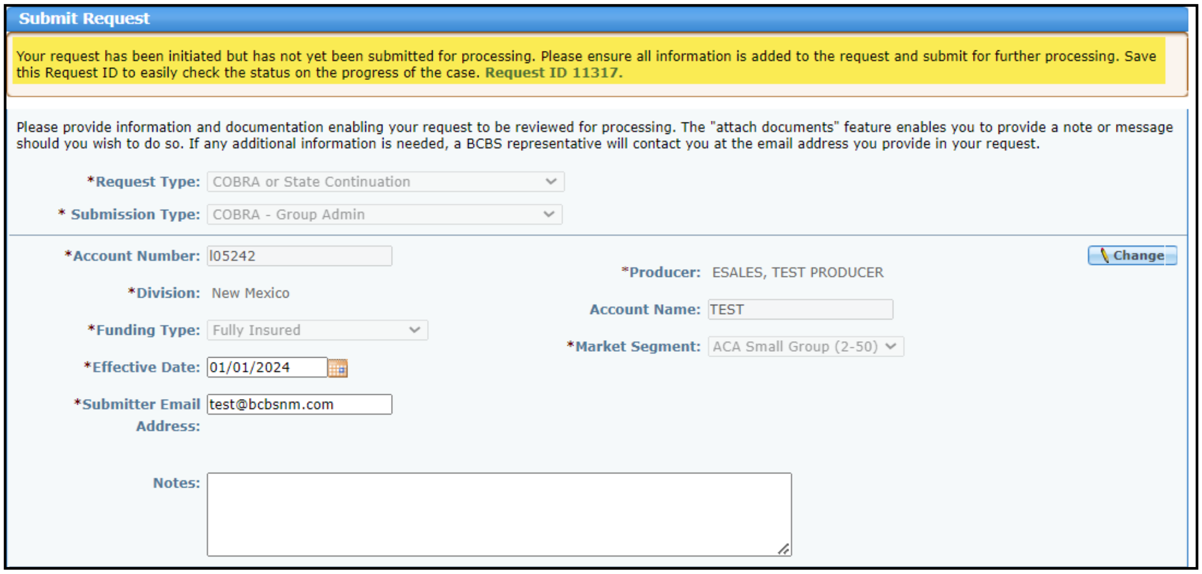
Select a Submission Type from the drop-down:

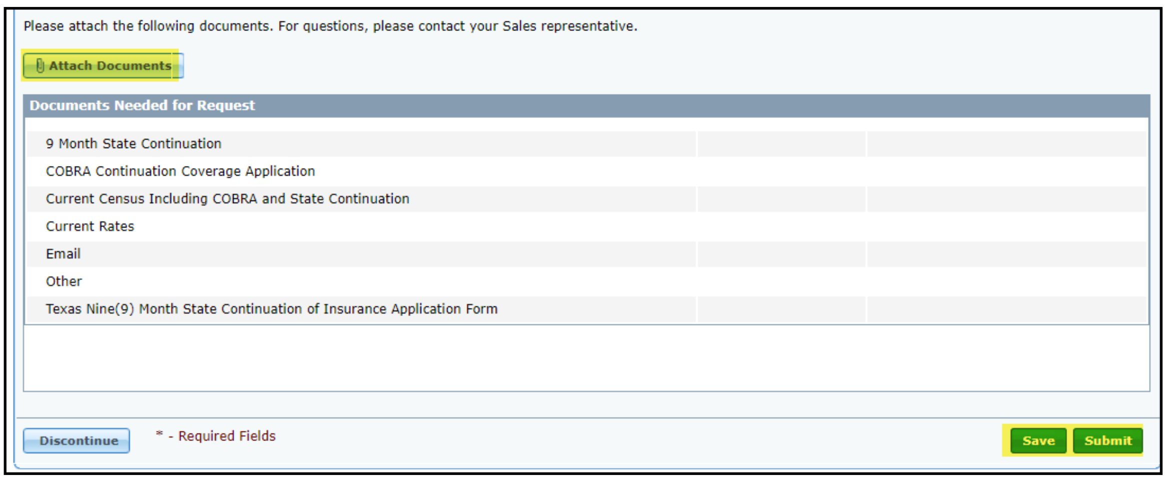


Following selection of Submission Type, the following fields will be displayed:
</td>
</tr>
</table>

	 • **Account Number:** Enter the account number • **Division:** Defaults to your state • **Account Name:** Populates when account number and division are entered • **Funding Type:** Populates when account number and division are entered or can be selected from drop-down • **Market Segment:** Populates when account number and division are entered • **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy) • **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission) • **Notes:** Type in notes if needed (optional) Once all required information is entered, click Continue. 
Submit Request	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **COBRA or State Continuation.**

Follow the Attach Document step above to attach any documents and click on save and submit the request.

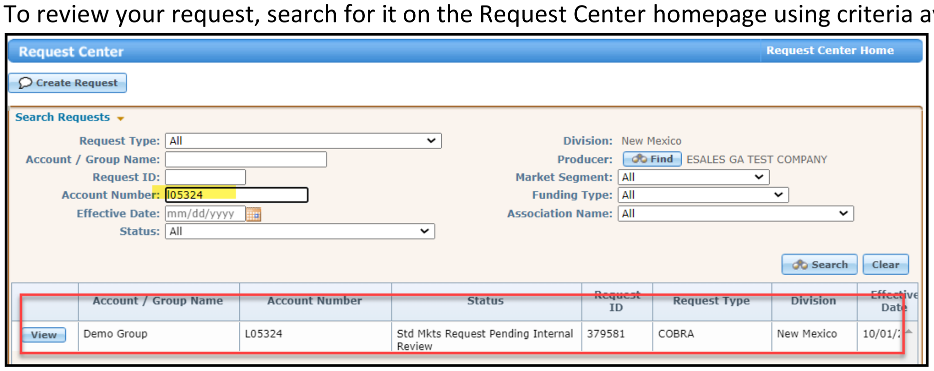




The request is now submitted for review.

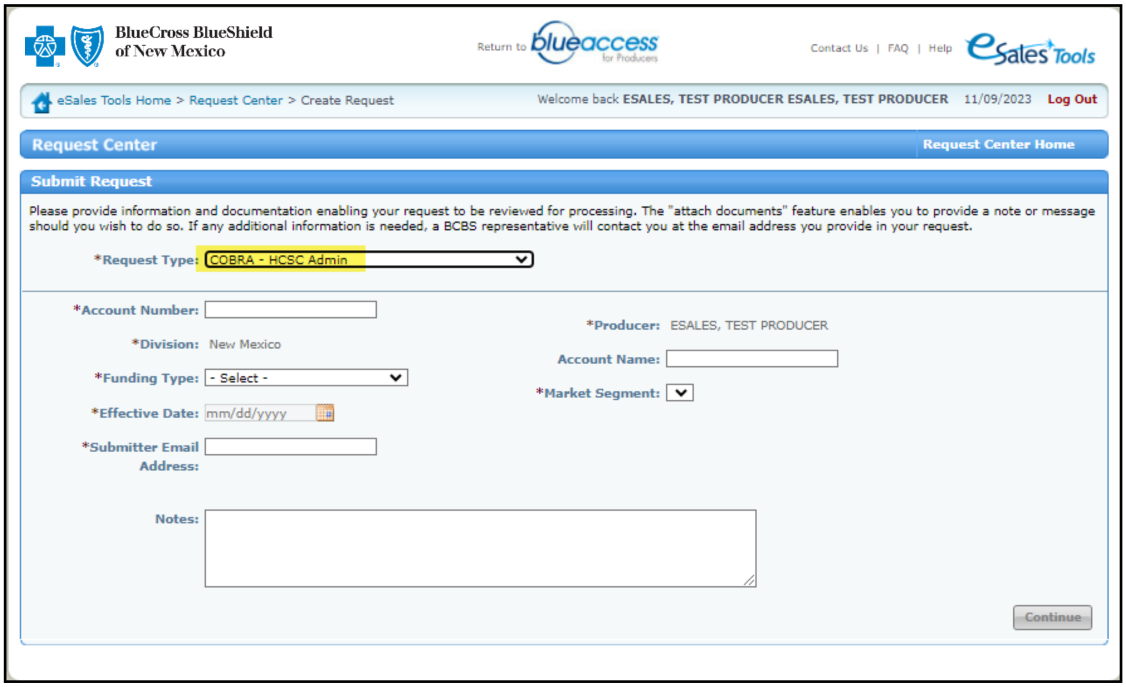
Review Request

To review your request, search for it on the Request Center homepage using criteria available and click **Search**.



To view information, you can select the **View** button next to the account.

<table>
<tr>
<td>Request Type COBRA – HCSC Admin</td>
<td>
The Submit Request window expands and contains additional required fields when the following request type is selected:

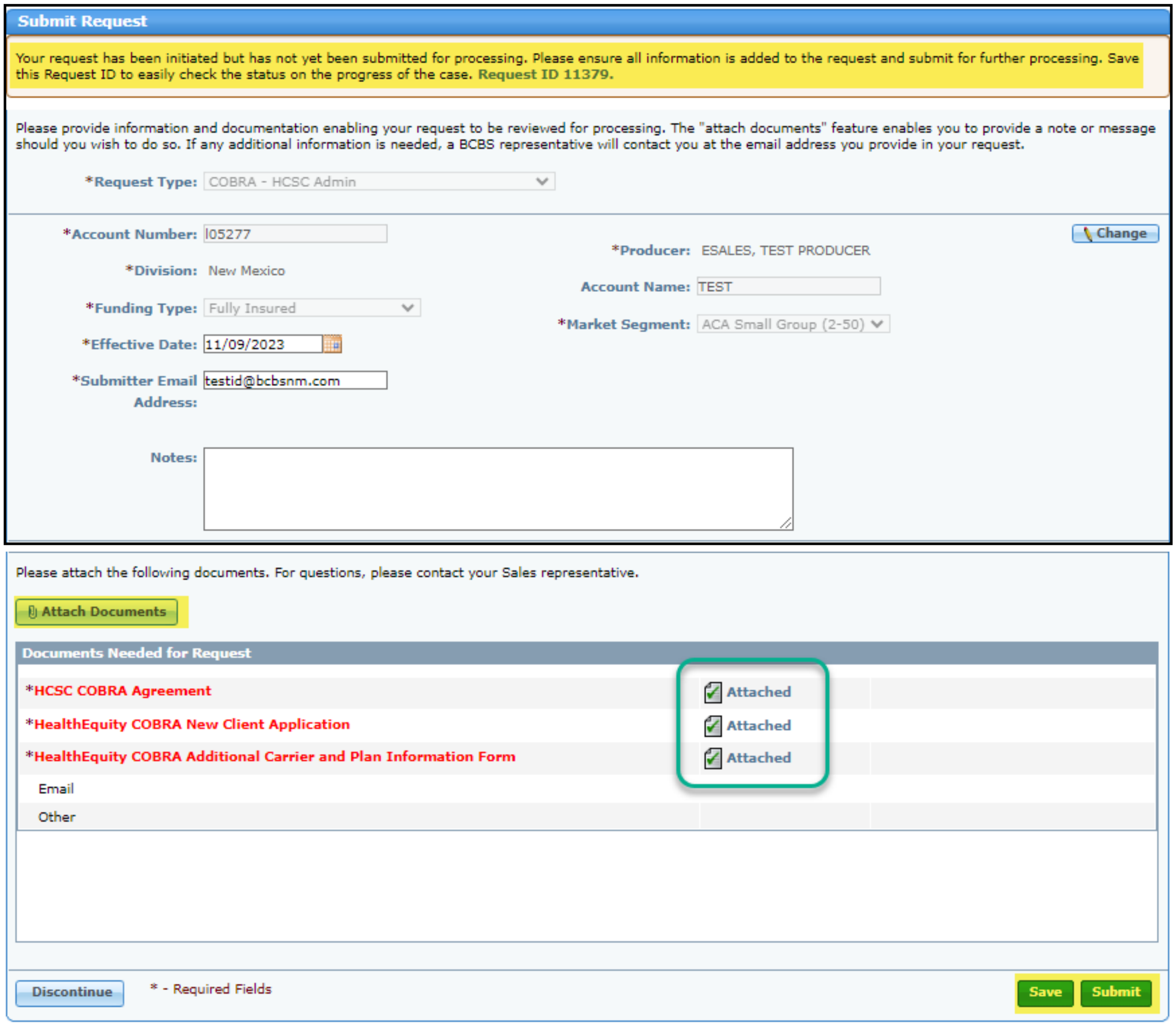
COBRA – HCSC Admin


Account Number: Enter the Account Number
Division: Defaults to your state
Account Name: Populates when account number and division are entered
Funding Type: Populates when account number and division are entered
Market Segment: Populates when account number and division are entered
Effective Date: Enter or click on calendar icon to select effective date (mm/dd/yyyy)
Submitter Email Address: Type in the email address of the person submitting the form
(Please note: this person will receive all communication on the progress of the submission)
Notes: Type in notes if needed (optional)

Once all required information is entered, click Continue. 

</td>
</tr>
<tr>
<td>Submit Request</td>
<td>A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: COBRA – HCSC Admin.</td>
</tr>
</table>

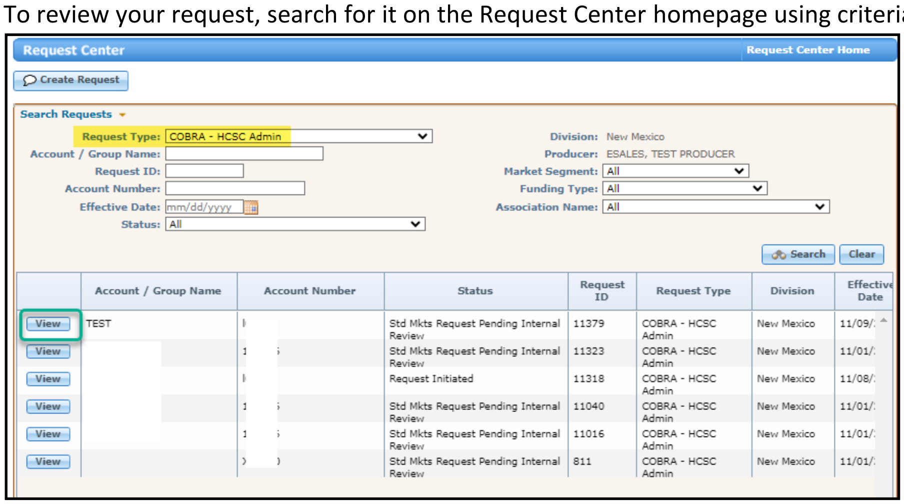
Follow the Attach Document step above to attach any documents and click on save and submit the request.



The request is now submitted for review.

Review Request

To review your request, search for it on the Request Center homepage using criteria available and click **Search**.



To view information, you can select the **View** button next to the account.

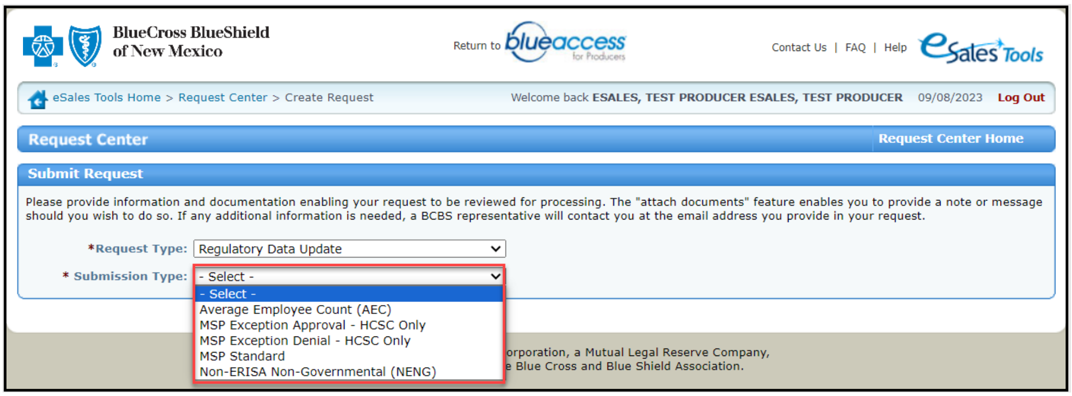
Request Type Regulatory Data Update

The Submit Request window expands and contains additional required fields when the following request type is selected:

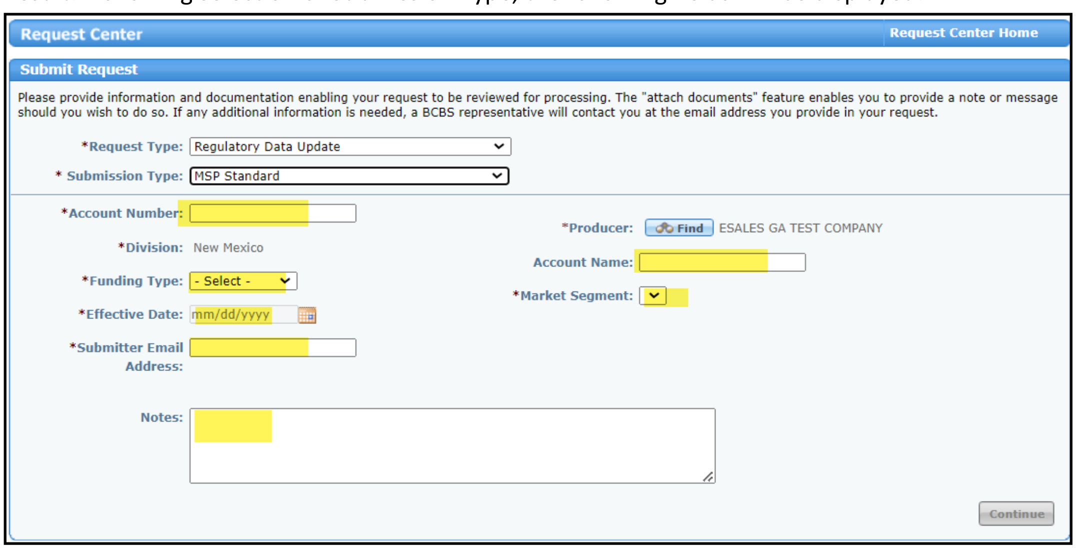
Regulatory Data Update

Select a Submission Type from the drop-down.

Note: HCSC Only Submission Types cannot be selected. You will receive an error message if you try to save.



Result: Following selection of Submission Type, the following fields will be displayed:



- **Account Number:** Enter the account number
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered
- **Funding Type:** Populates when account number and division are entered
- **Market Segment:** Populates when account number and division are entered

<table>
<tr>
<td></td>
<td>

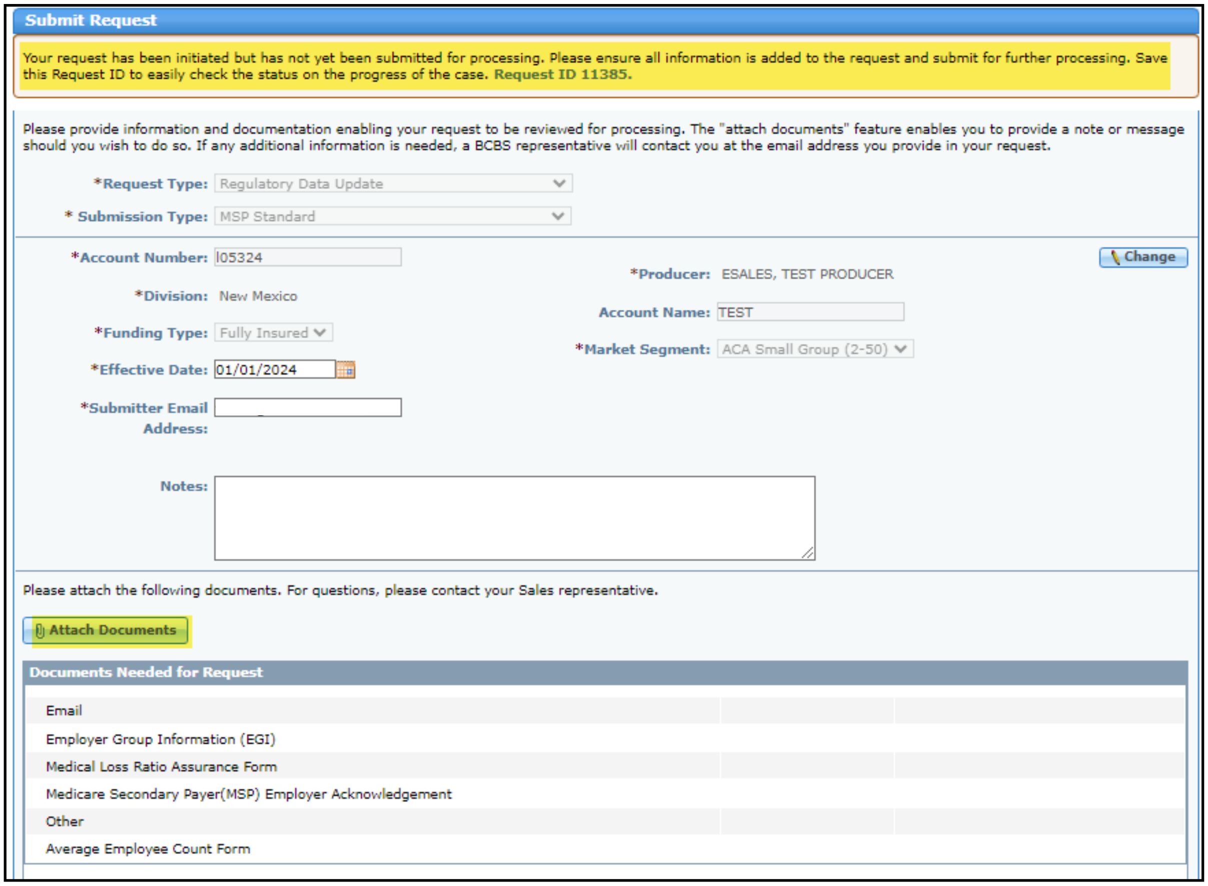
- **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

Once all required information is entered, click Continue. Continue

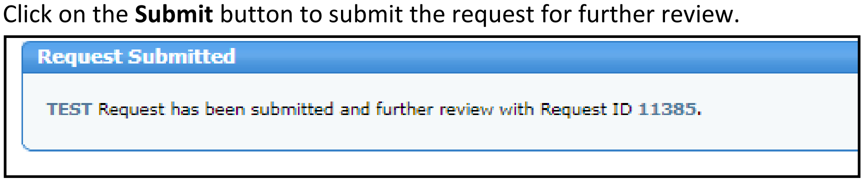
</td>
</tr>
<tr>
<td>Submit Request</td>
<td>

A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Regulatory Data Update.**

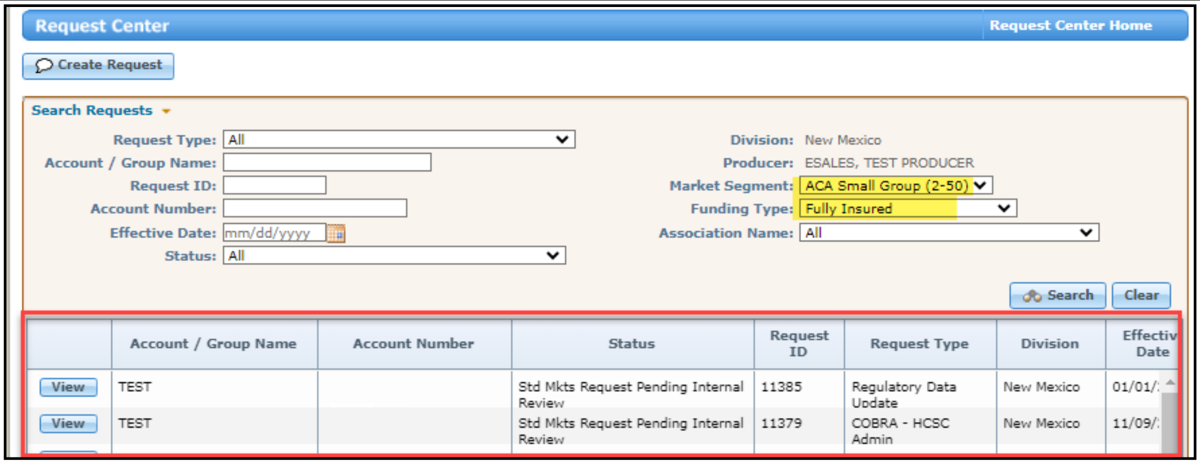
Follow the Attach Document step above to attach any documents and click on save and submit the request.



Click on the **Submit** button to submit the request for further review.



</td>
</tr>
<tr>
<td>Review Request</td>
<td>To review your request, search for it on the Request Center homepage using criteria available and click Search.</td>
</tr>
</table>

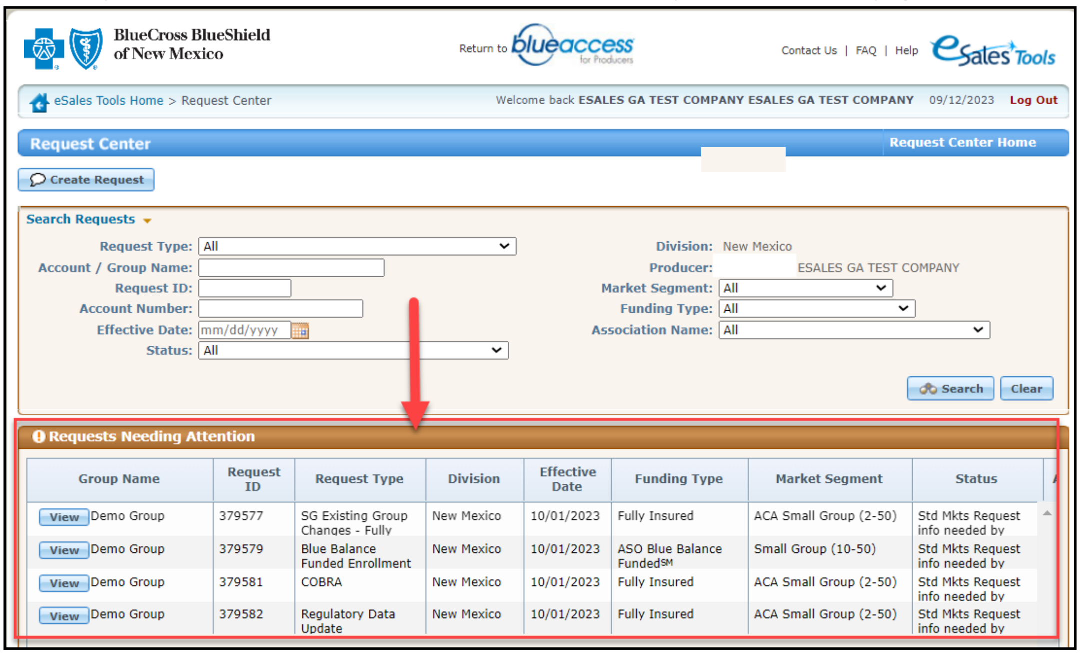


To view information, you can select the **View** button next to the account.

Request Needing Attention

Request Needing Attention

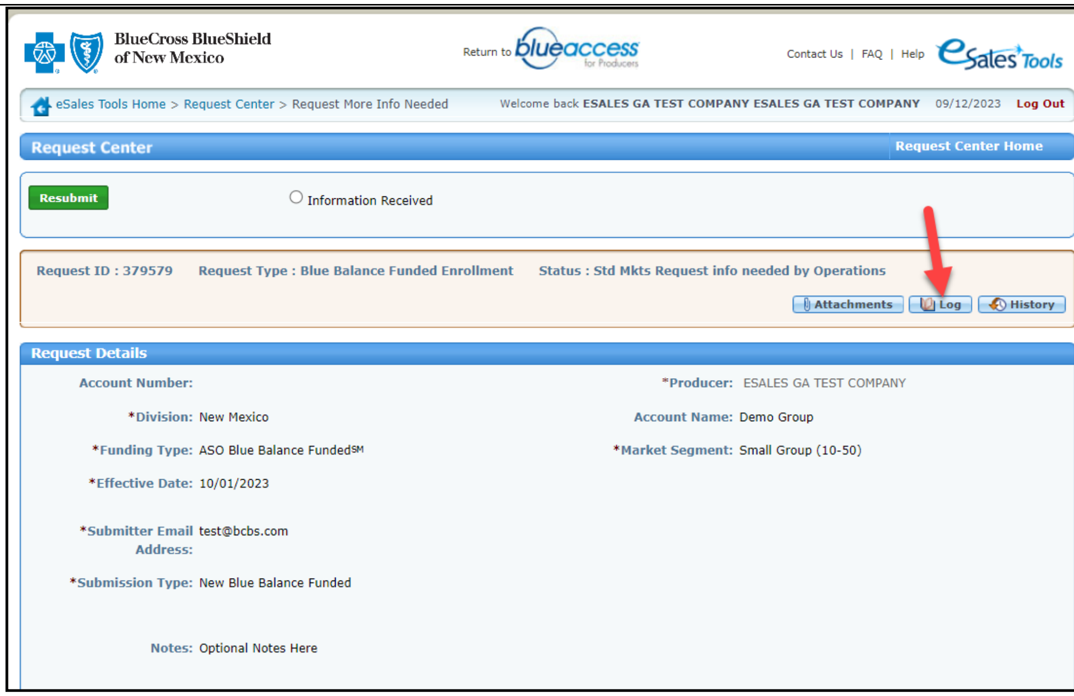
If there are any requests that may need users to complete additional steps (for example, due to Missing/ Incorrect/Incomplete documents), an email to the person in the Submitter email address field will be sent. Those requests can be found on the bottom section of the Request Center homepage.



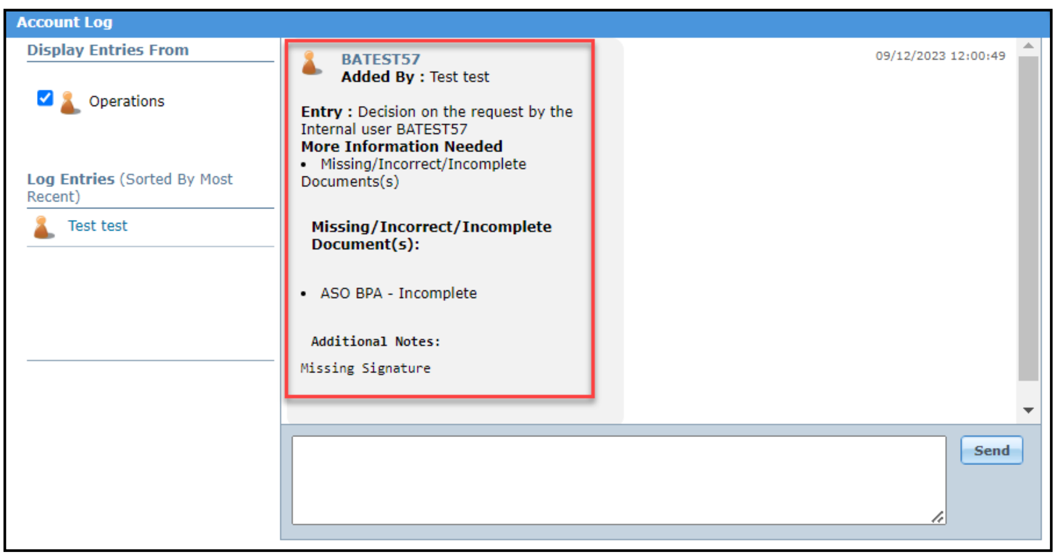
Request Needing Attention

Click on the **View** button next to the request needing updates.

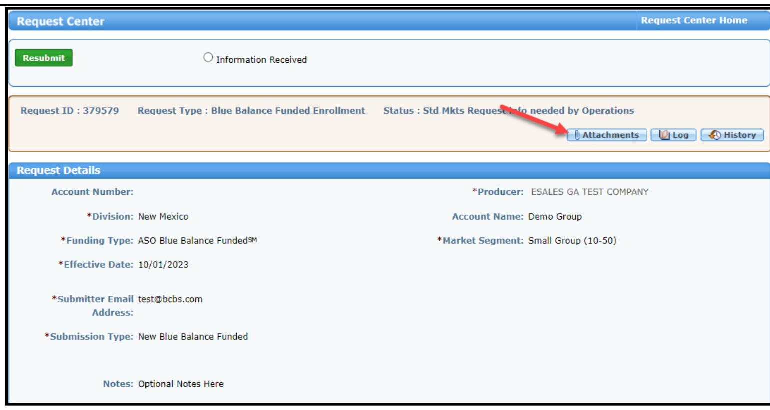
You will be able to view notes and comments of processors in the Log.



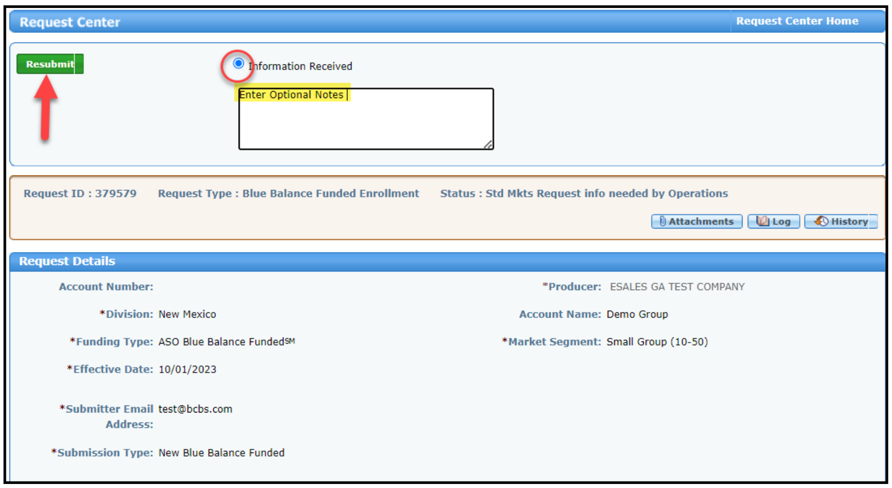
When **Log** button is selected, you can view the reason for the request info needed per the log entry.



The request will open and allow you to attach correct document(s) via the Attachments button and same instructions as above.



When all data is attached, click **Information Received** radio button, enter any Notes and click **Resubmit**.



Your request will go back to the processor with proper documentation.

Request Completion

Request Completion

After your Request has been worked, you will receive email confirmation that the Request is now complete. You can also verify on the Request Center homepage that Status is updated to Std Mkts Request Completed for your request.