

# Broker Portal

## Group Application Process/Plan Purchase

***\*\*If the group want to purchase the proposed policy, the next step is the application process\*\****

- 1. Step One:
  - 1.1. Open the group on the portal and click “Start Application” at the bottom of the page.  
The first step is to complete the required information relating to the group.
    - 1.1.1. Date Business Established, Tax Identification Number, and Type of Organization
    - 1.1.2. This is all the information needed for this page (see example below)

### Group Information

Group Name\*  
(Legal Name)  
Montana Health 21

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Date Business Established\*

05/1975

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Is this a Non-Profit?  Yes  No

Tax Identification N°\*

54-1234567

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Type of Organization

Corporation

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Notes

- 2. Step Two:
  - 2.1.1. Select the open enrollment start date: EX 05/20/2021
  - 2.1.2. You can also choose the Length of Enrollment Period: EX 1 days.
  - 2.1.3. The eligibility information is all automatically entered and can be left as is
    - 2.1.3.1. Enter number of Employees on Medicare.

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## Enrollment Information

When should coverage begin?

06/01/2021

Enrollment Start Date\*

05/20/2021

Length of Enrollment Period\*

1 days

## Eligibility Information

Active Eligible Employees\*

4

Number Taking\*

3

Number Waiving\*

1

Number on Medicare\*

Number on COBRA\*

0

How many **part-time hours** does the group have per year?\*

0

### 3. Step Three:

3.1. Complete the contact information for the group. Each group is required to have a primary contact ex: human resources, billing, owner etc.

3.2. More than one contact can be added. Choose from the drop-down menu what type of contact is being added.

### 4. Step Four:

4.1. Add the primary address for the group

4.1.1. If the mailing address is different than the primary, please add another address and change it to mailing, see below

## Secondary Address

Address Type

Mailing

1<sup>st</sup> Address Line\*

Po Box 123

2<sup>nd</sup> Address Line

City\*

Helena

State\*

Montana

ZIP Code\*














59604

### 5. Step Five:

5.1. If the employee census spreadsheet was not used doing the proposal, step five is where the additional information is added for each employee.

5.2. As shown below, the employees will have an incomplete status under employee profile. Click the edit button toward the right to add their information.

#### Employee Listing

#	M/F	Name	Date of Birth	Class	Employee Profile	Edit
1	F		12/05/1990	Fulltime	 Incomplete 	
2	F		10/02/1980	Fulltime	 Incomplete 	
3	F		03/10/1975	Fulltime	 Incomplete 	
4	F	Forgey, Sarah	06/21/1974	Fulltime	 1  Incomplete 	

5.3. Complete the necessary information for each employee

5.3.1. Employee Tab - First name, Last name, DOB, Social Security #, Gender, Hire Date

- 5.3.2. Address Tab – 1<sup>st</sup> address line, City, State, Zip and Phone #
- 5.3.3. Spouse & Dependents – If the employee has a spouse or dependent, this is where you will enter their information
- 5.3.4. When you are done, click the ‘Update’ button at the bottom and you will see that the employee status will change to ‘Complete’

6. Step Six:

6.1. If you have any documents you would like to add for the group, you may do so on the document tab.

6.2. There are no required documents you need to move forward

7. Step Seven:

7.1. This is the summary of the application. If any information is missing or not entered correctly, you will have an ‘Incomplete’ status for that specific tab.

7.2. You will also see your selected plans underneath that are available for each employee

7.3. After reviewing the summary, click the submit button at the bottom of the page.

Addresses	✔ Complete
Employees	✔ Complete

**Selected Plans**

Plan	Type	Estimated Total Monthly Premium	Employer Portion	Cost Per Employee
Bronze PLUS - Connected Care	Medical	\$1,711.10	Fulltime: \$518	<a href="#">Click for Premium Breakdown</a>

**Agent Service Area**

Title	Client	Address	ZIP Code
MT	Montana Health Co-Op	810 Hialeah, Helena, MT	59601

**Agent's Attestation**

As the writing agent/broker/producer, I acknowledge that I am responsible to personally interact with the Employer submitting this application in order to fully and accurately represent the terms and conditions of the plans and services of the offering or insuring entity, or one of its subsidiaries. These provisions are available to me and the Employer in the benefits summary document and other plan literature.

**Ready to make your initial submission for carrier review and approval?**  
 Please review this application carefully. Especially confirm the effective date, county, and selected plans. Once submitted, no further group changes can be made.

CANCEL
SAVE
DOWNLOAD AS PDF
SUBMIT

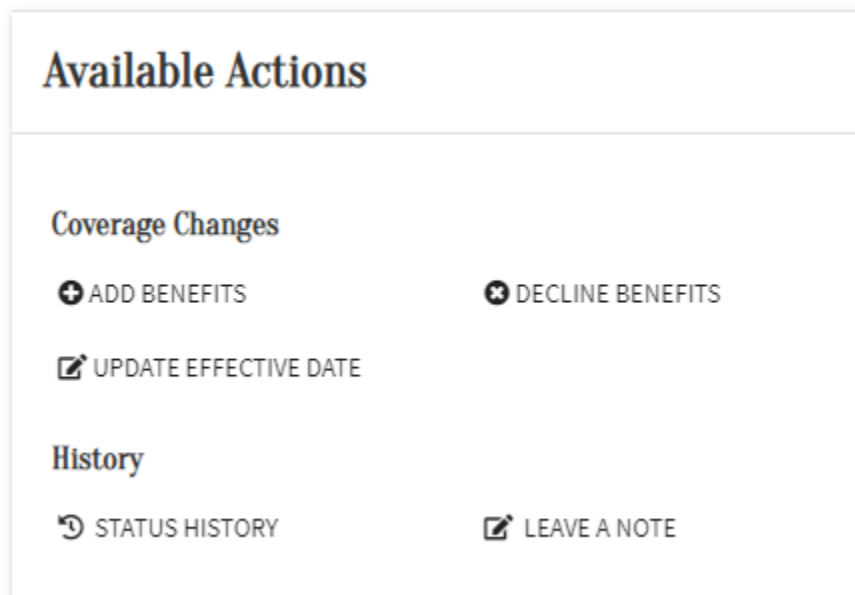
8. Step Eight:

\*It will go into Open Enrollment right away\*

## Employee Enrollment

### 1. Step One:

- 1.1. After open enrollment begins, each employee will need a benefit assigned to them. Open the group's account and click on the Employee Tab.
  - 1.1.1. Employees can self-enroll, or the agent can enroll the employees.
  - 1.1.2. If self-enrolling, be sure the option to send employee enrollments emails was marked "yes" during the application.
  - 1.1.3. If the agent is enrolling employees, click on the blue arrow next to the employee to open their account.
  - 1.1.4. On the right-hand side of the page, you will see 'Available Actions' and there will be an option to 'Add Benefits' or 'Decline Benefits'



- 1.2. You may also bulk enroll the employee benefits
  - 1.2.1. Select the drop-down arrow and choose 'Extract Active Members'
  - 1.2.2. This will open an excel sheet for you to add the benefits for each employee
  - 1.2.3. If you scroll over to the right of the sheet, Medical Plan QHP ID and Medical Plan Name is needed for each employee
    - 1.2.3.1. Medical Plan QHP Id and Medical Plan Name can be found under the Product Tab within the group.
  - 1.2.4. When you have this information go back into your spreadsheet and add the Plan Name and Plan ID for each employee.

Plan Election			
Date dd/yyyy	Premium	Medical Plan QHP Id	Medical Plan Name
	300.59	32225MT013000500	Bronze PLUS - Connected Car
		32225MT013000500	Bronze PLUS - Connected Car
		32225MT013000500	Bronze PLUS - Connected Car
		32225MT013000500	Bronze PLUS - Connected Car
		32225MT013000500	Bronze PLUS - Connected Car

- 1.3. Go back to the Employee Tab, and under the 'Bulk Actions' drop-down arrow there is an option to 'Bulk Enroll Employees'
  - 1.3.1. Select that option to upload the spreadsheet you just created
2. Step Two:
  - 2.1. After each employee has a benefit selected or have selected decline coverage, the group can be submitted. Submit for carrier review. MHC will approve.
    - 2.1.1. On the group dashboard, and click on the Submit Group Enrollment and Pay option
  - 2.2. This will take you to the Collect Payment page
    - 2.2.1. The group can either have a bill mailed to them or have a payment submitted on that page. After selecting the option, click Next and then Submit.
    - 2.2.2. Submit enrollment and pay

\*Your employee enrollment forms will be sent to membership team for processing and ID cards will be sent out within 10 business days.

3. Step Three:
  - 3.1. Grant the Primary Contact access to their employer portal. Open the group account on the portal, and click on the Contacts Tab.
    - 3.1.1. Next to the Contact, click on the 3 dots, and choose "Register Group Admin", an email will be sent to that email address with instructions to access employer portal.

## Annual Group Renewal

**\*\*When a group is due for renewal, the agent and group leader will receive a notice from MHC 60 days prior to renewal date\*\***

**\*\*You also can log into your portal and see what groups are due for renewal under the 'Needs Action' tab\*\***

1. Step One:
  - 1.1. If a group is due for renewal, you will be notified ahead of time and get a notification at the bottom of your portal dashboard
  - 1.2. From your home page if you scroll to the bottom, you will see how many of your groups are due for renewal under the 'Needs Action' section
    - 1.2.1. Click on 'Due for Renewal' to open all of your groups
  - 1.3. Then open a group you are ready to start the renewal for
    - 1.3.1. You should see a 'Start Group Renewal' option in the middle of the page

## Enrollment Due for Renewal

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Your coverage for **2020** is nearly over. You have until the end

You can now create proposals and apply for next year's cover

This group has 3 pending life events and 1 pending enrollment. **Open enrollment will NOT begin until all life events and enrollment are processed by the carrier and should be complete soon.**

**Select the Holding Open Enrollment Filter under the Employment**

Note: if you need to add employees, use the *Employees tab*. All employee contacts can be updated year round.

**START GROUP RENEWAL**

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2. Step Two:
  - 2.1. After you start your renewal, by clicking on "Start Group Renewal", the first page will be a review of the group. You can edit the address, contributions, or plan selections on this page. If nothing is changing, click Next to move to the next page.
  - 2.2. You can upload any documents pertaining to the group here. If there are no documents, click Next.

2.3. The final page is an overview of the group information. Enrollment period dates can be updated so the open enrollment dates of your choice. Benefits cannot be added until open enrollment starts.

<b>Enrollment Period</b>	
<b>Days</b>	2
<b>Start Date</b>	06/22/2021
<b>End Date</b>	06/23/2021
<b>Coverage Effective Date</b>	08/01/2021
<b>Coverage End Date</b>	07/31/2022

2.4. After reviewing the above dates, click save on the bottom of the page, and then at the bottom of the page it will tell you to submit the group renewal.

3. Step Three:

3.1. MHC will get notification of the submitted renewal and will approve it. The agent will receive an email from MHC once the group has been approved.

4. Step Four:

4.1. Once open enrollment begins, open the Employee tab and view an employee.

4.1.1. Each employee will have a "Start Renewal" and "Opt-Out Renewal"



**Renewal In-progress - Active**

Currently life event and term functionality are not available.

<h3>Policy</h3> <table><tr><td>Subscriber</td><td>KnuteA Kleveland</td></tr><tr><td>Location</td><td>MT 59604</td></tr><tr><td>Status</td><td>Active</td></tr><tr><td>Renewal Status</td><td>Renewal In-progress - Active</td></tr></table> <hr/> <table><tr><td>Account N<sup>o</sup></td><td>1000005879</td></tr><tr><td>Issuer Subscriber ID</td><td>292400431</td></tr><tr><td>Subscriber ID</td><td>G000005879</td></tr></table>	Subscriber	KnuteA Kleveland	Location	MT 59604	Status	Active	Renewal Status	Renewal In-progress - Active	Account N <sup>o</sup>	1000005879	Issuer Subscriber ID	292400431	Subscriber ID	G000005879	<h3>2019 Current Coverage</h3> <h4>LINK Gold Option 2</h4> <table><tr><td>LINK Gold Option 2</td><td></td></tr><tr><td>Effective Date</td><td>11/01/2019</td></tr><tr><td>Monthly Premium</td><td>\$180.75</td></tr><tr><td>Plan</td><td>38128ID0130008</td></tr><tr><td>Market</td><td>Group</td></tr></table> <h4>Who is Covered</h4> <table><tr><td>Primary</td><td>KnuteA Kleveland</td><td>01/01/1975</td></tr></table>	LINK Gold Option 2		Effective Date	11/01/2019	Monthly Premium	\$180.75	Plan	38128ID0130008	Market	Group	Primary	KnuteA Kleveland	01/01/1975	<h3>Available Actions</h3> <h4>Coverage Changes</h4> <table><tr><td>RENEW COVERAGE</td><td>OPT-OUT RENEWAL</td></tr></table> <h4>History</h4> <table><tr><td>STATUS HISTORY</td><td>LEAVE A NOTE</td></tr></table> <h4>Carrier Options</h4> <table><tr><td>DOWNLOAD 834</td><td>RE-SEND 834</td></tr><tr><td>SIMULATE 834</td><td>GENERATE 1095</td></tr></table>	RENEW COVERAGE	OPT-OUT RENEWAL	STATUS HISTORY	LEAVE A NOTE	DOWNLOAD 834	RE-SEND 834	SIMULATE 834	GENERATE 1095
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- 4.1.2. If the employee is wishing to renew, click start renewal and begin the application
- 4.1.3. If the employee is not wanting to renew, click on Opt-Out Renewal.
- 4.2. After all employees have renewed or opted out of renewal, go back to the group's dashboard and Submit Group Enrollment

After all employees are approved or denied, submit the group using the *Submit Group Enrollment* button. To ensure an effective date of **November 1, 2020** the group must be submitted by **October 31, 2020**.

**SUBMIT GROUP ENROLLMENT**