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**BLUE CROSS**

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**Group Administrator Website  
User Guide  
Version 2.0**

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## **Introduction**

The User Guide is intended to provide the user with an overview of the Group Administrator Website. It includes the majority of transactions that the user would require to administer their Blue Cross benefits online. Users can review the various transactions in detail within the content of this document. A Quick Reference Guide is also available at the end of this document.

## **Quick Reference Guide for Member Enrolment and Updates**

The Quick Reference Guide for Member Enrolment and Updates is included in the last appendices of this document. The intent of the guide is to provide users with a brief overview of the site and how to submit some of the more common transactions.

## **Quick Reference Guide for Member Inquiry**

The Quick Reference Guide for Inquiry is included in the last appendices of this document. The intent of the guide is to provide users with a brief overview of the site and where to view some of the more common transactions

## Signing into the Group Administrator Website

Go to the web address provided in the e-mail containing your login ID and password. Please note that this address is temporary until all clients have been converted and trained to use our new Membership Enrolment System. Once the conversion is complete, the site will be accessible from our home page, by selecting the Group Administrator link.

### Application Menu

Once the login ID and password have been entered, the Application Menu will be presented. The following options are available:

#### ES – Enrolment

This is the option administrators would choose to add, change or inquire on benefits for members.

#### \*COV – Group Coverage Information

If the administrator has been authorized and has requested to view the group contract online, this link would be selected to view the contract.

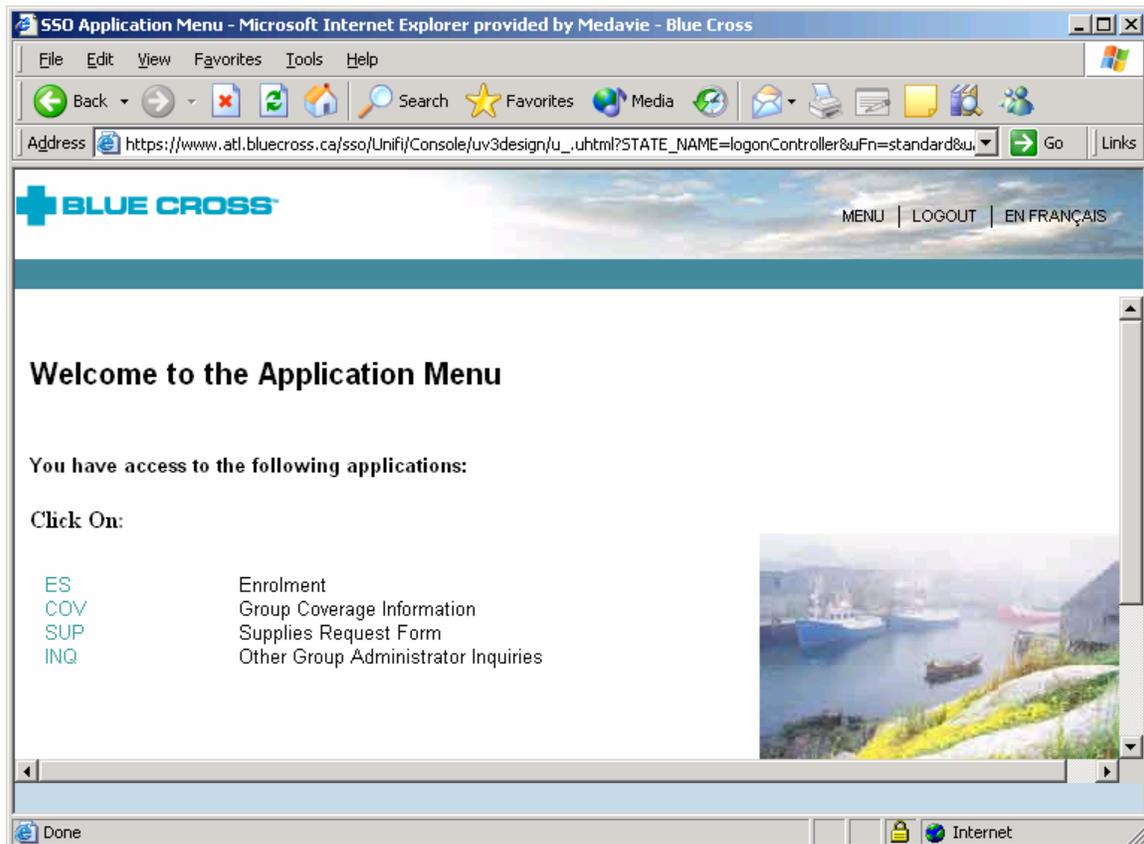
#### \*SUP – Supplies Request Form

This link is used to request various administration forms.

#### \*INQ – Other Group Administrator Inquiries

This link is used to e-mail requests/inquiries to various areas within Blue Cross.

*\*These options may not be available to all users.*



## Welcome Page

Once the user has selected ES from the Application Menu, the following screen will be presented.

**Policies** – The policies tab will display the policies and divisions to which the user has access.

**Members** – The Members tab will allow the user to access the Search and Add New Member functions. This tab would be selected each time the user wishes to view and/or update eligibility information.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The website header features the Blue Cross logo on the left and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT" on the right. Below the header is a main navigation bar with tabs for "Policies", "Members", and "Parties". A language selector for "FRANÇAIS" is located on the right side of the page. The main content area displays a welcome message: "Welcome TRAINING USER1 to Group Administrator Services". Below this, a section titled "Group Administrator Services gives you the opportunity to:" lists three bullet points: "View policy lists to locate your specific policy.", "Perform member-specific transactions, such as adding a new member or dependent or changing address or benefits.", and "Perform member searches to locate a specific member of a policy and/or view member information." To the right of the text is a photograph of a harbor with several boats. Below the text and image is a blue box with the heading "Click On :" and three links: "Policies" to access policy and member information, "Members" to access member information, and "Parties" to access general information for a person and/or institution. Below this box, a security notice states: "You have entered a secure area. If your connection is inactive for more than 30 minutes, your connection will be terminated, work in progress on your desktop will not be submitted, and you will be required to repeat your login to this site." Below the notice, it says: "For security reasons, you cannot bookmark any page beyond this point." At the bottom of the browser window, the taskbar shows the "Local Intra" icon.

Once the Members tab has been selected, a secondary navigation bar is presented. To begin any work the user must start with the Search tab.

The screenshot shows a secondary navigation bar with a teal background. It contains a main navigation bar with tabs for "Policies", "Members", and "Parties". Below this, a secondary navigation bar is displayed with the following tabs: "Search", "General", "Member Selection", "Coverages", and "Services".

# Enrolling Members for Benefits

## Member Search

Once the administrator has selected ES from the Application Menu, they must click on the Members tab and then select the Search tab from the secondary navigation bar. From here the Search screen will be presented.

## Member Add

For the purpose of adding benefits for a member select the radio button beside "Name". Complete the fields for Policy ID, Division, Last and First Name. Select the Add Member option from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty. The page header features the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the header is a navigation bar with tabs for Policies, Members (selected), and Parties. Underneath, a secondary navigation bar includes Search (selected), General, Member Selection, Coverages, and Services. The main content area is titled "Member Search" and contains the following form elements:

- Radio buttons for "Active" and "Active and Terminated" (selected).
- "Search by:" section with radio buttons for:
  - external identification number
  - alternate identification number
  - system identification number
  - name (selected)
- Form fields for:
  - Policy ID: 12345
  - Division: 000
  - Identification Number: (empty)
  - Last Name: Smith
  - First Name: John
  - Book of Business: (dropdown menu)
- Radio button for "Display member list" (unselected).
- Form fields for:
  - Policy ID: (empty)
  - Division: (empty)

At the bottom of the page, a blue navigation bar contains the buttons "Add Member", "Clear Search Fields", and "Query". The browser's status bar at the bottom shows "Local intranet".

## **Member Add *continued.***

If a member with the same name exists within the policy number entered, they will be presented. This feature is available because the member may require benefits to be reinstated instead of a new enrolment. The member's name may also appear with the wording "In Progress" below their name. Had the administrator already started to key a new enrolment and was not able to complete it, the partial enrolment will be saved, the terminology "In Progress" will be below the name. Simply click on the link and continue the enrolment.

If the names presented in the listing are different from that which the administrator is enrolling then the user would not click on any of the links, simply click the Resume Member option from the navigation bar on the bottom of the screen.

## **Warning/Error Messages**

The user may be presented with error messages or warning messages. Most messages will present in red text within the screen the user is working on. If there are messages that are not clear please contact the website administration team for direction. It is important to understand the message as follow up work may be required

## Member Add *continued..*

### Creating the Enrolment Workflow

Once the Add Member option has been selected from the blue navigation bar on the bottom of the screen, the user will be presented with the first screen of the enrolment workflow. Upon completion of each screen the user will select Continue from the navigation bar. If at any time the user needs to go back to a previous screen in the workflow, they can do so by selecting the appropriate tab.

Should the user go back to one of the previous tabs, the "Continue" option must be used on each subsequent screen since the required information could change depending on the change made by the user. If the enrolment is to be cancelled, please use the delete option to remove the application entirely. If the enrolment is cancelled and not deleted, it sits in an "In Progress" status to be accessed at a later time.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. A navigation bar contains tabs for Policies, Members, Products, Parties, and Services. Below this is a search bar and a secondary navigation bar with links for General, Member Selection, Coverages, Billing, and Services. The main content area is titled "Personal Data" and displays the following information:

Policy ID: 12345    Division 0009    COMPANY ABC    Owner: ABCC  
System ID: 500293428    Main Division    Atlantic Regional Group

**Member Add - Member Personal Data**

Enrollment:     Initial     Subsequent

External ID:    500293428

Last Name:   

First Name:   

Address :      
                    
                  

Postal Code:   

Telephone Number:   

Health Care Province:   

Language:   

Permanent Date Employed:   

At the bottom right of the form are buttons for "Continue", "Cancel", and "Delete". The browser's status bar at the bottom shows "Done" and "Local Int".

## Member Add - Personal Data

Once the Name, Policy ID and Division have been entered on the Member Search Screen, select the Add Member option from the blue navigation bar on the bottom of the screen. The name, policy and division will be carried forward to the Member Personal Data screen.

The section entitled Enrollment will normally be defaulted to Subsequent and the user will not be able to change the selection. If the group and division are new and are in the process of being created, the field will be flagged to initial until the first bill is created. The user should leave the Initial radio button selected.

Complete the Address and Telephone Number fields.

Select the Health Care Province in which claims will be adjudicated from the dropdown menu.

Complete the Language and Permanent Date Employed fields. The effective date of coverage will be calculated as per the conditions of the contract based on the date entered in this field.

*Note:* If the number printed on the identification card is to be assigned by the user, as per the conditions of the contract, a field entitled Alternate ID# will be presented as the first field on this screen. The field must contain nine characters. Please front fill with zeros if the number being assigned is not this length.

Click Continue from the navigation bar on the bottom of the screen to proceed.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites RSS Mail Print Print Preview Window Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Products Parties Services

Search General Member Selection Coverages Billing Services

**Personal Data**

Policy ID: 12345 Division 000 9 COMPANY ABC Owner: ABCC  
System ID: 500293428 Main Division Atlantic Regional Group

### Member Add - Member Personal Data

Enrollment:  Initial  Subsequent

External ID: 500293428

Last Name:

First Name:

Address :

Postal Code:

Telephone Number:

Health Care Province:

Language:

Permanent Date Employed:

Continue Cancel Delete

Done Local int

## Member Add - Package Choices

Package Choices are displayed as the second tab of the enrolment workflow. The user will select the type of packages that the employee has requested. Specifics of the packages will be presented further into the enrolment.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

Back Search Favorites

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Products Parties Services

Search General Member Selection Coverages Billing Services

Personal Data **Package Choices**

Policy ID: 12345 Division 000 COMPANY ABC Owner: ABCC  
System ID: 500293428 Main Division Atlantic Regional Group

### Member Add - Package Choices

| Health Coverage Options                     |           | Life Coverage Options                          |           |
|---|-----------|--|-----------|
| <input checked="" type="checkbox"/> Medical | 01Jan2007 | <input checked="" type="checkbox"/> Life       | 01Jan2007 |
| <input checked="" type="checkbox"/> Dental  | 01Jan2007 | <input checked="" type="checkbox"/> Disability | 01Jan2007 |

[Calculate Eff. Date](#)

Your Effective Date will be 01Jan2007

Date of Signature: 1 Oct 2006

Co-ordination of Benefits:  Yes  No

Claim Waiting Period:  Applied  Waived

Late Applicant:  Yes  No

Continue Cancel Delete

Done Local Intra

## Benefits

Benefits are presented on this screen in general terms; specific options are presented in the screens to follow. Place a check mark in the benefits required by clicking in the boxes to the left of the benefit. For the Life Coverage Options, all options except for weekly indemnity (Short Term Disability) and Long Term Disability are grouped as Life. Long Term Disability and Short Term Disability are grouped together as Disability. If the employee is applying for one life benefit or all available life benefits, these options still need to be selected so that the appropriate packages are displayed.

## **Member Add - Package Choices *continued...***

### **Calculating the Effective Date**

One of two options will be displayed in this instance, depending on the terms of the contract for the selected policy and division. A grey button entitled "Calculate Eff. Date" is the most common scenario and will appear below the box containing the package choices. The other option is a field entitled "Assign Eff. Date" where the user can enter the effective date of coverage.

### **Calculate Effective Date**

Click on the "Calculate Effective Date" button to display the effective date of coverage. If there are multiple probationary periods for the options that are grouped together, the earliest date will be displayed. When the ID is assigned, it will calculate the correct dates for each line of benefit. For example, if the employee is eligible for Travel the day they are hired but their Hospital, Extended Health and Drug benefits are not effective until three months following employment, the date displayed beside Health will be equivalent to the Travel benefits effective date. When the card is issued the correct dates will be on the back of the card in the cases where benefit descriptions are printed on the cards.

Below the "Calculate Effective Date" button is a field entitled **Override Effective Date**. Please do not use this option as it may result in the incorrect effective dates being applied. Please forward these requests by fax to be processed manually.

### **Assign Effective Date**

The effective date can be assigned if this field is presented. The user is to enter a date that is no more than 31 days in the past or they will be presented with an error. Anything that is more than 31 days in the past is to be faxed to the Customer Administration team at Blue Cross for processing.

### **Late Applicants**

If the benefits are going to be late then the wording *\*will be late\** appears to the right of the benefit. If all benefits are late, then the wording *\*will be late\** will appear below the package choices as well. This means that our medical underwriting department will notify the employee that a statement of health must be completed to determine if benefits will be approved or declined.

### **Date of Signature**

If Life benefits are assigned, the Date of Signature field will be presented and must be completed. Enter the date in which the employee has signed the application form.

### **Co-ordination of Benefits**

The user must indicate if Co-ordination of Benefits is to be assigned by selecting the appropriate radio button beside this option. This information will be requested later in the workflow if the user indicates "Yes".

### **Claim Waiting Period and Late Applicant Status**

The user cannot alter the claim waiting period, it is determined based on whether or not the member is deemed a late applicant. If they are late, the waiting period is applied and if they are not late the waiting period is waived.

Late Status is also determined based on the same criteria as the Claim Waiting Period

**\*\*Note:** These functions are currently not displaying properly but will not affect the application. If the user encounters difficulties with this process please contact the webadmin support team.

Click Continue to proceed to the next screen.

## Member Add - Benefit Selection

Benefit Selection are displayed as the third tab on the enrolment workflow. All available packages pertinent to the selected policy and division as well as the effective date of coverage will be presented on this screen.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Personal Data **Package Choices** Benefit Selection

Policy ID: 12345 Division 000 COMPANY ABC Owner: ABCC  
 System ID: 500293428 Main Division Atlantic Regional Group

### Member Add - Benefit Selection

Select a Health Coverage Option

If packages have rating status's marked with a \* they must have the same value

|  |   |   |
|--|---|---|
| <input checked="" type="radio"/> Medical | AA - MEDICAL PACKAGE 1<br>4 Hospital<br>F Travel<br>1 Extended Health Benefits<br>5 Drugs | Mandatory<br>Health Care Province: NB Rating Status: Family<br>Waive: <input type="checkbox"/> Waive Reason: <input type="text"/> |
| <input type="radio"/> Dental             | AA - DENTAL PACKAGE 1<br>9 Dental   | Mandatory<br>Health Care Province: NB Rating Status: Family<br>Waive: <input type="checkbox"/> Waive Reason: <input type="text"/> |

Select a Life Coverage Option

|                                       |  |   |
|---------------------------------------|--|---|
| <input checked="" type="radio"/> Life | A - ALL EMPLOYEES LIFE<br>3 Basic Life<br>1 Accidental Death & Dismemberment       | Mandatory<br>Waive: <input type="checkbox"/> Waive Reason: <input type="text"/> |
| <input checked="" type="checkbox"/>   | A - ALL EMPLOYEES CRITICAL CONDITIONS<br>C3 Critical Conditions                    | Optional<br>Amount: \$ 50000 Rating Status: Family                              |
| <input type="radio"/> Disability      | A - ALL EMPLOYEES DISABILITY<br>3 Short Term Disability<br>30 Long Term Disability | Mandatory<br>Waive: <input type="checkbox"/> Waive Reason: <input type="text"/> |

Continue Cancel Delete

Local intranet

## **Member Add - Benefit Selection *continued...***

### **Package Options**

On the Benefit Selection tab the user will be presented with the package options that correlate to the package combination selected on the Package Choices screen. They must select the radio button to the left of the appropriate package. If the package options are not clear the names of the packages can be modified to provide clarity to the user.

### **Rating Status**

The Rating Status, ex. Single, Couple or Family must be selected from the dropdown list. If two different statuses are selected, two different IDs will be created. For example, if Family is selected for health benefits and Single for dental benefits then two IDs will be created: Family Health and Single Dental. If there is an asterisk (\*) beside the status selection then the statuses must be the same for both.

### **Waiving the Benefit**

If the benefit can be waived there will be a Waive Option and Waive Reason presented. To waive the benefit, check the Waive box and select a reason from the dropdown list.

### **Life Benefits**

Life Benefits are grouped together by class. Select the appropriate class and click the radio button to the left of the class. Optional benefits that are available in that class are displayed and must be selected by checking the appropriate box to the left of the benefit.

Click Continue to proceed to the next screen.

## Member Add - Beneficiaries

The Beneficiaries screen will be presented if the Life options selected require that a beneficiary be assigned. Complete the name(s) and indicate the percentage to be assigned.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Personal Data Package Choices Benefit Selection **Beneficiaries**

Policy ID: 12345 Division 000 COMPANY ABC Owner: ABCC  
 System ID: 500293428 Main Division Atlantic Regional Group

Member Add - Beneficiaries

| Last Name | First Name | Relationship | Percentage | Irrevocable              | Update Id |
|-----------|------------|--------------|------------|--------------------------|-----------|
| Smith     | Jane       | Spouse       | 100        | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |

Continue Cancel Delete

Local Intra

### Multiple Beneficiaries

If there are multiple beneficiaries, the percentages must add up to 100%. The percentages must be assigned as whole values. For example, if the employee has three beneficiaries listed and wants the benefit to be equally paid, the user would enter 33%, 33% and 34%.

### Irrevocable Beneficiaries

This option would only be selected in the case where the beneficiary may not be terminated by the insured without the beneficiary's consent. Please refer to the contract for further information.

Click Continue to proceed to the next screen.

## Member Add – Co-ordination of Benefits (COB)

This screen is populated if Co-ordination of Benefits is selected on the Package Choices screen. All fields must be completed. If all information is not available, the user can enter the wording "unknown". Completing as much information as possible in this screen is to the benefit of the group and the subscriber.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Personal Data **Package Choices** Benefit Selection Beneficiaries COB

Policy ID: 12345 Division: 000 COMPANY: ABC Owner: ABCC  
System ID: 500293428 Main Division Atlantic Regional Group

### Member Add - Co-ordination of Benefits

Coverage Eff Date: 1 Mar 2002

Other Insurer

Name of Insurer  
Carrier Name

Policy Number: 123-990 Identification #: 123123

Cardholder of 'Other' Coverage: Jane Smith Date of Birth: 1 Jan 1971

Type of Coverage

All: Family Vision  
Hospital: Drugs  
Extended Health Benefits: Dental

Insureds

All  
 Spouse  
 List Specific Insureds

Continue Cancel Delete

## Member Add - Member Details

The Member Details screen allows the user to enter details on occupation and salary. Where applicable, the Health Spending Account information is also added using this screen.

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Personal Data Package Choices Benefit Selection Beneficiaries COB **Member Details**

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

### Member Add - Member Details

Alternate ID #1:   
Alternate ID #2:

Employment Details

Occupation Category:

Occupation:

SIN:

Salary Information

Salary  Frequency  Hours per week

Health Spending Account

Contribution Year:   
Yearly Deposit:   
Effective Date:

Continue Cancel Delete

Done Local Intra

### Alternate ID#

The Alternate ID fields are not mandatory but are presented as some clients require this information to be completed. Typically if the Alternate ID is a mandatory field for the client then it would be presented on the initial screen of the enrolment and the number entered would be printed on the subscriber's identification card.

### Occupation

These fields will be presented when disability life benefits are selected. There are thirteen choices with examples listed for each category. To view the category the user should select All from the drop down menu. The Occupation field allows the user to enter a more detailed description as it is a text field. The occupation information affects the premiums and will affect the group rates at time of renewal.

## **Member Add - Member Details *continued...***

### **Salary**

These fields will be presented when life benefits are selected and are based on salary. The fields are mandatory if presented and must be completed by the user.

### **Health Spending Account (HSA)**

If applicable, the HSA information can be entered on this screen. Check the box to the left of the HSA fields and then enter the contribution year, initial HSA deposit amount, and the effective date. The HSA can be added or modified at a later date as well.

Click Continue to proceed to the next screen.

## Member Add - Insured Details

The names and dates of birth of the member, their spouse and dependents, if applicable, are entered on this screen.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Personal Data Package Choices Benefit Selection Beneficiaries COB Member Details Insured Details

Policy ID: 12345 Division: 000 COMPANY: ABC Owner: ABCC  
System ID: 500293428 Main Division Atlantic Regional Group

Member Add - Insured Details

First Name Relationship Date of Birth  
JOHN Member 1 Jan 1970

Last Name Gender Privacy Consent  
SMITH Male Yes

More Insureds

Continue Cancel Delete

Done Local Intra

The screen initially appears as per the figure above. If additional insured are to be added the user must click the More Insureds button. The screen on the following page will appear.

### Privacy Consent

The Privacy Consent field should be flagged to yes. If no is selected for the member or any insured on the plan, then the employee will not be able to use other web related services offered by Blue Cross. This would include the cardholder website and situations where the employee is able to have claims paid directly by their service provider.

*Note:* If the member or any other insured on the plan does not accept the privacy consent clause as outlined on the back of the application form, please contact the call centre since specific information is required by Blue Cross to ensure claims are adjudicated properly.

## Member Add - Insured Details *continued....*

Once the More Insureds button has been selected, the following fields will be populated.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

BLUE CROSS WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Personal Data Package Choices **Benefit Selection** Beneficiaries COB **Member Details** **Insured Details**

Policy ID: 12345 Division 000 COMPANY ABC Owner: ABCC  
System ID: 500293428 Main Division Atlantic Regional Group

|            |                  |                 |                 |
|------------|------------------|-----------------|-----------------|
| First Name | Relationship     | Date of Birth   |                 |
| JOHN       | Member           | 1 Jan 1970      |                 |
| Last Name  | Gender           | Privacy Consent |                 |
| SMITH      | Male             | Yes             |                 |
| First Name | Relationship     | Date of Birth   |                 |
| Jane       | Spouse           | 1 Jan 1971      |                 |
| Last Name  | Gender           | Privacy Consent |                 |
| Smith      | Female           | Yes             |                 |
|            | Marital Status   | Date            |                 |
|            |                  | Day Month       |                 |
| First Name | Relationship     | Date of Birth   |                 |
| Thomas     | Child            | 10 Jan 2002     |                 |
| Last Name  | Dependent Status | Gender          | Privacy Consent |
| Smith      | Regular          | Male            | Yes             |

Continue Cancel Delete

Done Local Intra

### Additional Insureds

The information for the member is to be entered first. If additional insureds are to be covered then click on the More Insureds button and enter the appropriate information.

### Dependent Children

When children are entered, the status of the child is either regular, college/university, or disabled.

The dependent status is determined by the rules of the contract. If for example, a dependent is covered under the parent's plan until age 21 then they are considered a REGULAR dependent until that time. If they are between the ages of 21 and 25, the group allows the dependent to be covered under the condition that they are a full-time student at college/ university; the status would be COLLEGE/UNIVERSITY. If the status and age do not correspond to the terms of the contract, the administrator will be presented with an error.

Disabled status must be approved by the medical underwriting team. Please do not select this option, send the appropriate paperwork to Blue Cross for assessment. If the status is approved, the medical underwriter will change the status to disabled.

## Member Add - Insured Details *continued....*

If the dependent is within 60 days of becoming eligible as a student, the user will be presented with a Pre- Register Student option. By checking this option, the dependent will be changed to student status when they become eligible without the user needing to make the changes a second time.

Click Continue to proceed to the next screen.

The screenshot shows a web browser window titled "Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the header is a navigation menu with tabs for Policies, Members, and Parties. The Members tab is active, and a sub-menu shows options: Search, General, Member Selection, Coverages, and Services. The "Insured Details" tab is selected, and a sub-menu below it lists: Personal Data, Package Choices, Benefit Selection, Beneficiaries, COB, Member Details, and Insured Details. The main content area displays the following information:

Policy ID: 12345    Division 000    COMPANY ABC    Owner: ABCC  
System ID: 500293428    Main Division    Atlantic Regional Group

Fields for dependent information:

- First Name:
- Relationship:
- Date of Birth:
- Last Name:
- Dependent Status:
- Gender:
- Privacy Consent:

Pre-Register Student **Select if eligible**

At the bottom right of the form are buttons for **Continue**, **Cancel**, and **Delete**. The browser's status bar at the bottom shows "Done" and "Local intranet".

## Member Add - Confirmation

Once the information is submitted, the last screen presented is the confirmation screen. At this point if the information needs to be modified the user can go back to any of the tabs and modify the information. The user can click on the Show Details button to view a summary of the information that has been entered. If the information is complete, click on Submit from the navigation bar to save the application. If the user does not submit the information then the application will remain in an "In Progress" state until the user goes back into the ID and submits the request.

The screenshot shows a web browser window titled "Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header features the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the header is a navigation bar with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. A secondary navigation bar contains buttons for Personal Data, Package Choices, Benefit Selection, Beneficiaries, COB, Member Details, Insured Details, and Confirm. The main content area displays enrollment details: Policy ID: 12345, Division 000, COMPANY ABC, Owner: ABCC, System ID: 500293428, Main Division, and Atlantic Regional Group. Below this, the heading "Member Add - Confirm" is followed by a message: "The collection of the enrollment data for this member has been done. Please select 'submit' to approve the details." A "Summary" link and a "Show Details" button are present. At the bottom right, there are "Submit" and "Delete" buttons. The browser's status bar at the very bottom shows "Local intranet".

# Member Information and Changes

## Member Search

Once the administrator has selected ES from the Application Menu, they must click on the Members tab and then select the Search tab from the secondary navigation bar. From here the Search screen will be presented.

To make any changes to an existing member's coverage or personal information, the user must first open the member's file by using the Search function. The user can search by identification number or name. Once the search criteria are entered, the user should click on Query from the blue navigation bar at the bottom of the screen. They will be presented with a listing of all members matching the search information entered. The user must then select the blue link to open the employee's file.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty. The page header features the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the header is a navigation bar with tabs for Policies, Members (selected), and Parties. Under the Members tab, there is a secondary navigation bar with links for Search, General, Member Selection, Coverages, and Services. The main content area is titled "Member Search" and contains the following form elements:

- Radio buttons for "Active" and "Active and Terminated" (selected).
- "Search by:" section with radio buttons for:
  - external identification number
  - alternate identification number
  - system identification number
  - name (selected)
- Input fields for:
  - Policy ID: 12345
  - Division: 000
  - Identification Number: (empty)
  - Last Name: Smith
  - First Name: John
  - Book of Business: (dropdown menu)
- Radio button for "Display member list" (unselected).
- Input fields for:
  - Policy ID: (empty)
  - Division: (empty)

At the bottom of the form, there are three buttons: "Add Member", "Clear Search Fields", and "Query". The browser's status bar at the bottom shows "Local intranet".

## **Member Search *continued...***

### **Name Search**

Name searches can be done using the wildcard “%” if the complete spelling is not known or if there could possibly be initials used. A minimum of three characters must be entered in the last name field. The more information that is entered, the more quickly the results will come back.

### **External ID Search**

The external ID is the number that is printed on the employee’s identification card. The majority of searches by ID number would be successful if this option were chosen.

### **Alternate ID Search**

The alternate ID number represents a number that is assigned to the employee by the group plan administrator when Blue Cross benefits are assigned. This number is referred to as the “Alternate ID #” when assigning benefits using this website. It may be a payroll number or an employee number unique to the organization assigning the benefits. This number is typically printed on the card as well and can be searched for using either the External ID or the Alternate ID options.

### **System ID Search**

The system ID number is a number assigned by Blue Cross. It would appear on the identification card if an alternate ID number was not assigned by the organization providing benefits. This number can be searched for using either the External ID or the System ID number.

### **Policy / Member Listing**

A listing of members in the policy can also be retrieved if the user selects the Display Member list option and enters the Policy ID and Division. This will return up to a maximum of 250 results.

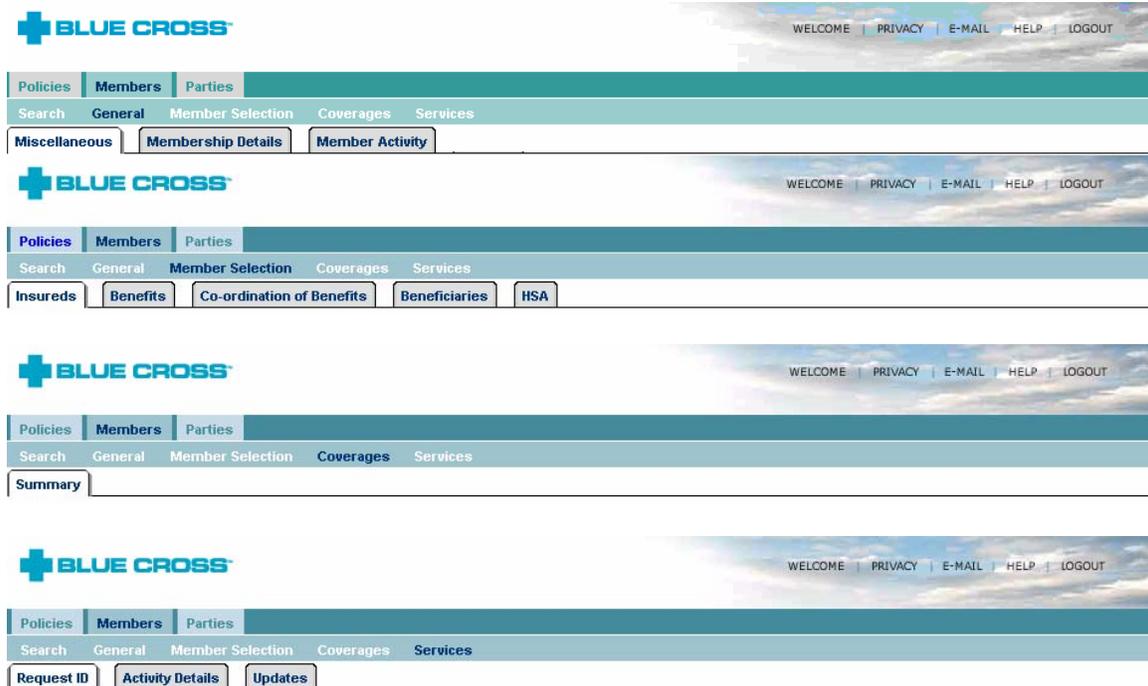
### **Warning/Error Messages**

The user may be presented with error messages or warning messages. Most messages will present in red text within the screen the user is working on. If there are messages that are not clear please contact the website administration team for direction. It is important to understand the message as follow up work may be required

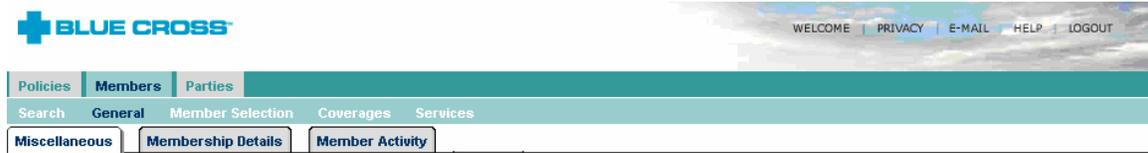
## Overview of Available Information

Once the user has selected the employee's file a series of tabs will be presented below the secondary navigation bar. These tabs will differ depending on the tab that is selected from the secondary navigation bar. Within each of these tabs is specific information on the employee and their benefits. If the user has *updating* access they will be presented with different options on the bottom bar within each of these screens to submit changes. If the user has *inquiry only* access they will only be able to query the information.

The figures below illustrate the information on the various tabs.



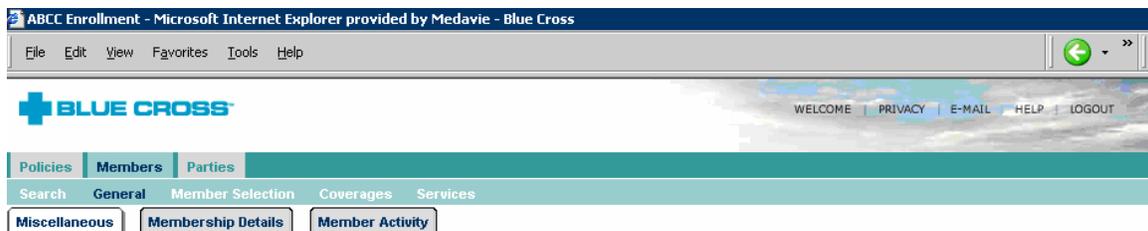
## General - Miscellaneous



Within the General – Miscellaneous tab the user will be able to

- Change Member Information
- Terminate/Reinstate Coverage

*Note: Users with inquiry only access will only be able to view the employee information on this tab.*



Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group  
 Ext. ID:  JOHN SMITH 500293428

### Miscellaneous

Name: JOHN SMITH  
 Address: 123 MAIN STREET  
 ANYWHERE TOWN NB  
 Postal Code:  
 Telephone Number: 506-555-5555  
 Effective Date: 01Oct2006 Termination Date:  
 Paid to Date: Termination Reason:  
 Policy Series: Retention Group  
 Language: English



## General – Miscellaneous *continued...*

### Change Member Information

To change a member's personal information, select General from the navigation bar on the top of the screen and then the Miscellaneous tab. Click update in the navigation bar on the bottom of the screen. The fields on the screen become editable and can be modified. Click the Save button on the navigation bar at the bottom of the screen to submit the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Below this is a sub-navigation bar with Search, General, Member Selection, Coverages, and Services. The "Miscellaneous" tab is selected, and within it, "Membership Details" and "Member Activity" are also visible. The member information displayed is: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. Below this is the "Update Miscellaneous" form with the following fields: Name: JOHN SMITH; Address: 123 MAIN STREET, ANYWHERE TOWN NB; Postal Code: (empty); Telephone Number: 506 555 5555; Effective Date: 01Oct2006; Paid to Date: (empty); Policy Series: Retention Group; Language: English (dropdown menu). At the bottom of the page, there are "Save" and "Cancel" buttons. The browser's status bar shows "Done" and "Local intranet".

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

BLUE CROSS

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Miscellaneous Membership Details Member Activity

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

### Update Miscellaneous

Name: JOHN SMITH

Address: 123 MAIN STREET  
ANYWHERE TOWN NB

Postal Code:

Telephone Number: 506 555 5555

Effective Date: 01Oct2006

Paid to Date:

Policy Series: Retention Group

Language: English

Save Cancel

Done Local intranet

## General – Miscellaneous *continued...*

### Termination of Coverage

To terminate the member's coverage, select General from the blue navigation bar on the top of the screen and then the Miscellaneous tab. From here, select Terminate from the navigation bar on the bottom of the screen. The following screen will be presented. Enter the effective date of the termination and the reason for the termination. Click Save on the navigation bar at the bottom of the screen.

If the change is being entered for the 1<sup>st</sup> of the month, the premiums will be billed for the full month. If the 1<sup>st</sup> of the month is entered, a warning message will be presented to remind the user of the implications of this change.

*Note:* The employee is covered until midnight of the termination date entered so, if they are to be covered for the full month of November, the user can key Nov 30 as the termination date.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar contains the URL "javascript:top.uSubmit('MemberGeneralMiscInq','memberGeneralMiscInquiry');". The page header includes the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Below this is a sub-navigation bar with Search, General, Member Selection, Coverages, and Services. The "Miscellaneous" tab is selected, and the "Member Activity" sub-tab is active. The form displays member information: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. The "Update Miscellaneous" section contains the following fields: Name: JOHN SMITH, Address: 123 MAIN STREET, ANYWHERE TOWN NB, Postal Code: (empty), Telephone Number: 506-555-5555, Effective Date: 01Oct2006, Termination Date: (Day, Month, Year dropdowns), Paid to Date: (empty), Termination Reason: (dropdown menu), Policy Series: Retention Group, Language: English. At the bottom right of the form are "Save" and "Cancel" buttons.

## General – Miscellaneous *continued...*

### Reinstatement of Benefits

*\*Please refer to the contract to ensure that the rules for reinstatements are followed. For example if the Health and Dental benefits were termed more than one year in the past a new application may be required.*

To reinstate the member's coverage, select General from the blue navigation bar on the top of the screen and then the Miscellaneous tab. From here, select Reinstatement from the navigation bar on the bottom of the screen. Selecting the reinstatement option will begin a workflow to enable the user to review the previous coverage and information and make appropriate changes.

Reinstatement/Transfer is the first screen in the workflow. Enter the effective date of the reinstatement and click on the Query button. The ID can also be transferred to a new policy and or division by entering the information in the appropriate fields. If the user is reinstating and transferring in the same step, please follow the workflow outlined in the General – Member Activity: Transfer section of this document. To continue with the reinstatement, click Query to display additional information.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar shows a search icon and a partial URL. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the header is a navigation bar with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The main content area is titled "Reinstatement / Transfers" and contains the following information:

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Member Reinstatement**

Effective Date:

Policy:

Division:

At the bottom of the page, there are buttons for Continue, Cancel, and Delete, and a status bar showing "Local intranet".

## General – Miscellaneous *continued...*

### Reinstatement of Benefits *continued...*

Once the grey Query button has been selected from the previous screen, the user will be presented with additional information. The province in which claims are to be adjudicated can be changed, if necessary, from here.

Click Continue on the navigation bar at the bottom of the screen to proceed to the next phase of the workflow.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the Blue Cross logo on the left and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT" on the right. Below the header is a navigation bar with tabs for "Policies", "Members", and "Parties". Under the "Members" tab, there are sub-tabs for "Search", "General", "Member Selection", "Coverages", and "Services". The "Reinstatement / Transfers" section is active, displaying the following information:

Policy ID: 12345    Division: 000 9    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group  
Ext. ID: 500293428    JOHN SMITH    500293428

**Member Reinstatement**

Effective Date: 1 Dec 2006  
Policy: 12345  
Division: 000

Company Name: COMPANY ABC  
Reason for Division: Main Division  
External ID: 500293428  
Health Care Province: NB

At the bottom of the page, there is a navigation bar with buttons for "Continue", "Cancel", and "Delete". The browser's status bar at the very bottom shows "Done" and "Local Intra".

## General – Miscellaneous *continued...*

### Reinstatement of Benefits *continued...*

Packages is the second screen presented in the workflow. The benefits that the member had at the time of termination will be presented. The user must re-select the packages that the member had or the packages can be changed at this point. The rating status must also be reselected or changed on this screen. Click Continue once the selections have been made.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Reinstate / Transfers Packages

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

#### Member Reinstate - Package Choices

Current Employee Classes / Packages

|            |    |   |        |                     |
|------------|----|---|--------|---------------------|
| Medical    | AB | MEDICAL PACKAGE 2<br>4 Hospital<br>F Travel<br>45 Extended Health Benefits<br>R Drugs | Single | Eff Date: 13Jul2000 |
| Dental     | AB | DENTAL PACKAGE 2<br>QX Dental   | Single | Eff Date: 13Jul2000 |
| Life       | A  | ALL EMPLOYEES LIFE 1<br>3 Basic Life  |        | Eff Date: 13Jul2000 |
| Disability | A  | ALL EMPLOYEES DISABILITY 1<br>3 Short Term Disability                                 |        | Eff Date: 13Jul2000 |

Available Employee Classes / Packages **Pick all applicable coverages. If not, they will be cancelled.**

Policy: 12345 Division: 000

Select a Health Coverage Option

If packages have rating status's marked with a \* they must have the same value

|                               |   |           |  |
|-------------------------------|---|-----------|--|
| <input type="radio"/> Medical | AA - MEDICAL PACKAGE 1<br>45 Extended Health Benefits<br>10 Drugs<br>F Travel<br>4 Hospital | Mandatory | Health Care Province: NB Rating Status: [dropdown]<br>Waive: <input type="checkbox"/> Waive Reason: [dropdown] |
| <input type="radio"/> Dental  | AA - DENTAL PACKAGE 1<br>6G Dental  | Mandatory | Health Care Province: NB Rating Status: [dropdown]<br>Waive: <input type="checkbox"/> Waive Reason: [dropdown] |

Select a Life Coverage Option

|                            |  |           |  |
|----------------------------|--|-----------|--|
| <input type="radio"/> Life | A - ALL EMPLOYEES LIFE 1<br>3 Basic Life | Mandatory | Waive: <input type="checkbox"/> Waive Reason: [dropdown] |
|----------------------------|--|-----------|--|

Continue Cancel Delete

Local intr...

## General – Miscellaneous *continued...*

### Reinstatement of Benefits *continued...*

Insured Details is the third screen that will be presented. The dependents, if any, who were on the plan at the time of termination, will be listed and can be modified on this screen. If the rating status is single then the user can click Continue to proceed. If the rating status is to be couple or family, then the user is to click the grey More Insureds button to reconfirm or add new information.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the header is a navigation menu with tabs for Policies, Members, Parties, and Services. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The main content area has three sub-tabs: Reinstatement / Transfers, Packages, and Insured Details. The Insured Details tab is active, displaying the following information:

Policy ID: 12345    Division: 000 9    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group

Ext. ID: 500293428    JOHN SMITH    500293428

**Member Reinstatement - Insured Details**

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JOHN       | Member       | 01Jan1970     |

[Last Name](#)    [Gender](#)    [Privacy Consent](#)

SMITH    Male    Yes

[More Insureds](#)

At the bottom of the page, there are buttons for Continue, Cancel, and Delete. The browser's status bar at the bottom shows "Local intranet".

## General – Miscellaneous *continued...*

### Reinstatement of Benefits *continued...*

If the user has clicked the grey More Insureds button from the previous screen, additional fields are presented in which the user can add additional dependents. The dependent information that was on file at the time of termination will be pre-populated on this screen.

Only additional information can be added from here. If the user needs to change or delete the information on file, this will be done in a second step once the reinstatement has been saved. See the section on Member Selection – Insureds: Modifying Insured Details for details on this additional step.

Click Continue to save the changes.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties Services

Search General Member Selection Coverages Services

Reinstate / Transfers Packages Insured Details

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

#### Member Reinstate - Insured Details

|            |                  |               |                 |  |
|------------|------------------|---------------|-----------------|--|
| First Name | Relationship     | Date of Birth |                 |  |
| JOHN       | Member           | 01Jan1970     |                 |  |
| Last Name  |                  | Gender        | Privacy Consent |  |
| SMITH      |                  | Male          | Yes             |  |
| First Name | Relationship     | Date of Birth |                 |  |
| Jane       | Spouse           | 1 Jan 1971    |                 |  |
| Last Name  |                  | Gender        | Privacy Consent |  |
| Smith      |                  | Female        | Yes             |  |
|            | Marital Status   | Date          |                 |  |
|            |                  | Day Month     |                 |  |
| First Name | Relationship     | Date of Birth |                 |  |
|            | Child            | Day Month     |                 |  |
| Last Name  | Dependent Status | Gender        | Privacy Consent |  |

Continue Cancel Delete

Done Local Intra

## General – Miscellaneous *continued...*

### Reinstatement of Benefits *continued...*

Once the user clicks Continue on the previous screen, the following confirmation screen will be presented. The user must click Submit in order to save the changes. If at any time during the workflow the user wants to cancel the reinstatement, they can click Delete from the bottom navigation bar.

The screenshot shows a Microsoft Internet Explorer browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The website header features the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the header is a navigation menu with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The main content area has four buttons: Reinststate / Transfers, Packages, Insured Details, and Confirm. The Reinststate / Transfers button is active. The page displays the following information:

|            |  |           |                                   |               |        |                         |
|------------|--|-----------|-----------------------------------|---------------|--------|-------------------------|
| Policy ID: | <input type="text" value="12345"/>     | Division: | <input type="text" value="0009"/> | COMPANY ABC   | Owner: | ABCC                    |
|            |  |           |                                   | Main Division |        | Atlantic Regional Group |
| Ext. ID:   | <input type="text" value="500293428"/> |           | JOHN SMITH                        |               |        | 500293428               |

Below the information is the section "Member Reinststate / Transfers - Confirm". The text reads: "The collection of the enrollment data for this member has been done. Please select 'submit' to approve the details." At the bottom right of the page, there are two buttons: "Submit" and "Delete". The browser's status bar at the bottom shows "Done" and "Local intr...".

## General - Membership Details



Within the General – Membership Details tab, the user will be able to

- View/Update Employment Details
- View/Update Cross Reference IDs
- View/Update Salary Information

*Note: Users with inquiry only access will only be able to view the above information.*

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search **General** Member Selection Coverages Services

Miscellaneous **Membership Details** Member Activity

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

### Membership Details

Employment Details

Occupation Category: Senior executive management and professionals  
Occupation: ACCOUNTANT  
Permanent Employment Date: 01Oct2006

Cross References

Alternate ID (1): Alternate ID (2): Previous Membership:

Salary Information

| Salary      | Frequency | Hours per Week | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. | Calculated Annual Salary |
|-------------|-----------|----------------|-----------|-----------------|-----------|------------------|--------------------------|
| \$65,000.00 | Yearly    |                | 01Oct2006 | 17Nov2006       |           |                  | \$65,000.00              |

Add Update Query

Local intranet

## General - Membership Details *continued...*

### Employment Details

To add or modify occupation information, select General from the navigation bar on the top of the screen then the Membership Details tab. Click the radio button to the left of the Employment Details title, then click Update from the navigation bar on the bottom of the screen .

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Miscellaneous **Membership Details** Member Activity

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

### Membership Details

Employment Details

Occupation Category: Senior executive management and professionals  
Occupation: ACCOUNTANT  
Permanent Employment Date: 01Oct2006

Cross References

Alternate ID (1): Alternate ID (2): Previous Membership:

Salary Information

| Salary      | Frequency | Hours<br>per Week | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. | Calculated<br>Annual Salary |
|-------------|-----------|-------------------|-----------|-----------------|-----------|------------------|-----------------------------|
| \$65,000.00 | Yearly    |                   | 01Oct2006 | 17Nov2006       |           |                  | \$65,000.00                 |

Add Update Query

Local intranet

## General - Membership Details *continued...*

### Employment Details *continued..*

Select the appropriate Occupation Category from the drop down menu and enter a more detailed description in the space provided. Selecting "ALL" from the dropdown will provide the user with an overview of all available categories, "ALL" cannot be selected as an option. The user is to select a category that is closest to the descriptions provided and then enter a more detailed description in the text field entitled Occupation

Click Save to submit the changes.

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Miscellaneous **Membership Details** Member Activity

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

### Update Membership Details

#### Employment Details

Occupation Category:

- Construction Trades, Hospitality Occupations**  
Painter, carpenter, installer, builder, journeymen, bartender, waiter, housekeeping
- Foreman in Production and Manufacturing**  
Supervisory role with no operational duties
- Health and Education**  
Nurse, teacher, social worker, personal care worker, nurse's aide, counsellor
- High Risk Occupations**  
Policeman, fireman, airline pilot, religious representatives, artists
- Labourers and Heavy Equipment Operators**  
Janitor, warehouseman, security guard, shipper, truck driver, cleaner, farmer, driller, labourer
- Management, Supervisory and Technical staff**  
Managing clerical and office personnel, analyst, programmer, consultant, field professionals
- Office and Clerical staff**  
Bookkeeper, accounting clerk, secretary, customer service representative, administrative service
- Production, Manufacturing, Short Haul deliverymen**  
Assembler, machine operator, fabricator, deliverymen, shipper/receiver
- Technicians and Technologists**  
Laboratory technologist, draftsman, occupation therapist, speech therapist, dental assistant
- Tradesman - Group A**  
Sheet metal worker, pipe fitter, millwright, welder, machinist, assembler
- Tradesman - Group B**  
Plumber, mechanic, cabinetmaker, electrician
- Sales and Service, Field Technicians**  
Hairdresser, repairman, baker, cashier, retail and stock clerk, grocer, surveyor, assayer
- Senior executive management and professionals**  
CFO, president, director, doctor, architect, engineer (office based), pharmacist, lawyer, comptroller, scientists (primarily lab)

Occupation:

Permanent Employment Date:

Save Cancel

Local intranet

## General - Membership Details *continued...*

### Cross References

In some circumstances, an employee may have two different identification numbers. These numbers can be linked so the user can easily navigate between the two IDs. The numbers must exist in the Cross Reference field for this to happen. To enter or change this information, click the radio button to the left of the Cross Reference title and then click the Update option from the navigation bar on the bottom of the screen. The following screen will appear. Enter the appropriate information and then click Save. Please note that the user must also have access to the group and section in which the other ID resides in order to use this function.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Below this is a sub-navigation bar with Search, General, Member Selection, Coverages, and Services. A secondary bar contains buttons for Miscellaneous, Membership Details (selected), Member Activity, and Banking. The main content area displays member information: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. Below this is the "Update Membership Details" section, which includes a "Cross References" subsection. This subsection contains four input fields: "Alternate ID (1)", "Alternate ID (2)", "Previous Membership", and "Other ID". There is also a "Package" dropdown menu and a "Detach" checkbox. At the bottom of the page, there are "Save" and "Cancel" buttons. The browser's status bar at the very bottom shows "Done" and "Local intranet".

## General - Membership Details *continued...*

### Salary Information

To add or modify salary information, select General from the navigation bar on the top of the screen and then the Membership Details tab. Click the radio button to the left of the Salary information field. If there is no salary information on the screen, select the Add option from the navigation bar on the bottom of the screen. If salary information is present, the Add function or the Update function could be selected, the choice is dependent on the effective date of the change. If the effective date of the change is less than, or equal to, the effective date of the current salary information, the user would select the Update option. If the effective date being entered is greater than the effective date of the current salary, the user would select the Add function from the navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Below this is a search bar and a secondary navigation bar with tabs for Search, General, Member Selection, Coverages, and Services. The "Membership Details" tab is selected, and sub-tabs for Miscellaneous, Membership Details, and Member Activity are visible. The page content displays member information: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. Under "Membership Details", there are three radio buttons: "Employment Details" (selected), "Cross References", and "Salary Information". The "Employment Details" section shows Occupation Category: Senior executive management and professionals, Occupation: ACCOUNTANT, and Permanent Employment Date: 01Oct2006. The "Salary Information" section contains a table with the following data:

| Salary      | Frequency | Hours per Week | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. | Calculated Annual Salary |
|-------------|-----------|----------------|-----------|-----------------|-----------|------------------|--------------------------|
| \$65,000.00 | Yearly    |                | 01Oct2006 | 17Nov2006       |           |                  | \$65,000.00              |

At the bottom of the page, there are buttons for "Add", "Update", and "Query". The browser status bar shows "Done" and "Local intranet".



## General - Membership Details *continued...*

### Update Salary Information

If salary information is already on the screen and the user is changing the information but the effective date of the change is less than, or equal to, the effective date of the current salary information then the information needs to be updated, and not added. The Update option would have been selected from the navigation bar on the bottom of the previous screen for the following screen to appear. Enter the revised salary information and then click Save.

*Note:* If an hourly rate is entered, then the number of hours must also be entered in the Hours per Week field.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search **General** Member Selection Coverages Services

Miscellaneous **Membership Details** Member Activity

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

### Update Membership Details

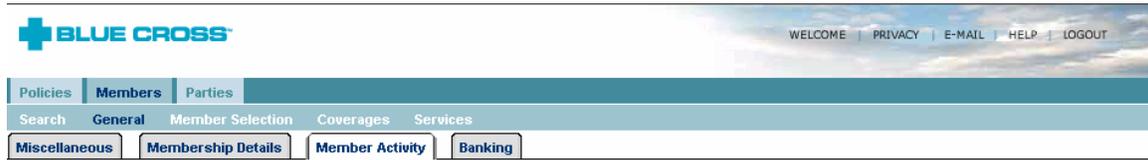
Salary Information

| Salary   | Frequency | Hours per Week | Eff. Dt.   |
|----------|-----------|----------------|------------|
| 65000.00 | Yearly    |                | 1 Oct 2006 |

Save Cancel

Local intranet

## General - Member Activity



Within the General – Member Activity tab the user will be able to

- View the history of transfers and reinstatements
- Transfer the member to another policy/division

*Note: Users with inquiry only access will only be able to view the above information.*

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search **General** Member Selection Coverages Services

Miscellaneous **Membership Details** **Member Activity** Banking

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Member Activity**

| Policy ID | Division | Eff.Dt.   | Eff.Trans.Dt. | Term. Date | Term. Trans. Date | Status |
|-----------|----------|-----------|---------------|------------|-------------------|--------|
| 12345     | 000      | 01Oct2006 | 17Nov2006     |            |                   |        |

Transfer Query

## General - Member Activity *continued...*

### Transfers

To transfer an employee to a new policy/division, the user must first have security access to that policy/division. If the user does not have access, please fax the request to the Blue Cross Customer Administration team for processing.

To transfer online, the user is to select the General - Member Activity tab. Click transfer from the blue navigation bar on the bottom of the screen. The following screen will be presented. This takes the user into a workflow to review the current information and benefits and to allow the user to make any necessary changes.

The user must enter the effective date, the new policy and division number and then click the Query button to review the first step of the workflow.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the Blue Cross logo on the left and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT" on the right. Below the header is a navigation bar with tabs for "Policies", "Members", and "Parties". Under the "Members" tab, there are sub-tabs for "Search", "General", "Member Selection", "Coverages", and "Services". The "Reinstate / Transfers" section is active, displaying the following information:

Policy ID: 12345    Division 0009    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group  
Ext. ID: 500293428    JOHN SMITH    500293428

Below this information is the "Member Transfers" section, which contains the following form fields:

Effective Date: 1 Dec 2006  
Policy: 12345  
Division: 001

A "Query" button is located below the form fields. At the bottom of the page, there are "Continue", "Cancel", and "Delete" buttons. The browser's status bar at the bottom shows "Local intranet".

## General - Member Activity *continued...*

### Transfers *continued...*

Once the user has clicked the query button from the previous screen, the following information will be presented. The user is then able to change the province in which claims are to be adjudicated, if required. Click Continue from the navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page content includes the Blue Cross logo and navigation links (WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT). A menu bar contains "Policies", "Members", and "Parties". Below this is a sub-menu with "Search", "General", "Member Selection", "Coverages", and "Services". The "Reinstate / Transfers" section is active, displaying member information: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. The "Member Transfers" section has a form with "Effective Date" (1 Dec 2006), "Policy" (12345), and "Division" (001). A "Query" button is present. Below the form, details are shown: Company Name: COMPANY ABC, Reason for Division: Sub Division, External ID: 500293428, Health Care Province: NB. At the bottom right, there are "Continue", "Cancel", and "Delete" buttons. The browser status bar shows "Done" and "Local Intra".

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

BLUE CROSS WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search **General** Member Selection Coverages Services

Reinstate / Transfers

Policy ID: 12345 Division 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

Member Transfers

Effective Date: 1 Dec 2006

Policy: 12345

Division: 001

Query

Company Name: COMPANY ABC  
Reason for Division: Sub Division  
External ID: 500293428  
Health Care Province: NB

Continue Cancel Delete

Done Local Intra



## General - Member Activity *continued...*

### Transfers *continued...*

Once the user clicks Cancel from the pop-up on the previous screen, they can select new benefit packages or reselect the current package if the package is not changing. If there is a change to the status, the Rating Status can be changed in this screen. For example, if the ID is going from Single to Family then select Family from the dropdown boxes to the right of the rating status. Click Continue to proceed through the workflow.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

Reinstate / Transfers **Packages**

Policy ID: 12345 Division 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

If packages have rating status's marked with a \* they must have the same value

|                               |   |  |
|-------------------------------|---|--|
| <input type="radio"/> Medical | AA - MEDICAL PACKAGE 1<br>5 Drugs<br>1 Extended Health Benefits<br>F Travel<br>4 Hospital | Mandatory<br>Health Care Province: NB Rating Status: Family<br>Waive: <input type="checkbox"/> Waive Reason: [ ] |
| <input type="radio"/> Dental  | AA - DENTAL PACKAGE 1<br>9 Dental   | Mandatory<br>Health Care Province: NB Rating Status: Family<br>Waive: <input type="checkbox"/> Waive Reason: [ ] |

Select a Life Coverage Option

|                                       |  |  |
|---------------------------------------|--|--|
| <input checked="" type="radio"/> Life | A - ALL EMPLOYEES LIFE<br>3 Basic Life<br>1 Accidental Death & Dismemberment | Mandatory<br>Waive: <input type="checkbox"/> Waive Reason: [ ] |
|---------------------------------------|--|--|

Continue Cancel Delete

Done Local Intra

## General - Member Activity *continued...*

### Transfers *continued...*

Insured Details is the next tab in the Transfer Workflow. The dependent information that was on file at the time of termination will be pre-populated on this screen.

Only additional participants can be added from here by clicking the More Insureds button. If the user needs to change or delete the information on file, this will be done in a second step once the transfer has been saved. See the section on Member Selection – Insureds: Modifying Insured Details for details on this additional step.

Click Continue to proceed.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page content includes the Blue Cross logo and navigation links (WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT). The main navigation menu has tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Insured Details" sub-tab is active, showing details for Policy ID 12345, Division 0009, COMPANY ABC, and Owner ABCC. It lists three insureds: JOHN SMITH (Member, born 01Jan2006), JANE SMITH (Spouse, born 01Jan1970), and JOHNNY SMITH (Child, born 01Jun2005). A "More Insureds" button is located at the bottom of the insured list. At the bottom of the page, there are "Continue", "Cancel", and "Delete" buttons.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

BLUE CROSS WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Reinstate / Transfers Packages Insured Details

Policy ID: 12345 Division 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

### Member Transfers - Insured Details

| First Name | Relationship    | Date of Birth |
|------------|-----------------|---------------|
| JOHN       | Member          | 01Jan2006     |
| SMITH      |                 |               |
| Gender     | Privacy Consent |               |
| Male       | Yes             |               |

| First Name | Relationship    | Date of Birth |
|------------|-----------------|---------------|
| JANE       | Spouse          | 01Jan1970     |
| SMITH      |                 |               |
| Gender     | Privacy Consent |               |
| Female     | Yes             |               |

| First Name       | Relationship | Date of Birth   |
|------------------|--------------|-----------------|
| JOHNNY           | Child        | 01Jun2005       |
| SMITH            |              |                 |
| Dependent Status | Gender       | Privacy Consent |
| Regular          | Male         | Yes             |

[More Insureds](#)

Continue Cancel Delete

Done Local Intra

## General - Member Activity *continued...*

### Transfers *continued...*

Once the user clicks Continue from the previous screen, the following confirmation screen will be presented. The user must click Submit in order to save the changes. If at any time during the workflow the user wants to cancel the transfer, they can click Delete from the bottom navigation bar.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the Blue Cross logo and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT".

The main navigation area includes tabs for "Policies", "Members", and "Parties". Under "Members", there are sub-tabs for "Search", "General", "Member Selection", "Coverages", and "Services". The "General" sub-tab is active, showing a sub-menu with "Reinstatement / Transfers", "Packages", "Insured Details", and "Confirm". The "Confirm" sub-tab is selected.

The content area displays the following information:

|                    |               |                              |  |
|--------------------|---------------|------------------------------|--|
| Policy ID: 12345   | Division 0009 | COMPANY ABC<br>Main Division | Owner: ABCC<br>Atlantic Regional Group |
| Ext. ID: 500293428 | JOHN SMITH    |                              | 500293428                              |

Below the information, the heading "Member Reinstatement / Transfers - Confirm" is followed by the text: "The collection of the enrollment data for this member has been done. Please select 'submit' to approve the details."

At the bottom of the page, there are two buttons: "Submit" and "Delete". The browser's status bar at the very bottom shows "Done" and "Local intranet".

## Member Selection - Insureds

The screenshot shows the Blue Cross web application interface. At the top left is the Blue Cross logo. To the right, there are links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the logo is a horizontal menu with tabs for Policies, Members, and Parties. Under the Members tab, there is a sub-menu with Search, General, Member Selection, Coverages, and Services. Below this, there is another row of tabs: Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA.

Within the Member Selection – Insureds tab the user will be able to

- Change the rating status of a plan, ex Single, Couple, Family
- Add/Terminate Spouse and/or Dependent Information
- Update Spouse and/or Dependent Information

*Note: Users with inquiry only access will only be able to view the above information.*

The screenshot shows the Blue Cross web application interface in a Microsoft Internet Explorer browser window. The browser title is "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser address bar shows "File Edit View Favorites Tools Help". The Blue Cross logo is at the top left, and navigation links (WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT) are at the top right. The main menu is the same as in the previous screenshot, with the "Insureds" tab selected. Below the menu, the following information is displayed:

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group  
 Ext. ID: 500293428 JOHN SMITH 500293428  
 Pending

**Insured List**

| <input type="checkbox"/> | Insured Status | Eff. Dt.                     | Eff. Trans. Date | Term. Dt.     | Term. Trans. Dt. |           |           |
|--------------------------|----------------|------------------------------|------------------|---------------|------------------|-----------|-----------|
| <input type="checkbox"/> | Family         | 01Oct2006                    | 17Nov2006        |               |                  |           |           |
| <input type="checkbox"/> | Tag #          | Name                         | Gender           | Date of Birth | Age              | Eff. Dt.  | Term. Dt. |
| <input type="checkbox"/> | 00             | <a href="#">JOHN SMITH</a>   | Male             | 01Jan1970     | 36               | 01Oct2006 |           |
|                          |                | Member                       |                  |               |                  |           |           |
| <input type="checkbox"/> | 01             | <a href="#">JANE SMITH</a>   | Female           | 01Jan1970     | 36               | 01Oct2006 |           |
|                          |                | Spouse                       |                  |               |                  |           |           |
| <input type="checkbox"/> | 02             | <a href="#">JOHNNY SMITH</a> | Male             | 01Jun2005     | 1                | 01Oct2006 |           |
|                          |                | Child Regular                |                  |               |                  |           |           |

At the bottom right of the page, there are buttons for "Add Insured", "Update", and "Query". The browser status bar at the bottom shows "Done" and "Local Intra".

## Member Selection – Insureds *continued...*

### Changing to Single Status

The following outlines the steps to change the rating status from a greater rating status to a lesser rating status, ex. family status to couple or single status or couple status to single status. Once the user has accessed the employee's information, they are to select the Member Selection – Insureds tab. The following screen will be presented.

Click on the box to the left of the Insured Status title and then click on the box or boxes to the left of the participants who will be removed/ terminated from the plan. Click Update to proceed.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Insureds** Benefits Co-ordination of Benefits Beneficiaries HSA

Policy ID:  Division:  COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Insured List**

| <input checked="" type="checkbox"/> | Insured Status                                   | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |           |
|-------------------------------------|--|-----------|------------------|-----------|------------------|-----------|
|                                     | Family   | 01Oct2006 | 17Nov2006        |           |                  |           |
| Tag #                               | Name   | Gender    | Date of Birth    | Age       | Eff. Dt.         | Term. Dt. |
| <input type="checkbox"/>            | 00 <a href="#">JOHN SMITH</a><br>Member          | Male      | 01Jan1970        | 0         | 01Oct2006        |           |
| <input checked="" type="checkbox"/> | 01 <a href="#">JANE SMITH</a><br>Spouse          | Female    | 01Jan1970        | 36        | 01Oct2006        |           |
| <input checked="" type="checkbox"/> | 02 <a href="#">JOHNNY SMITH</a><br>Child Regular | Male      | 01Jun2005        | 1         | 01Oct2006        |           |

Add Insured Update Query

Local intranet

## Member Selection – Insureds *continued...*

### Changing to Single Status *continued....*

Once the user has selected Update from the previous screen, the following will be presented. Select the new status from the dropdown menu and enter the effective date of the change. Enter a termination date, one day prior to the effective date of the change, beside each participant who will no longer be covered under the plan. Click Save to process the changes.

*Note:* the user cannot go back more than 31 days in the past. Requests that are beyond the 31 day limitation must be sent to Blue Cross for manual processing since a claim check is required for those participants who are being terminated.

The screenshot shows a web browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The main content area features the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the logo is a navigation menu with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, there are buttons for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The Insureds button is selected.

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

#### Insured List

|                 |              |                   |               |           |      |      |    |     |      |
|-----------------|--------------|-------------------|---------------|-----------|------|------|----|-----|------|
| Insured Status: | Single       | Status Eff. Dt.:  | 1             | Oct       | 2006 |      |    |     |      |
| Tag #01         | Relationship | Gender            | Date of Birth | Term. Dt. |      |      |    |     |      |
| First Name:     | JANE         | Spouse            | Female        | 1         | Jan  | 1970 | 30 | Sep | 2006 |
| Last Name:      | SMITH        |                   |               |           |      |      |    |     |      |
| Tag #02         | Relationship | Gender            | Date of Birth | Term. Dt. |      |      |    |     |      |
| First Name:     | JOHNNY       | Child             | Male          | 1         | Jun  | 2005 | 30 | Sep | 2006 |
| Last Name:      | SMITH        | Dependent Status: | Regular       |           |      |      |    |     |      |

Save Cancel Delete

Local intranet

## Member Selection – Insureds *continued...*

### Changing to Single Status *continued....*

Once the user has saved the changes from the previous screen, they will be brought back to the original screen and the changes will be displayed.

The screenshot displays a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation area features tabs for Policies, Members, and Parties, with sub-tabs for Search, General, Member Selection, Coverages, and Services. Below this, there are buttons for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA.

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Insured List** [Show History](#)

| <input type="checkbox"/> | Insured Status | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |
|--------------------------|----------------|-----------|------------------|-----------|------------------|
| <input type="checkbox"/> | Single         | 01Oct2006 |                  |           |                  |

[Show History](#)

| <input type="checkbox"/> | Tag # | Name                       | Gender | Date of Birth | Age | Eff. Dt.  | Term. Dt. |
|--------------------------|-------|----------------------------|--------|---------------|-----|-----------|-----------|
| <input type="checkbox"/> | 00    | <a href="#">JOHN SMITH</a> | Male   | 01Jan1970     | 0   | 01Oct2006 |           |

Member

**Add Insured Update Query**

Local intr

## Member Selection – Insureds *continued...*

### Changing to Family Status

The following outlines the steps to change the rating status from a lesser rating status to a greater rating status, ex single status to couple or family status, or couple status to family status. Once the user has accessed the employee's information, they are to select the Member Selection – Insureds tab. The following screen will be presented.

*Note:* If there are grey buttons on the screen that state **Show History**, please click the grey button. If any of the participants listed in the history are to be reinstated, please refer to the section entitled Changing the Rating Status to Family and Reinstating Participants. It is important the participants are not entered a second time for claim purposes.

Click on the box to the left of the Insured Status title and then click Add Insured from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page header includes the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, the Insureds sub-tab is selected. The page displays the following information:

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

**Insured List**

| <input checked="" type="checkbox"/> | Insured Status | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |
|-------------------------------------|----------------|-----------|------------------|-----------|------------------|
|                                     | Single         | 01Oct2006 | 17Nov2006        |           |                  |

| <input type="checkbox"/> | Tag # | Name       | Gender | Date of Birth | Age | Eff. Dt.  | Term. Dt. |
|--------------------------|-------|------------|--------|---------------|-----|-----------|-----------|
|                          | 00    | JOHN SMITH | Male   | 01Jan1970     | 36  | 01Oct2006 |           |

Member

At the bottom of the page, there is a blue navigation bar with buttons for "Add Insured", "Update", and "Query".

## Member Selection – Insureds *continued...*

### Changing to Family Status *continued...*

Once the Add Insured button has been selected from the previous screen, the following screen will be presented. Select the new status from the dropdown menu and enter the effective date of the change. Enter the participant's information in the fields presented. If additional participants are to be entered, click the grey More Insureds button.

If dependents are to be late, meaning that they are to be medically underwritten, additional paperwork is required. The user may select the Late Applicant button but without the paperwork the participant will not be underwritten. If the user is unsure of the process then the change should be forwarded to Blue Cross for processing.

Click Save to process the changes.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Insureds **Benefits** Co-ordination of Benefits Beneficiaries HSA

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

Insured List

Insured Status: Family Status Eff. Dt.: 1 Oct 2006

| Tag #00          | Relationship | Gender | Date of Birth | Term. Dt. |
|------------------|--------------|--------|---------------|-----------|
| First Name: JOHN | Member       | Male   | 01Jan1970     |           |
| Last Name: SMITH |              |        |               |           |

First Name: Relationship Gender Date of Birth  
Day Month

Last Name: Dependent Status:

Late Applicant

**More Insureds**

Save Cancel

Done Local intr...

## Member Selection – Insureds *continued...*

### Changing to Family Status and Reinstating Participants

The following outlines the steps to change the rating status from a lesser rating status to a greater rating status, ex single status to couple or family status, or couple status to family status. Once the user has accessed the employee's information, they are to select the Member Selection – Insureds tab. The following screen will be presented.

When there are grey buttons on the screen that state **Show History**, please click the grey button above the listing of insureds. If the participant being added was previously on the plan it is important that they are not entered a second time for claim purposes.

The screenshot displays a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar shows the URL "http://www.abcc.com/". The page features the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation menu includes Policies, Members, and Parties. The Members section is active, with sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection tab is selected, and the Insureds sub-tab is active. The page displays the following information:

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428  
Pending

Insured List [Show History](#)

| <input checked="" type="checkbox"/> | Insured Status | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |
|-------------------------------------|----------------|-----------|------------------|-----------|------------------|
|                                     | Single         | 01Oct2006 |                  |           |                  |

[Show History](#)

| <input type="checkbox"/> | Tag # | Name                       | Gender | Date of Birth | Age | Eff. Dt.  | Term. Dt. |
|--------------------------|-------|----------------------------|--------|---------------|-----|-----------|-----------|
|                          | 00    | <a href="#">JOHN SMITH</a> | Male   | 01Jan1970     | 36  | 01Oct2006 |           |

Member

At the bottom of the page, there are buttons for Add Insured, Update, and Query, and a "Local intranet" icon.

## Member Selection – Insureds *continued...*

### Changing to Family Status and Reinstating Participants *continued..*

From the previous screen, once the history is displayed, click on the box to the left of the Insured Status and click on the names of those participants who are being reinstated. If additional dependents are to also be added, please follow the steps as outlined in the section entitled Adding a Participant to a Family plan (Spouse or Dependent) after the steps to reinstate the previous participants have been saved.

Click Update to proceed to the next screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page features the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation bar includes "Policies", "Members", and "Parties". Under "Members", there are sub-tabs for "General", "Member Selection", "Coverages", and "Services". The "Member Selection" sub-tab is active, showing options for "Insureds", "Benefits", "Co-ordination of Benefits", "Beneficiaries", and "HSA".

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group  
 Ext. ID:  JOHN SMITH 500293428

Insured List [Show History](#)

| <input checked="" type="checkbox"/> | Insured Status | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |
|-------------------------------------|----------------|-----------|------------------|-----------|------------------|
| <input checked="" type="checkbox"/> | Single         | 01Oct2006 |                  |           |                  |

[Hide History](#)

| <input type="checkbox"/>            | Tag # | Name  | Gender | Date of Birth | Age | Eff. Dt.  | Term. Dt. |
|-------------------------------------|-------|---|--------|---------------|-----|-----------|-----------|
| <input type="checkbox"/>            | 00    | <a href="#">JOHN SMITH</a><br>Member          | Male   | 01Jan1970     | 36  | 01Oct2006 |           |
| <input checked="" type="checkbox"/> | 01    | <a href="#">JANE SMITH</a><br>Spouse          | Female | 01Jan1970     |     | 01Oct2006 | 30Sep2006 |
| <input checked="" type="checkbox"/> | 02    | <a href="#">JOHNNY SMITH</a><br>Child Regular | Male   | 01Jun2005     |     | 01Oct2006 | 30Sep2006 |

At the bottom right, there are buttons for "Add Insured", "Update", and "Query".

## Member Selection – Insureds *continued...*

### Changing to Family Status and Reinstating Participants *continued..*

Once Update has been selected from the previous screen, the following will appear. Select the appropriate status from the dropdown bar and indicate the effective date.

To reinstate the participants select the wording “Day”, “Month”, “Year” from the dropdown boxes in the Term Date field.

Click Save to process the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page content includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the logo is a navigation bar with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, there are buttons for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The Insureds button is selected.

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

**Insured List**

Insured Status:  Status Eff. Dt.:

| Tag #   | First Name | Last Name | Relationship | Gender | Date of Birth | Term. Dt.      |
|---------|------------|-----------|--------------|--------|---------------|----------------|
| Tag #01 | JANE       | SMITH     | Spouse       | Female | 1 Jan 1970    | Day Month Year |
| Tag #02 | JOHNNY     | SMITH     | Child        | Male   | 1 Jun 2005    | Day Month Year |

Dependent Status:

At the bottom right of the form area, there are buttons for Save, Cancel, and Delete. The browser's status bar at the bottom shows "Local Intra".

## Member Selection – Insureds *continued...*

### Adding a Participant to a Family plan (Spouse or Dependent)

To add another participant to a plan that is already family status, go to the Member Selections – Insureds tab and select Add Insured from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page header includes the Blue Cross logo and navigation links: WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Under Members, there are sub-tabs: General, Member Selection, Coverages, and Services. The "Insureds" tab is selected, with sub-tabs for Benefits, Co-ordination of Benefits, Beneficiaries, and HSA.

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Insured List**

| <input type="checkbox"/> | Insured Status | Eff. Dt.                                      | Eff. Trans. Date | Term. Dt.     | Term. Trans. Dt. |           |           |
|--------------------------|----------------|---|------------------|---------------|------------------|-----------|-----------|
|                          | Family         | 01Oct2006                                     | 17Nov2006        |               |                  |           |           |
| <input type="checkbox"/> | Tag #          | Name  | Gender           | Date of Birth | Age              | Eff. Dt.  | Term. Dt. |
| <input type="checkbox"/> | 00             | <a href="#">JOHN SMITH</a><br>Member          | Male             | 01Jan1970     | 36               | 01Oct2006 |           |
| <input type="checkbox"/> | 01             | <a href="#">JANE SMITH</a><br>Spouse          | Female           | 01Jan1970     | 36               | 01Oct2006 |           |
| <input type="checkbox"/> | 02             | <a href="#">JOHNNY SMITH</a><br>Child Regular | Male             | 01Jun2005     | 1                | 01Oct2006 |           |

At the bottom of the page, there is a blue navigation bar with buttons: Add Insured, Update, and Query. The browser status bar shows "Done" and "Local intranet".

## Member Selection – Insureds *continued...*

### Adding a Participant to a Family plan (Spouse or Dependent) *continued...*

Once the user has selected Add Insured from the previous screen, the following screen will be presented. Please add the details of the new participant in the fields provided. If additional participants are to be added click the grey More Insureds button.

Click Save to submit the changes.

The screenshot shows a web browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The application header includes the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and it contains several buttons: Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The Insureds button is selected.

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

#### Insured List

Insured Status: Family Status Eff. Dt.: 01Oct2006

| Tag #   | Relationship | Gender | Date of Birth | Term. Dt. |
|---|--------------|--------|---------------|-----------|
| Tag #00   | Member       | Male   | 01Jan1970     |           |
| First Name: JOHN<br>Last Name: SMITH                                |              |        |               |           |
| Tag #01   | Spouse       | Female | 01Jan1970     |           |
| First Name: JANE<br>Last Name: SMITH                                |              |        |               |           |
| Tag #02   | Child        | Male   | 01Jun2005     |           |
| First Name: JOHNNY<br>Last Name: SMITH<br>Dependent Status: Regular |              |        |               |           |

Relationship Gender Date of Birth  
First Name:    Day  Month

Last Name:  Dependent Status:

Late Applicant

[More Insureds](#)

Save Cancel

Done Local intranet

## Member Selection – Insureds *continued...*

### Terminating a Participant with no Resulting Change to Status

To terminate a participant's benefit coverage, select Member Selection – Insureds. The following screen will be presented. Click the box to the left of the participant to be terminated and then click Update from the blue navigation bar on the bottom of the screen.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Insureds** Benefits Co-ordination of Benefits Beneficiaries HSA

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

**Insured List**

| <input type="checkbox"/>            | Insured Status                                   | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |           |
|-------------------------------------|--|-----------|------------------|-----------|------------------|-----------|
| <input type="checkbox"/>            | Family   | 01Oct2006 | 17Nov2006        |           |                  |           |
| Tag #                               | Name   | Gender    | Date of Birth    | Age       | Eff. Dt.         | Term. Dt. |
| <input type="checkbox"/>            | 00 <a href="#">JOHN SMITH</a><br>Member          | Male      | 01Jan1970        | 36        | 01Oct2006        |           |
| <input checked="" type="checkbox"/> | 01 <a href="#">JANE SMITH</a><br>Spouse          | Female    | 01Jan1970        | 36        | 01Oct2006        |           |
| <input type="checkbox"/>            | 02 <a href="#">JOHNNY SMITH</a><br>Child Regular | Male      | 01Jun2005        | 1         | 01Oct2006        |           |

Add Insured Update Query

Done Local Intra

## Member Selection – Insureds *continued...*

### Terminating a Participant with no Resulting Change to Status *continued...*

Once Update has been selected from the previous screen, the following screen will be presented. Enter the termination date by selecting the appropriate information from the dropdown bars. Click Save to process the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, the Insureds sub-tab is selected. The page displays the following information:

Policy ID: 12345    Division: 000 9    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group  
Ext. ID: 500293428    JOHN SMITH    500293428

**Insured List**

Insured Status: Family    Status Eff. Dt.: 01Oct2006  
Tag #:01    Relationship    Gender    Date of Birth    Term. Dt.

|             |       |        |        |   |     |      |   |     |      |
|-------------|-------|--------|--------|---|-----|------|---|-----|------|
| First Name: | JANE  | Spouse | Female | 1 | Jan | 1970 | 1 | Nov | 2006 |
| Last Name:  | SMITH |        |        |   |     |      |   |     |      |

At the bottom of the page, there are buttons for Save, Cancel, and Delete. The browser's status bar shows "Local intr..."

## Member Selection – Insureds *continued...*

### Terminating a Participant with a Resulting Change to Status

Please follow the steps as outlined in the section entitled Changing to Single Status.

### Surviving Spouse Benefits

To apply surviving spouse benefits, please forward the request to the administration team at Blue Cross for manual processing.

### Updating Member or Dependent Information

To modify details on the member or any participants, click the box to the left of the individual's name and then click Update from the blue navigation bar on the bottom of the screen.

The screenshot displays the 'ABCC Enrollment' web application in Microsoft Internet Explorer. The page title is 'ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross'. The browser's address bar shows the URL 'http://www.abcc.com/abcc/enrollment/insureds.asp?PolicyID=12345&Division=0009'. The application header includes the Blue Cross logo and navigation links for 'WELCOME', 'PRIVACY', 'E-MAIL', 'HELP', and 'LOGOUT'. The main navigation menu has tabs for 'Policies', 'Members', and 'Parties'. The 'Members' tab is active, and the 'Member Selection' sub-tab is selected. Below the navigation, there are tabs for 'Insureds', 'Benefits', 'Co-ordination of Benefits', 'Beneficiaries', and 'HSA'. The 'Insureds' tab is active, showing details for Policy ID 12345, Division 0009, COMPANY ABC, and Owner ABCC. The Ext. ID is 500293428, and the member name is JOHN SMITH. The 'Insured List' table shows three entries: JOHN SMITH (Member), JANE SMITH (Spouse), and JOHNNY SMITH (Child Regular). The bottom of the screen features a blue navigation bar with buttons for 'Add Insured', 'Update', and 'Query', and a 'Local intranet' icon.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Insureds Benefits Co-ordination of Benefits Beneficiaries HSA

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

Insured List

| <input type="checkbox"/>            | Insured Status                   | Eff. Dt.  | Eff. Trans. Date | Term. Dt. | Term. Trans. Dt. |           |
|-------------------------------------|----------------------------------|-----------|------------------|-----------|------------------|-----------|
|                                     | Family                           | 01Oct2006 | 17Nov2006        |           |                  |           |
| Tag #                               | Name                             | Gender    | Date of Birth    | Age       | Eff. Dt.         | Term. Dt. |
| <input checked="" type="checkbox"/> | 00 JOHN SMITH<br>Member          | Male      | 01Jan1970        | 36        | 01Oct2006        |           |
| <input type="checkbox"/>            | 01 JANE SMITH<br>Spouse          | Female    | 01Jan1970        | 36        | 01Oct2006        |           |
| <input type="checkbox"/>            | 02 JOHNNY SMITH<br>Child Regular | Male      | 01Jun2005        | 1         | 01Oct2006        |           |

Add Insured Update Query

Local intranet

## Member Selection – Insureds *continued...*

### Updating Member or Dependent Information *continued...*

Once Update has been selected from the previous screen, the user is able to edit any of the fields below. Click Save to process the change.

Note: If the user is applying Surviving Spouse to the plan, the information is to be faxed to the Blue Cross administration team. Please do not enter this on the website.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The website header features the Blue Cross logo and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT". Below the header, there are tabs for "Policies", "Members", and "Parties". The "Members" tab is active, and sub-tabs include "Search", "General", "Member Selection", "Coverages", and "Services". Under "Member Selection", there are buttons for "Insureds", "Benefits", "Co-ordination of Benefits", "Beneficiaries", and "HSA".

Policy ID: 12345    Division: 0009    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group

Ext. ID: 500293428    JOHN SMITH    500293428

**Insured List**

Insured Status: Family    Status Eff. Dt.: 01Oct2006

| Tag #       | 00    | Relationship | Gender | Date of Birth |     |      | Term. Dt. |       |      |
|-------------|-------|--------------|--------|---------------|-----|------|-----------|-------|------|
| First Name: | JOHN  | Member       | Male   | 1             | Jan | 1970 | Day       | Month | Year |
| Last Name:  | SMITH |              |        |               |     |      |           |       |      |

At the bottom of the page, there are buttons for "Save", "Cancel", and "Delete". The browser's status bar shows "Done" and "Local intra".

## Member Selection – Insureds *continued...*

### Student Pre Registration

When a dependent reaches a specific age, as defined in the contract, they are no longer eligible for benefits unless they are continuing their education at a recognized post secondary institution. The contract may stipulate that the dependent is covered until their birthday, the end of the month, or the end of the year in which they reach this age. If the dependent is continuing their education and qualifies as a student, the user now has the option to pre register them as a student 60 days prior to the date in which they become eligible.

To pre register a student check the box to the left of the student's name and click Update in the navigation bar on the bottom of the screen.

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Insureds** Benefits Co-ordination of Benefits Beneficiaries HSA

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

#### Insured List

| <input type="checkbox"/>            | Insured Status | Eff. Dt.                                      | Eff. Trans. Date | Term. Dt.     | Term. Trans. Dt. |           |           |
|-------------------------------------|----------------|---|------------------|---------------|------------------|-----------|-----------|
|                                     | Family         | 01Oct2006                                     | 17Nov2006        |               |                  |           |           |
| <input type="checkbox"/>            | Tag #          | Name  | Gender           | Date of Birth | Age              | Eff. Dt.  | Term. Dt. |
|                                     | 00             | <a href="#">JOHN SMITH</a><br>Member          | Male             | 01Jan1970     | 37               | 01Oct2006 |           |
|                                     | 01             | <a href="#">JANE SMITH</a><br>Spouse          | Female           | 01Jan1970     | 37               | 01Oct2006 |           |
| <input checked="" type="checkbox"/> | 03             | <a href="#">JAIME SMITH</a><br>Child Regular  | Female           | 01Aug1986     | 20               | 01Oct2006 |           |
|                                     | 02             | <a href="#">JOHNNY SMITH</a><br>Child Regular | Male             | 01Jun2005     | 2                | 01Oct2006 |           |

Add Insured Update Query

javascript:top.uSubmit('MemberSelectionInsuredsList','memberSelectionsInsuredsListInquiry'); Local intranet

## Member Selection – Insureds *continued...*

### Student Pre Registration *continued...*

Once Update has been selected the user will be presented with the dependent's information and the option to Pre-Register them as a student. Simply check the Pre-Register Student box and then click Save in the navigation bar on the bottom of the screen.

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Insureds** Benefits Co-ordination of Benefits Beneficiaries HSA

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

**Insured List**

Insured Status: Family Status Eff. Dt.: 01Oct2006  
Tag #03 Relationship Gender Date of Birth Term. Dt.  
First Name: JAIME Child Female 1 Aug 1986 Day Month Year  
Last Name: SMITH Dependent Status: Regular  Pre-Register Student

Save Cancel Delete

Local intranet

## Member Selection – Insureds *continued...*

### Student Pre Registration *continued...*

Once the user selects Save from the previous screen they will be returned to the Member Selection Insureds screen. The screen will be updated indicating that a Student Pre-Registration change is pending. Once the dependent has reached the date in which they become eligible the user will see that the status below the dependent's name will no longer indicate Regular but it will indicate College/University.

New cards will be issued indicating a termination date of August of the following year adjacent to the student's name. The termination date is to remind the member that the student will no longer have coverage at the end of the school year. If the student is returning to school and still qualifies for benefits, the benefits will need to be reinstated in August of the year indicated on the card.

Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Insureds **Benefits** Co-ordination of Benefits Beneficiaries HSA

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

**Insured List**

| <input type="checkbox"/> | Insured Status | Eff. Dt.                                      | Eff. Trans. Date | Term. Dt.     | Term. Trans. Dt. |           |                                   |
|--------------------------|----------------|---|------------------|---------------|------------------|-----------|-----------------------------------|
|                          | Family         | 01Oct2006                                     | 17Nov2006        |               |                  |           |                                   |
| <input type="checkbox"/> | Tag #          | Name  | Gender           | Date of Birth | Age              | Eff. Dt.  | Term. Dt.                         |
| <input type="checkbox"/> | 00             | <a href="#">JOHN SMITH</a><br>Member          | Male             | 01Jan1970     | 37               | 01Oct2006 |                                   |
| <input type="checkbox"/> | 01             | <a href="#">JANE SMITH</a><br>Spouse          | Female           | 01Jan1970     | 37               | 01Oct2006 |                                   |
| <input type="checkbox"/> | 03             | <a href="#">JAIME SMITH</a><br>Child Regular  | Female           | 01Aug1986     | 20               | 01Oct2006 | *Pending Student Pre-Registration |
| <input type="checkbox"/> | 02             | <a href="#">JOHNNY SMITH</a><br>Child Regular | Male             | 01Jun2005     | 2                | 01Oct2006 |                                   |

Add Insured Update Query

Local Intra

## Member Selection - Benefits

Within the Member Selection – Benefits tab, the user will be able to

- Add/Update the coverage amounts for optional life benefits
- Add benefits packages
- Revise/Terminate current benefits packages
- View a summary of benefits

*Note: Users with inquiry only access will only be able to view the above information.*

Policy ID:  Division:  COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group  
 Ext. ID:  JOHN SMITH 500293428

### Benefit Selections

| Category | Code                     | Description                        | Eff. Dt.    | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|----------|--------------------------|------------------------------------|-------------|-----------------|-----------|------------------|
| Medical  | <input type="radio"/> AA | MEDICAL PACKAGE 1                  |             |                 |           |                  |
|          |                          | Rating Status: Family              |             |                 |           |                  |
|          |                          | 4 Hospital                         | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |                          | F Travel                           | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |                          | 1 Extended Health Benefits         | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          | 5 Drugs                  | 01 Oct 2006                        | 17 Nov 2006 |                 |           |                  |
| Dental   | <input type="radio"/> AA | DENTAL PACKAGE 1                   |             |                 |           |                  |
|          |                          | Rating Status: Family              |             |                 |           |                  |
|          | 9 Dental                 | 01 Oct 2006                        | 17 Nov 2006 |                 |           |                  |
| Life     | <input type="radio"/> A  | ALL EMPLOYEES LIFE                 |             |                 |           |                  |
|          |                          | 3 Basic Life                       | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |                          | 1 Accidental Death & Dismemberment | 01 Oct 2006 | 17 Nov 2006     |           |                  |

## Member Selection – Benefits *continued....*

### Add Coverage Amount – Optional Life Benefits Only

This option applies only to Optional Life, Optional Spouse, Optional Child, Critical Conditions and Optional AD&D benefits. To change the amount or to enter a new effective date greater than the date on file, the user would select the radio button to the left of the life option to be updated and then click the Add Coverage Amount option from the blue navigation bar on the bottom of the screen.

*Note:* To backdate or to change the amount without changing the effective date, please see the section on Update Coverage Amount – Optional Life Benefits Only.

The screenshot displays the Blue Cross ABCC Enrollment web application interface. At the top, there is a navigation bar with tabs for Policies, Members, and Parties. Below this, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection tab is active, showing a list of benefit options with radio buttons for selection. The interface includes a header with the Blue Cross logo and navigation links (WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT). A search bar and a list of tabs (Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, HSA) are also present. The main content area shows member details (Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC) and a table of benefit selections. The table lists various benefit packages (Medical, Dental, Life, Disability) with their respective coverage amounts and effective dates. A 'Benefit Summary' button is located at the bottom of the benefit list. At the very bottom, there is a blue navigation bar with buttons for 'Add Coverage Amount', 'Update Coverage Amount', 'Add Package', 'Revise Package', 'Terminate Package', and 'Query'. The status bar at the bottom shows a JavaScript error message and a 'Local Intra' icon.

**Benefit Selections**

| Benefit Selection  | Coverage Applied For | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|--|----------------------|-----------|-----------------|-----------|------------------|
| <input type="radio"/> AA MEDICAL PACKAGE 1<br>Rating Status: Family<br>4 Hospital<br>F Travel<br>45 Extended Health Benefits<br>10 Drugs |                      | 01Sep2003 | 28Aug2003       |           |                  |
| <input type="radio"/> AA DENTAL PACKAGE 1<br>Rating Status: Family<br>6G Dental  |                      | 01Sep2003 | 28Aug2003       |           |                  |
| <input type="radio"/> A ALL EMPLOYEES CRITICAL CONDITION<br>Rating Status: Family<br>C3 Critical Conditions                              | \$50,000.00          | 01May2005 | 23Apr2005       |           |                  |
| <input checked="" type="radio"/> A ALL EMPLOYEES OPTIONAL SPOUSE LIFE<br>1 Optional Spouse Life  | \$40,000.00          | 01Sep2001 | 17Aug2001       |           |                  |
| <input type="radio"/> A ALL EMPLOYEES LIFE 1<br>3 Basic Life   |                      | 01Jun2000 | 29May2000       |           |                  |
| <input type="radio"/> A ALL EMPLOYEES DISABILITY 1<br>3 Short Term Disability  |                      | 16Mar2000 | 30Mar2000       |           |                  |

**Benefit Summary**

**Navigation Bar:** Add Coverage Amount | Update Coverage Amount | Add Package | Revise Package | Terminate Package | Query

**Status Bar:** javascript:top.uSubmit('MemberSelectionInsuredsList','memberSelectionsInsuredsListInquiry'); Local Intra

## Member Selection – Benefits *continued...*

### Add Coverage Amount - Optional Life Benefits Only *continued...*

Once the user has selected Add Coverage Amount from the previous screen, the following is presented. The user can enter a new amount and a new effective date. Click Save to process the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, Products, and Parties. Below this is a sub-navigation bar with Search, General, Member Selection, Coverages, and Services. The "Member Selection" tab is active, and within it, the "Benefits" sub-tab is selected. The page displays member information: Policy ID: 12345, Division: 000 9, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. The "Benefit Selections" section shows "Employee Class: A" and "Package: ALL EMPLOYEES OPTIONAL SPOUSE LIFE". Under "Coverage Applied For", there is one entry: "1 Optional Spouse Life" with a coverage amount of "\$50000" and an effective date of "1 Dec 2006". At the bottom right of the form area, there are "Save" and "Cancel" buttons. The browser's status bar at the bottom shows "Done" and "Local intr..."

## Member Selection – Benefits *continued...*

### Update Coverage Amount – Optional Life Benefits Only

This option applies only to Optional Life, Optional Spouse, Optional Child, Critical Conditions and Optional AD&D benefits. To change the amount with the same effective date or to backdate the information, the user would select the radio button to the left of the life option to be updated and then click the Update Coverage Amount option from the blue navigation bar on the bottom of the screen.

*Note:* To change the amount or to enter a new effective date greater than the date on file, please see the section on Add Coverage Amount – Optional Life Benefits Only.

The screenshot displays the Blue Cross ABCC Enrollment system interface. At the top, there is a navigation bar with tabs for Policies, Members, and Parties. The Members tab is active, and sub-tabs for Search, General, Member Selection, Coverages, and Services are visible. Below this, there are buttons for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The main content area shows member details for Policy ID 12345, Division 0009, and Ext. ID 500293428. The member is identified as JOHN SMITH. Under the 'Benefit Selections' section, there are three categories: Medical, Dental, and Life. Each category has a 'Show History' button. The Medical section includes 'AA MEDICAL PACKAGE 1' with a 'Rating Status: Family' and various benefit components like Hospital, Travel, and Health Benefits. The Dental section includes 'AA DENTAL PACKAGE 1' with a 'Rating Status: Family' and '6G Dental'. The Life section includes 'A ALL EMPLOYEES CRITICAL CONDITION' with a 'Rating Status: Family' and a coverage amount of \$50,000.00, 'A ALL EMPLOYEES OPTIONAL SPOUSE LIFE' with a 'Rating Status: Family' and a coverage amount of \$40,000.00, and 'A ALL EMPLOYEES LIFE 1' with a 'Rating Status: Family' and a coverage amount of \$40,000.00. There is also a 'Disability' section with 'A ALL EMPLOYEES DISABILITY 1' and a 'Rating Status: Family' and a coverage amount of \$40,000.00. At the bottom, there is a 'Benefit Summary' button and a navigation bar with buttons for 'Add Coverage Amount', 'Update Coverage Amount', 'Add Package', 'Revise Package', 'Terminate Package', and 'Query'. The browser status bar at the very bottom shows 'Done' and 'Local intr...'.

## Member Selection – Benefits *continued...*

### Update Coverage Amount – Optional Life Benefits Only *continued...*

Once the user has selected Update Coverage Amount from the previous screen, the following is presented. The user can enter a new amount and either backdate the effective date or leave it the same as the date on file. If the effective date is to be greater than the current date on file, the Add Coverage Amount option must be used. Please refer to the previous section on Member Selection – Benefits: Add Coverage Amount.

*Note:* The effective date can be no more than 12 months in the past.

Click Save to process the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The main content area features the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the logo is a navigation menu with tabs for Policies, Members, Products, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, there are buttons for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The Benefits button is selected. The main content area displays the following information:

Policy ID: 12345    Division: 000 9    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group

Ext. ID: 500293428    JOHN SMITH    500293428

**Benefit Selections**

Employee Class: A    Package: ALL EMPLOYEES OPTIONAL SPOUSE LIFE

Coverage Applied For    Eff. Dt.

1 Optional Spouse Life    \$50000    1    Sep    2001

At the bottom of the page, there are "Save" and "Cancel" buttons. The browser's status bar at the very bottom shows "Done" and "Local intranet".

## Member Selection – Benefits *continued...*

### Add Benefits

To add a benefit that is not already in effect for the employee, go to the Member Selection – Benefits tab and click Add Package from the blue navigation bar on the bottom of the screen. This will take the user into a workflow.

The screenshot shows the 'ABCC Enrollment' web application in Microsoft Internet Explorer. The page is titled 'Member Selection – Benefits' and displays the following information:

**Member Information:**  
 Policy ID: 12345 | Division: 000 9 | COMPANY ABC | Owner: ABCC  
 Main Division | Atlantic Regional Group  
 Ext. ID: 500293428 | JOHN SMITH | 500293428

**Benefit Selections:**

| Category | Package Code | Description                        | Rating Status | Eff. Dt.    | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|----------|--------------|------------------------------------|---------------|-------------|-----------------|-----------|------------------|
| Medical  | AA           | MEDICAL PACKAGE 1                  | Family        |             |                 |           |                  |
|          |              | 4 Hospital                         |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |              | F Travel                           |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |              | 1 Extended Health Benefits         |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |              | 5 Drugs                            |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |
| Dental   | AA           | DENTAL PACKAGE 1                   | Family        |             |                 |           |                  |
|          |              | 9 Dental                           |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |
| Life     | A            | ALL EMPLOYEES LIFE                 |               |             |                 |           |                  |
|          |              | 3 Basic Life                       |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |
|          |              | 1 Accidental Death & Dismemberment |               | 01 Oct 2006 | 17 Nov 2006     |           |                  |

**Navigation Bar:** Add Coverage Amount | Update Coverage Amount | Add Package | Revise Package | Terminate Package | Query

## Member Selection – Benefits *continued...*

### Add Benefits *continued...*

Packages is the first tab within the workflow. The user is to select the benefit options, enter the effective date of the change and then click the grey List Available Packages button.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Packages**

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

### Member Add Package - Package Choices

|   |   |
|---|---|
| <b>Health Coverage Options</b><br><input type="checkbox"/> Medical<br><input type="checkbox"/> Dental | <b>Life Coverage Options</b><br><input checked="" type="checkbox"/> Life<br><input type="checkbox"/> Disability |
|---|---|

Effective Date: 1 Dec 2006 [List Available Packages](#)

### Current Employee Classes / Packages

|            |    |  |        |                     |
|------------|----|--|--------|---------------------|
| Medical    | AA | MEDICAL PACKAGE 1<br>4 Hospital<br>F Travel<br>45 Extended Health Benefits<br>10 Drugs | Family | Eff Date: 01Sep2003 |
| Dental     | AA | DENTAL PACKAGE 1<br>6G Dental  | Family | Eff Date: 01Sep2003 |
| Life       | A  | ALL EMPLOYEES LIFE 1<br>3 Basic Life   |        | Eff Date: 01Jun2000 |
|            | A  | ALL EMPLOYEES DEPENDENT LIFE 1<br>3 Dependent Life                                     |        | Eff Date: 01Jul2004 |
|            | A  | ALL EMPLOYEES CRITICAL CONDITION<br>C3 Critical Conditions                             |        | Eff Date: 01May2005 |
| Disability | A  | ALL EMPLOYEES DISABILITY 1<br>3 Short Term Disability                                  |        | Eff Date: 01Mar2000 |

### Available Employee Classes / Packages

[Select a Life Coverage Option](#)

|                                       |   |                              |
|---------------------------------------|---|------------------------------|
| <input checked="" type="radio"/> Life | <input checked="" type="checkbox"/> A - ALL EMPLOYEES OPTIONAL LIFE<br>1 Optional Life    | Optional<br>Amount: \$ 20000 |
|                                       | <input type="checkbox"/> A - ALL EMPLOYEES OPTIONAL SPOUSE LIFE<br>1 Optional Spouse Life | Optional<br>Amount: \$       |

Claim Waiting Period:  Applied  Waived  
Late Applicant:  Yes  No

Continue Cancel Delete

Local intranet

## **Member Selection – Benefits *continued...***

### **Add Benefits *continued...***

From the previous screen, once the grey List Available Packages option is selected those benefits that can be selected based on the criteria entered, are listed. The user is to select the radio button to the left of the benefit being added and then enter any amount if applicable.

In some cases, as per the terms of the contract, the administrator will need to indicate if the applicant is late or not. If Late Applicant is to be flagged with a Yes, then the information should be faxed to the Customer Administration team at Blue Cross so that appropriate steps can be followed by the Medical Underwriting team.

Click Continue to proceed to the next phase of the workflow.

## Member Selection – Benefits *continued...*

### Add Benefits *continued...*

Once the user clicks the Continue button, they are presented with a reminder message to ensure that the Claim Waiting Period and Late Applicant Status have been reviewed. Click OK to continue or Cancel to go back and modify the information.

The screenshot displays the Blue Cross ABCC Enrollment web application. The browser title is "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Member Selection" sub-tab is active, showing a "Packages" section with the following details:

- Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC
- Main Division Atlantic Regional Group
- Ext. ID: 500293428 JOHN SMITH 500293428

Below this is the "Member Add Package - Package Choices" section. It contains two groups of checkboxes:

- Health Coverage Options:**  Medical,  Dental
- Life Coverage:**  Life,  Disability

The "Effective Date" is set to 1 Dec 2006. A "List" button is visible. A "Microsoft Internet Explorer" dialog box is overlaid on the page, containing a question mark icon and the text: "Please verify and apply medical underwriting updates if required. Are you sure you wish to submit this as is?". The dialog has "OK" and "Cancel" buttons.

Below the dialog is the "Current Employee Classes / Packages" section, which lists the following:

| Class   | Code | Description  | Family | Eff Date  |
|---------|------|--|--------|-----------|
| Medical | AA   | MEDICAL PACKAGE 1<br>4 Hospital<br>F Travel<br>45 Extended Health Benefits<br>10 Drugs | Family | 01Sep2003 |
| Dental  | AA   | DENTAL PACKAGE 1<br>6G Dental  | Family | 01Sep2003 |
| Life    | A    | ALL EMPLOYEES LIFE 1<br>3 Basic Life   |        | 01Jun2000 |

At the bottom of the page, there are buttons for "Continue", "Cancel", and "Delete". The browser status bar shows "Done" and "Local Intra".

## Member Selection – Benefits *continued...*

### Add Benefits *continued...*

The second tab of the workflow will present beneficiaries if life coverage is a benefit on the employee's plan. The current information will be presented; the user can update this information if required. Click Continue to proceed.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Packages Beneficiaries

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

#### Member Add Package - Beneficiaries

| Last Name | First Name | Relationship | Percentage | Irrevocable              | Update Id |
|-----------|------------|--------------|------------|--------------------------|-----------|
| Smith     | Jane       | Spouse       | 100        | <input type="checkbox"/> | MEDPA1    |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |

Continue Cancel Delete

Done Local intranet

## Member Selection – Benefits *continued...*

### Add Benefits *continued...*

Member Details is the next tab presented in the workflow. The information on file is presented to the user and can be changed if required.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Packages **Beneficiaries** **Member Details**

Policy ID:  Division:  COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

### Member Add - Member Details

Employment Details

Occupation Category:

Occupation:

Permanent Employment Date:

Save Cancel

Local intranet

## Member Selection – Benefits *continued...*

### Add Benefits *continued...*

Insured details is the next tab presented in the workflow. The current information on file is presented and can be modified if required. Click Continue to proceed.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

 WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties Services

Search General **Member Selection** Coverages Services

Packages **Beneficiaries** Member Details **Insured Details**

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

#### Member Add Package - Insured Details

|            |                  |                 |                 |
|------------|------------------|-----------------|-----------------|
| First Name | Relationship     | Date of Birth   |                 |
| SHAWN M    | Member           | 01Jan1970       |                 |
| Last Name  | Gender           | Privacy Consent |                 |
| SMITH      | Male             | Yes             |                 |
| First Name | Relationship     | Date of Birth   |                 |
| JANE       | Spouse           | 01Jan1970       |                 |
| Last Name  | Gender           | Privacy Consent |                 |
| SMITH      | Female           | Yes             |                 |
|            | Marital Status   | Date            |                 |
| First Name | Relationship     | Date of Birth   |                 |
| JOHNNY     | Child            | 01Jun2005       |                 |
| Last Name  | Dependent Status | Gender          | Privacy Consent |
| SMITH      | Regular          | Male            | Yes             |

Continue Cancel Delete

Done Local intranet

## Member Selection – Benefits *continued...*

### Add Benefits *continued...*

Once all the information has been reviewed and updated, the Confirmation screen is presented. Click Submit to process the changes.

The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross
- Browser Menu Bar:** File, Edit, View, Favorites, Tools, Help
- Browser Navigation:** Back, Forward, Stop, Refresh, Home buttons
- Page Header:** BLUE CROSS logo on the left; WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT on the right.
- Navigation Tabs:** Policies, Members (selected), Parties
- Sub-Navigation:** Search, General, Member Selection (selected), Coverages, Services
- Form Buttons:** Packages, Beneficiaries, Member Details, Insured Details, Confirm (selected)
- Form Fields:**
  - Policy ID:  Division:  9 COMPANY ABC Owner: ABCC
  - Main Division Atlantic Regional Group
  - Ext. ID:  JOHN SMITH 500293428
- Section Header:** Member Add Package - Confirm
- Text:** The collection of the enrollment data for this member has been done. Please select 'submit' to approve the details.
- Form Buttons:** Submit, Delete
- Browser Status Bar:** Done, Local intranet

## Member Selection – Benefits *continued...*

### Revising Benefits

The Revise Package option allows the user to either replace or backdate the existing benefit packages that the employee has. Selecting the Revise Package option will take the user into a workflow.

The screenshot displays the 'ABCC Enrollment' web application in Microsoft Internet Explorer. The page is titled 'Member Selection' and shows details for Policy ID: 00891, Division: 000 2, and Member: SHAWN M QUINLAN. The 'Benefit Selections' section lists three categories: Medical, Dental, and Life. Each category has a 'Show History' button and a radio button for selection. The Medical package includes 4 Hospital, F Travel, 45 Extended Health Benefits, and 10 Drugs. The Dental package includes 6G Dental. The Life package is 'ALL EMPLOYEES CRITICAL CONDITION'. At the bottom, there are buttons for 'Add Coverage Amount', 'Update Coverage Amount', 'Add Package', 'Revise Package', 'Terminate Package', and 'Query'.

| Category | Package Name                       | Rating Status | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|----------|------------------------------------|---------------|-----------|-----------------|-----------|------------------|
| Medical  | AA MEDICAL PACKAGE 1               | Family        |           |                 |           |                  |
|          | 4 Hospital                         |               | 01Sep2003 | 28Aug2003       |           |                  |
|          | F Travel                           |               | 01Sep2003 | 28Aug2003       |           |                  |
|          | 45 Extended Health Benefits        |               | 01Sep2003 | 28Aug2003       |           |                  |
|          | 10 Drugs                           |               | 01Sep2003 | 28Aug2003       |           |                  |
| Dental   | AA DENTAL PACKAGE 1                | Family        |           |                 |           |                  |
|          | 6G Dental                          |               | 01Sep2003 | 28Aug2003       |           |                  |
| Life     | A ALL EMPLOYEES CRITICAL CONDITION |               |           |                 |           |                  |

## Member Selection – Benefits *continued...*

### Revising Benefits *continued....*

To revise the package, select the package options from the boxes entitled Health Coverage Options and Life Coverage Options (where applicable). Enter the effective date and then click the grey Replace button.

Click Continue to proceed into the workflow.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. A navigation menu below the header has tabs for Policies, Members, and Parties, with "Members" selected. Under "Members", there are sub-tabs for Search, General, Member Selection, Coverages, and Services, with "Member Selection" selected. The main content area is titled "Packages" and displays member information: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, and 500293428. Below this is the "Member Package Revision - Package Choices" section, which contains two boxes: "Health Coverage Options" with checkboxes for Medical and Dental, and "Life Coverage Options" with checkboxes for Life and Disability. The "Health Care Province" is set to NB. The "Effective Date" is set to 1 Oct 2006. There are "Backdate" and "Replace" buttons. At the bottom of the page, there are "Continue", "Cancel", and "Delete" buttons. The browser's status bar at the bottom right shows "Local intr".

## Member Selection – Benefits *continued...*

### Revising Benefits *continued....*

Once the user has clicked the grey Replace button, the employee's current benefit packages are listed and then all available packages for the date selected are listed. Select the appropriate package as well as the rating status. If one of the options is to be waived, click the box to the left of Waive Reason and then select the appropriate reason from the dropdown menu.

Click Continue to proceed into the workflow.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties, with sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Member Selection" sub-tab is active, and the "Packages" section is expanded.

Member Information:

- Policy ID: 12345 | Division: 0009 | COMPANY ABC | Owner: ABCC
- Main Division | Atlantic Regional Group
- Ext. ID: 500293428 | JOHN SMITH | 500293428

**Member Package Revision - Package Choices**

Health Coverage Options:

- Medical
- Dental

Life Coverage Options:

- Life
- Disability

Health Care Province: NB

Effective Date: 1 Oct 2006

Buttons: [Backdate](#), [Replace](#)

**Current Employee Classes / Packages**

|         |                                       |        |                     |
|---------|---------------------------------------|--------|---------------------|
| Medical | AA HEALTH A (FAMILY)                  | Family | Eff Date: 01Jan2002 |
|         | F Travel                              |        |                     |
|         | TB Extended Health Benefits           |        |                     |
|         | PX Drugs                              |        |                     |
| Dental  | AA DENTAL A                           | Family | Eff Date: 01Jan2002 |
|         | XR Dental                             |        |                     |
| Life    | A ALL EMPLOYEES CRITICAL CONDITIONS 1 |        | Eff Date: 01Jan2005 |
|         | C8 Critical Conditions                |        |                     |

**Available Employee Classes / Packages**

Select a Health Coverage Option

If packages having rating status's marked with a \* they must have the same value

|                               |                             |           |                                 |                           |
|-------------------------------|-----------------------------|-----------|---------------------------------|---------------------------|
| <input type="radio"/> Medical | AA - HEALTH B (FAMILY)      | Mandatory | Health Care Province: NB        | Rating Status: [dropdown] |
|                               | SP Hospital                 |           | Waive: <input type="checkbox"/> | Waive Reason: [dropdown]  |
|                               | TD Extended Health Benefits |           |                                 |                           |
|                               | PX Drugs                    |           |                                 |                           |
|                               | F Travel                    |           |                                 |                           |
| <input type="radio"/> Dental  | AA - DENTAL C               | Mandatory | Health Care Province: NB        | Rating Status: [dropdown] |
|                               | XT Dental                   |           | Waive: <input type="checkbox"/> | Waive Reason: [dropdown]  |

Buttons: [Continue](#), [Cancel](#), [Delete](#)

## Member Selection – Benefits *continued...*

### Revising Benefits *continued....*

Once the packages have been chosen, the user is taken to the Insured Details tab where current information is displayed. Additional insureds can be added at this point by selecting the grey More Insureds button. If changes are required to current information on file, please refer to the section entitled Member Selections – Insureds: Modifying Insured Details.

Click Continue to proceed.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties Services

Search General **Member Selection** Coverages Services

**Packages** Insured Details

Policy ID: 12345 Division 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

#### Member Package Revision - Insured Details

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JOHN       | Member       | 01Jan2006     |

| Last Name | Gender | Privacy Consent |
|-----------|--------|-----------------|
| SMITH     | Male   | Yes             |

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JANE       | Spouse       | 01Jan1970     |

| Last Name | Gender | Privacy Consent |
|-----------|--------|-----------------|
| SMITH     | Female | Yes             |

|  | Marital Status | Date |
|--|----------------|------|
|  |                |      |

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JOHNNY     | Child        | 01Jun2005     |

| Last Name | Dependent Status | Gender | Privacy Consent |
|-----------|------------------|--------|-----------------|
| SMITH     | Regular          | Male   | Yes             |

[More Insureds](#)

Continue Cancel Delete

Done Local Intra

## Member Selection – Benefits *continued...*

### Revising Benefits *continued....*

Once the information has been entered, the confirmation screen is presented. Click Submit to process the changes.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Policies **Insured Details** Confirm

Policy ID: 12345 Division 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

Member Package Revision - Confirm

The collection of the enrollment data for this member has been done.  
Please select 'submit' to approve the details.

Submit Delete

Done Local intr

## Member Selection – Benefits *continued...*

### Backdating Benefits

The Revise Package option allows the user to either replace or backdate the existing benefit packages that the employee has. Selecting the Revise Package option will take the user into a workflow.

The screenshot displays the 'ABCC Enrollment' web application in Microsoft Internet Explorer. The page is titled 'Member Selection' and shows details for a member with Policy ID 00891 and Ext. ID 050211176. The member's name is SHAWN M QUINLAN, and the owner is ABCC. The system lists three benefit categories: Medical, Dental, and Life. Each category has a 'Show History' button and a list of available packages with their respective effective and termination dates. At the bottom, there are several action buttons: 'Add Coverage Amount', 'Update Coverage Amount', 'Add Package', 'Revise Package', 'Terminate Package', and 'Query'.

Policy ID: 00891 Division: 000 2 SKILLSOFT Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 050211176 SHAWN M QUINLAN 050211176

#### Benefit Selections

**Medical** [Show History](#)

|   | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|---|-----------|-----------------|-----------|------------------|
| <input type="radio"/> AA MEDICAL PACKAGE 1<br>Rating Status: Family |           |                 |           |                  |
| 4 Hospital  | 01Sep2003 | 28Aug2003       |           |                  |
| F Travel  | 01Sep2003 | 28Aug2003       |           |                  |
| 45 Extended Health Benefits   | 01Sep2003 | 28Aug2003       |           |                  |
| 10 Drugs  | 01Sep2003 | 28Aug2003       |           |                  |

**Dental** [Show History](#)

|  | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|--|-----------|-----------------|-----------|------------------|
| <input type="radio"/> AA DENTAL PACKAGE 1<br>Rating Status: Family |           |                 |           |                  |
| 6G Dental  | 01Sep2003 | 28Aug2003       |           |                  |

**Life** [Show History](#)

|  | Eff. Dt. | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|--|----------|-----------------|-----------|------------------|
| <input type="radio"/> A ALL EMPLOYEES CRITICAL CONDITION<br>Coverage Applied For |          |                 |           |                  |

[Add Coverage Amount](#) [Update Coverage Amount](#) [Add Package](#) [Revise Package](#) [Terminate Package](#) [Query](#)



## Member Selection – Benefits *continued...*

### Backdating Benefits *continued...*

If the date entered is prior to the effective date of the plan itself, the following error will be presented. Click OK to continue.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page content includes the Blue Cross logo and navigation links (WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT). A navigation menu has tabs for Policies, Members, and Parties, with sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Member Selection" sub-tab is active, showing a "Packages" section with the following details:

|                    |                 |               |                         |
|--------------------|-----------------|---------------|-------------------------|
| Policy ID: 12345   | Division: 000 9 | COMPANY ABC   | Owner: ABCC             |
|                    |                 | Main Division | Atlantic Regional Group |
| Ext. ID: 500293428 | JOHN SMITH      |               | 500293428               |

Below this is a "Member Package Revision - Package Choices" section. It includes a "Health Coverage Options" box with checked boxes for "Medical" and "Dental". The "Health Care Province" is set to "NB". The "Effective Date" is set to "10 Oct 2006". There are "Backdate" and "Replace" buttons. An error message dialog box is overlaid on the page, titled "Microsoft Internet Explorer", with the text: "The Effective Date entered is prior to, 2006-10-31, the member's policy join date. The member will be backdated. Are you sure you wish to submit this as is?". The dialog has "OK" and "Cancel" buttons. At the bottom of the page, there are "Continue", "Cancel", and "Delete" buttons. The browser's status bar shows "Done" and "Local intr...".

## Member Selection – Benefits *continued...*

### Backdating Benefits *continued...*

Once the user has clicked OK from the warning message on the previous screen, the current package and available packages are presented. Select the appropriate package and click Continue to proceed.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

 WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Packages**

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

#### Member Package Revision - Package Choices

Health Coverage Options

Medical

Dental

Life Coverage Options

Life

Disability

Health Care Province: NB

Effective Date: 10 Oct 2006

#### Current Employee Classes / Packages

|         |    |                                    |        |                     |
|---------|----|------------------------------------|--------|---------------------|
| Medical | AA | MEDICAL PACKAGE 1                  | Family | Eff Date: 31Oct2006 |
|         |    | 4 Hospital                         |        |                     |
|         |    | F Travel                           |        |                     |
|         |    | 1 Extended Health Benefits         |        |                     |
|         |    | 5 Drugs                            |        |                     |
| Dental  | AA | DENTAL PACKAGE 1                   | Family | Eff Date: 31Oct2006 |
|         |    | 9 Dental                           |        |                     |
| Life    | A  | ALL EMPLOYEES LIFE                 |        | Eff Date: 31Oct2006 |
|         |    | 3 Basic Life                       |        |                     |
|         |    | 1 Accidental Death & Dismemberment |        |                     |

#### Available Employee Classes / Packages

Select a Health Coverage Option

|   |         |                            |           |                          |                       |
|---|---------|----------------------------|-----------|--------------------------|-----------------------|
| ○ | Medical | AA - MEDICAL PACKAGE 1     | Mandatory | Health Care Province: NB | Rating Status: Family |
|   |         | 4 Hospital                 |           |                          |                       |
|   |         | F Travel                   |           |                          |                       |
|   |         | 1 Extended Health Benefits |           |                          |                       |
|   |         | 5 Drugs                    |           |                          |                       |
|   | Dental  | AA - DENTAL PACKAGE 1      | Mandatory | Health Care Province: NB | Rating Status: Family |
|   |         | 9 Dental                   |           |                          |                       |

Continue Cancel Delete

Local Intra

## Member Selection – Benefits *continued...*

### Backdating Benefits *continued...*

Once the packages have been chosen, the user is taken to the Insured Details tab where current information is displayed. Additional insured can be added at this point by selecting the grey More Insureds button. If changes are required to current information on file, please refer to the section entitled Member Selections – Insureds: Modifying Insured Details. Click Continue to proceed.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, Parties, and Services. Below this is a sub-navigation bar with Search, General, Member Selection, Coverages, and Services. The "Member Selection" tab is active, and within it, the "Insured Details" sub-tab is selected. The page displays the following information:

Policy ID: 12345    Division 0009    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group

Ext. ID: 500293428    JOHN SMITH    500293428

#### Member Package Revision - Insured Details

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JOHN       | Member       | 01Jan2006     |

| Last Name | Gender | Privacy Consent |
|-----------|--------|-----------------|
| SMITH     | Male   | Yes             |

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JANE       | Spouse       | 01Jan1970     |

| Last Name | Gender | Privacy Consent |
|-----------|--------|-----------------|
| SMITH     | Female | Yes             |

Marital Status    Date

| First Name | Relationship | Date of Birth |
|------------|--------------|---------------|
| JOHNNY     | Child        | 01Jun2005     |

| Last Name | Dependent Status | Gender | Privacy Consent |
|-----------|------------------|--------|-----------------|
| SMITH     | Regular          | Male   | Yes             |

[More Insureds](#)

Continue    Cancel    Delete

Done    Local Intra

## Member Selection – Benefits *continued...*

### Backdating Benefits *continued...*

Once the information has been entered, the confirmation screen is presented.

Click Submit to process the changes.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Packages **Insured Details** Confirm

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

### Member Package Revision - Confirm

The collection of the enrollment data for this member has been done.  
Please select 'submit' to approve the details.

Submit Delete

Done Local Intra

## Member Selection – Benefits *continued...*

### Terminating Benefits

To terminate a benefit package, click the radio button to the left of the benefit being terminated and then click Terminate Package from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser address bar shows "File Edit View Favorites Tools Help". The Blue Cross logo is visible in the top left, and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT" are in the top right.

The main navigation bar includes "Policies", "Members", and "Parties". Under "Members", there are sub-tabs for "General", "Member Selection", "Coverages", and "Services". The "Member Selection" sub-tab is active, and it contains further sub-tabs: "Insureds", "Benefits", "Co-ordination of Benefits", "Beneficiaries", and "HSA".

Member information is displayed as follows:

- Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC
- Main Division Atlantic Regional Group
- Ext. ID: 500293428 JOHN SMITH 500293428

The "Benefit Selections" section lists the following options:

- AA MEDICAL PACKAGE 1
  - Rating Status: Family
  - 4 Hospital (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)
  - F Travel (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)
  - 1 Extended Health Benefits (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)
  - 5 Drugs (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)
- AA DENTAL PACKAGE 1
  - Rating Status: Family
  - 9 Dental (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)
- A ALL EMPLOYEES LIFE
  - 3 Basic Life (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)
  - 1 Accidental Death & Dismemberment (Eff. Dt. 01Oct2006, Eff. Trans. Dt. 17Nov2006)

At the bottom of the page, a blue navigation bar contains the following buttons: "Add Coverage Amount", "Update Coverage Amount", "Add Package", "Revise Package", "Terminate Package", and "Query". The "Terminate Package" button is highlighted. The browser status bar at the very bottom shows "Done" and "Local Intra".

## Member Selection – Benefits *continued...*

### Terminating Benefits *continued...*

Once Terminate Package has been selected from the previous screen, the user will be able to enter the termination date by selecting the information from the dropdown boxes.

Click Save to process the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page header features the Blue Cross logo and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT".

The main navigation area includes tabs for "Policies", "Members", "Products", and "Parties". Under the "Members" tab, there are sub-tabs for "Search", "General", "Member Selection", "Coverages", and "Services". The "Member Selection" sub-tab is active, and within it, there are buttons for "Insureds", "Benefits", "Co-ordination of Benefits", "Beneficiaries", and "HSA".

Below the navigation, the following information is displayed:

Policy ID: 12345    Division: 000 9    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group  
Ext. ID: 500293428    JOHN SMITH    500293428

**Benefit Selections**

Employee Class: AA    Package: MEDICAL PACKAGE 1  
Rating Status: Family    Term. Dt.: 30 Nov 2006

| Coverage Applied For       | Eff. Dt.  |
|----------------------------|-----------|
| 4 Hospital                 | 01Oct2006 |
| F Travel                   | 01Oct2006 |
| 1 Extended Health Benefits | 01Oct2006 |
| 5 Drugs                    | 01Oct2006 |

At the bottom of the page, there are "Save" and "Cancel" buttons. The browser's status bar shows "Done" and "Local Intra".

## Member Selection – Benefits *continued...*

### Terminating Benefits *continued...*

When the information has been saved from the previous screen, a warning box appears reconfirming the date that was entered. Click OK if the information is correct.

*Note:* The termination date cannot be more than 31 days in the past. For terminations that are more than 31 days in the past, please fax the request to the Customer Administration team at Blue Cross for manual processing.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar shows the URL: `http://appstrn.atl.bluecross.ca/es/Unif/Console/uv3design/es/en/members/selections/u_...html?RESULT_ID=es/en/`. The page content includes a navigation menu with tabs for "Policies", "Members", "Products", and "Parties". Under "Members", there are sub-tabs for "General", "Member Selection", "Coverages", and "Services". The "Member Selection" sub-tab is active, and within it, the "Benefits" sub-tab is selected. The main content area displays member information: Policy ID: 12345, Division: 000 9, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. Below this, the "Benefit Selections" section shows "Employee Class: AA", "Package: MEDICAL", "Rating Status: Family", and "Term. Dt.: 30". A "Coverage Applied" section lists: 4 Hospital, F Travel, 1 Extended Health Benefits, and 5 Drugs. A "Microsoft Internet Explorer" dialog box is overlaid on the page, containing a question mark icon and the text: "The Package is being terminated as of 2006-11-30 - Do you wish to proceed? Are you sure you wish to submit this as is?". The dialog box has "OK" and "Cancel" buttons. At the bottom of the page, there are "Save" and "Cancel" buttons. The browser's status bar at the bottom right shows "Local intr".

## Member Selection – Benefits *continued...*

### Benefits Summary

To view a summarized version of changes to the benefit packages, the user can click the grey Benefits Summary button at the bottom of the Benefits screen.

The screenshot displays the 'ABCC Enrollment' web application in Internet Explorer. The page title is 'ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross'. The browser's address bar shows the URL 'http://www.abcc.com/ABCC/MemberSelection.aspx?PolicyID=12345&Division=0009&MemberID=500293428'. The page features a navigation menu with tabs for 'Policies', 'Members', and 'Parties'. Under 'Members', there are sub-tabs for 'General', 'Member Selection', 'Coverages', and 'Services'. The 'Member Selection' sub-tab is active, showing a list of benefit options for 'Policy ID: 12345' and 'Member ID: 500293428'. The member's name is 'JOHN SMITH' and the company is 'COMPANY ABC'. The interface includes a 'Benefit Summary' button at the bottom of the list. At the very bottom of the page, there is a toolbar with buttons for 'Add Coverage Amount', 'Update Coverage Amount', 'Add Package', 'Revise Package', 'Terminate Package', and 'Query'. The browser's status bar shows 'Done' and 'Local intranet'.

| Policy ID | Division | Company       | Owner                   |
|-----------|----------|---------------|-------------------------|
| 12345     | 000 9    | COMPANY ABC   | ABCC                    |
|           |          | Main Division | Atlantic Regional Group |

| Ext. ID   | Member Name | Member ID |
|-----------|-------------|-----------|
| 500293428 | JOHN SMITH  | 500293428 |

| Rating Status           | Benefit Description                | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|-------------------------|------------------------------------|-----------|-----------------|-----------|------------------|
| Family                  | 9 Dental                           | 01Oct2006 | 17Nov2006       |           |                  |
| Life                    |                                    |           |                 |           |                  |
| <input type="radio"/> A | ALL EMPLOYEES LIFE                 | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|                         | 3 Basic Life                       | 01Oct2006 | 17Nov2006       |           |                  |
|                         | 1 Accidental Death & Dismemberment | 01Oct2006 | 17Nov2006       |           |                  |
| <input type="radio"/> A | ALL EMPLOYEES CRITICAL CONDITIONS  | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|                         | Rating Status: Family              |           |                 |           |                  |
|                         | C3 Critical Conditions             | 01Oct2006 | 17Nov2006       |           |                  |
|                         | Disability                         |           |                 |           |                  |
| <input type="radio"/> A | ALL EMPLOYEES DISABILITY           | Eff. Dt.  | Eff. Trans. Dt. | Term. Dt. | Term. Trans. Dt. |
|                         | 3 Short Term Disability            | 01Oct2006 | 17Nov2006       |           |                  |
|                         | 30 Long Term Disability            | 01Oct2006 | 17Nov2006       |           |                  |

**Benefit Summary**

[Add Coverage Amount](#)
[Update Coverage Amount](#)
[Add Package](#)
[Revise Package](#)
[Terminate Package](#)
[Query](#)

## Member Selection – Benefits *continued...*

### Benefits Summary *continued...*

Once the grey Benefits Summary button has been selected, the benefit information will be presented in the format below. This summarizes the effective, termination and transfer dates by line of benefit so the user can easily view the history on the benefits.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Insureds **Benefits** Co-ordination of Benefits Beneficiaries HSA

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

|           |                          | Eff.Dt.     | Eff.Trans.Dt. | Term.Dt. | Term.Trans.Dt. |
|-----------|--------------------------|-------------|---------------|----------|----------------|
| 12345-000 | Family                   | 01 Oct 2006 | 17 Nov 2006   |          |                |
| 4         | Hospital                 | 01 Oct 2006 | 17 Nov 2006   |          |                |
| F         | Travel                   | 01 Oct 2006 | 17 Nov 2006   |          |                |
| 1         | Extended Health Benefits | 01 Oct 2006 | 17 Nov 2006   |          |                |
| 5         | Drugs                    | 01 Oct 2006 | 17 Nov 2006   |          |                |
| 9         | Dental                   | 01 Oct 2006 | 17 Nov 2006   |          |                |

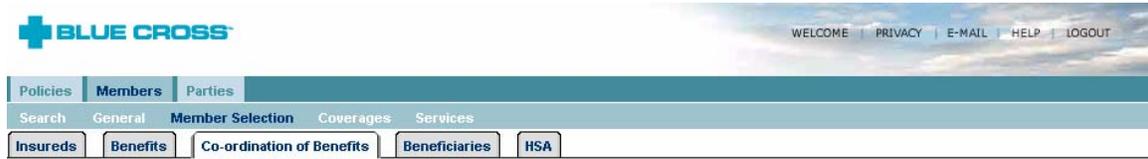
Life/Disability

|           |                                  | Eff.Dt.     | Eff.Trans.Dt. | Term.Dt. | Term.Trans.Dt. |
|-----------|----------------------------------|-------------|---------------|----------|----------------|
| 12345-000 | Class: A                         | 01 Oct 2006 | 17 Nov 2006   |          |                |
|           | Basic Life                       | 01 Oct 2006 | 17 Nov 2006   |          |                |
|           | Plan: 3                          | 01 Oct 2006 | 16 Nov 2006   |          |                |
|           | Accidental Death & Dismemberment | 01 Oct 2006 | 17 Nov 2006   |          |                |
|           | Plan: 1                          | 01 Oct 2006 | 16 Nov 2006   |          |                |
|           | Critical Conditions              | 01 Oct 2006 | 17 Nov 2006   |          |                |
|           | Plan: C3                         | 01 Oct 2006 | 16 Nov 2006   |          |                |
|           | Short Term Disability            | 01 Oct 2006 | 17 Nov 2006   |          |                |
|           | Plan: 3                          | 01 Oct 2006 | 16 Nov 2006   |          |                |
|           | Long Term Disability             | 01 Oct 2006 | 17 Nov 2006   |          |                |
|           | Plan: 30                         | 01 Oct 2006 | 16 Nov 2006   |          |                |

Return

Done Local intr

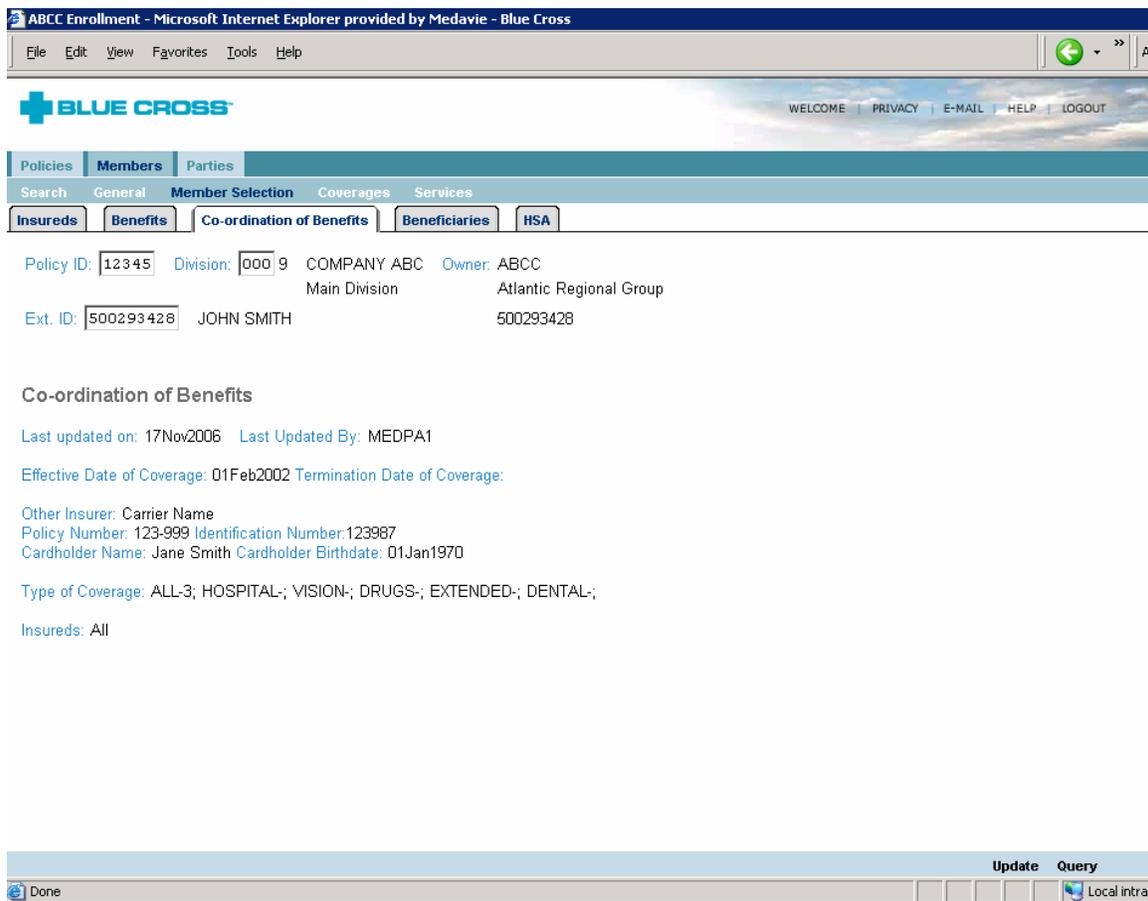
## Member Selection – Co-ordination of Benefits



Within the Member Selection – Co-ordination of Benefits tab, the user will be able to

- Add/Update the Co-ordination of benefits information

*Note: Users with inquiry only access will only be able to view the above information.*



## Member Selection – Co-ordination of Benefits *continued....*

### Co-ordination of Benefits

To view the current Co-ordination of Benefits information, the user must go to the Member Selection – Co-ordination of Benefits tab. To change the information, click Update in the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header features the Blue Cross logo on the left and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT on the right. Below the header is a navigation menu with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, there are further sub-tabs for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The Co-ordination of Benefits sub-tab is selected, displaying the following information:

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

**Co-ordination of Benefits**

Last updated on: 17Nov2006 Last Updated By: MEDPA1

Effective Date of Coverage: 01Feb2002 Termination Date of Coverage:

Other Insurer: Carrier Name  
Policy Number: 123-999 Identification Number: 123987  
Cardholder Name: Jane Smith Cardholder Birthdate: 01Jan1970

Type of Coverage: ALL-3; HOSPITAL-; VISION-; DRUGS-; EXTENDED-; DENTAL-;

Insureds: All

At the bottom of the page, there is a blue navigation bar with "Update" and "Query" buttons. The browser's status bar at the very bottom shows "Done" and "Local intranet".

## Member Selection – Co-ordination of Benefits *continued...*

### Co-ordination of Benefits *continued...*

Once the user has selected the Update button from the previous screen, the fields become editable and the user can enter the appropriate changes. If the co-ordination of benefits is no longer in effect, then the user would enter a termination date in the Coverage Termination Date field.

All fields must be completed. If not all information is available, the user can enter the wording "unknown". Completing as much information as possible in this screen is to the benefit of the group and the subscriber.

Co-ordination of Benefit information is applicable only to Health and Dental benefits. If the member has Life benefits only, ie they do not have Health and/or Dental benefits, thus the Co-ordination of Benefit information is not required.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Insureds** Benefits **Co-ordination of Benefits** Beneficiaries HSA

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

### Co-ordination of Benefits

Coverage Effective Date: 1 Feb 2002 Coverage Termination Date: Day Month Year

Other Insurer

Name of Insurer: Carrier Name

Policy Number: 123-999 Identification#: 123987

Cardholder of 'Other' Coverage: Jane Smith Date of Birth: 1 Jan 1970

Type of Coverage

All: Vision: Hospital: Drugs: Extended Health Benefits: Dental:

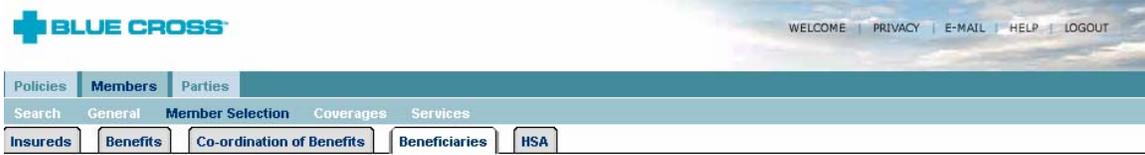
Insureds

All  
 Spouse  
 List Specific Insureds

Save Cancel

Local Intra

## Member Selection - Beneficiaries



Within the Member Selection – Beneficiaries tab, the user will be able to

- Add/Update the beneficiary information

*Note: Users with inquiry only access will only be able to view the above information.*

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Insureds **Benefits** Co-ordination of Benefits **Beneficiaries** HSA

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Beneficiaries**

| Name       | Relationship | Percentage | Irrevocable | Update Id | Update Date |
|------------|--------------|------------|-------------|-----------|-------------|
| Jane Smith | Spouse       | 100        | No          | MEDPA1    | 17Nov2006   |

Update Query

Local Intra

## Member Selection – Beneficiaries *continued....*

### Beneficiaries

To view or make changes to beneficiary information, the user would select the Member Selection-Beneficiaries tab. To make changes, select Update from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The website header features the Blue Cross logo on the left and navigation links for "WELCOME", "PRIVACY", "E-MAIL", "HELP", and "LOGOUT" on the right. Below the header is a navigation menu with tabs for "Policies", "Members", and "Parties". Under "Members", there are sub-tabs for "Search", "General", "Member Selection", "Coverages", and "Services". The "Member Selection" sub-tab is active, and within it, the "Beneficiaries" tab is selected. The main content area displays the following information:

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Beneficiaries**

| Name       | Relationship | Percentage | Irrevocable | Update Id | Update Date |
|------------|--------------|------------|-------------|-----------|-------------|
| Jane Smith | Spouse       | 100        | No          | MEDPA1    | 17Nov2006   |

At the bottom right of the page, there are two buttons: "Update" and "Query". The browser's status bar at the very bottom shows "Local Intra".

## Member Selection – Beneficiaries *continued....*

### Beneficiaries *continued....*

Once Update has been selected, the user can make changes to the Beneficiary information.

### Multiple Beneficiaries

If there are multiple beneficiaries, the percentages must add up to 100%. The percentages must be assigned as whole values. For example, if the employee has three beneficiaries listed and wants the benefit to be equally paid, the user would enter 33%, 33% and 34%.

### Irrevocable Beneficiaries

This option would only be selected in the case where the beneficiary may not be terminated by the insured without the beneficiary's consent. Please refer to the contract for further information.

Click Save to submit the changes.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Insureds **Beneficiaries** Co-ordination of Benefits HSA

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

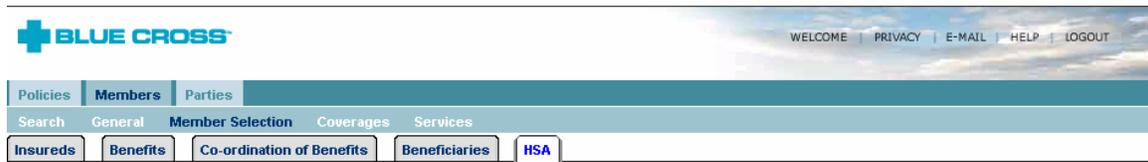
Update Beneficiary

| Last Name | First Name | Relationship | Percentage | Irrevocable              | Update Id |
|-----------|------------|--------------|------------|--------------------------|-----------|
| Smith     | Jane       | Spouse       | 100        | <input type="checkbox"/> | MEDPA1    |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |
|           |            |              |            | <input type="checkbox"/> |           |

Save Cancel

Done Local Intra

## Member Selection - HSA



Within the Member Selection – Health Spending Account (HSA) tab, the user will be able to

- Add HSA information
- Update/Terminate HSA information
- View HSA information

*Note: Users with inquiry only access will only be able to view the above information.*

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies | **Members** | Parties

Search | General | **Member Selection** | Coverages | Services

Insureds | Benefits | Co-ordination of Benefits | Beneficiaries | **HSA**

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

**Health Spending Account**

| Contribution Year:         | Current Balance: | Effective Date: | Term Date: | Forfeit Date: |
|----------------------------|------------------|-----------------|------------|---------------|
| <input type="radio"/> 2005 | 12               | 01Mar2005       | 31Dec2005  | 28Feb2006     |
| <input type="radio"/> 2006 | 12               | 01Jan2006       | 31Dec2006  | 28Feb2007     |

Add Update Query Delete

Done Local intranet

## Member Selection - HSA *continued...*

### Add Health Spending Account (HSA)

To add HSA information for the new year, the user would select the Member Selection – HSA tab and click Add from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page content includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Below this is a sub-navigation bar with Search, General, Member Selection, Coverages, and Services. A secondary bar contains tabs for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The HSA tab is active, displaying member information: Policy ID: 12345, Division: 0009, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. Below this is a section titled "Health Spending Account" with a table of contribution years and balances.

| Contribution Year:         | Current Balance: | Effective Date: | Term Date: | Forfeit Date: |
|----------------------------|------------------|-----------------|------------|---------------|
| <input type="radio"/> 2005 | 12               | 01Mar2005       | 31Dec2005  | 28Feb2006     |
| <input type="radio"/> 2006 | 12               | 01Jan2006       | 31Dec2006  | 28Feb2007     |

At the bottom of the page, there is a blue navigation bar with buttons for Add, Update, Query, and Delete. The browser's status bar at the very bottom shows "Done" and "Local intranet".

## Member Selection - HSA *continued...*

### Add Health Spending Account (HSA) *continued...*

To add HSA for the new year, enter the contribution year, the deposit amount for the year and the effective date of the deposit. The effective date cannot be before the effective date of the benefits.

Click Save to process the changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, the HSA sub-tab is selected. The page displays member information: Policy ID: 12345, Division: 000 9, COMPANY ABC, Owner: ABCC, Main Division, Atlantic Regional Group, Ext. ID: 500293428, JOHN SMITH, 500293428. Below this is the "Health Spending Account" section with input fields for Contribution Year (2007), Yearly Deposit (1500), and Effective Date (1 Jan 2007). At the bottom right of the form area are "Save" and "Cancel" buttons. The browser's status bar at the bottom shows "Done" and "Local intranet".

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

**Insureds** Benefits Co-ordination of Benefits Beneficiaries **HSA**

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

**Health Spending Account**

Contribution Year: 2007  
Yearly Deposit: 1500  
Effective Date: 1 Jan 2007

Save Cancel

Done Local intranet

## Member Selection - HSA *continued...*

### Update Health Spending Account (HSA)

To update existing HSA information, click the radio button to the left of the appropriate year and then click Update from the blue navigation bar on the bottom of the screen.

The screenshot shows a web browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation bar has tabs for Policies, Members, and Parties. Under Members, there are sub-tabs: Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, there are buttons for Insureds, Benefits, Co-ordination of Benefits, Beneficiaries, and HSA. The HSA button is selected.

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

#### Health Spending Account

| Contribution Year:                    | Current Balance: | Effective Date: | Term Date: | Forfeit Date: |
|---------------------------------------|------------------|-----------------|------------|---------------|
| <input type="radio"/> 2005            | 12               | 01Mar2005       | 31Dec2005  | 28Feb2006     |
| <input checked="" type="radio"/> 2006 | 12               | 01Jan2006       | 31Dec2006  | 28Feb2007     |

At the bottom of the page, there is a blue navigation bar with buttons: Add, Update, Query, Delete. Below this bar, the browser's status bar shows "Done" and a local intranet icon.

## Member Selection - HSA *continued...*

### Update Health Spending Account (HSA) *continued....*

Once Update has been selected from the previous screen, the user is able to change the information for the HSA for the contribution year selected. Please ensure when the dates and amounts are altered that the terms of the contract are being followed. Click Save to process changes.

#### HSA Effective Date:

The effective date of HSA would be either the start date of the contribution year or the date in which the employee's benefits went into effect, if they became eligible for benefits during the current contribution year.

#### HSA Term Date:

The term date would be a standard date entered since the HSA would be termed for the same time of year for all employees. If the employee leaves employment the termination date for HSA, in most cases, should equal the termination date of benefits. Please refer to the contract for details.

#### HSA Forfeit Date:

If the HSA is not used by the Forfeit Date, the employee loses the remaining amount in the HSA. This date is typically 30, 60 or 90 days from the Term Date. Please refer to the contract for details.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General **Member Selection** Coverages Services

Insureds **Benefits** Co-ordination of Benefits Beneficiaries **HSA**

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

#### Health Spending Account

Contribution Year: 2006

Yearly Deposit: 12

Effective Date: 1 Jan 2006

Term Date: 31 Dec 2006

Forfeit Date: 28 Feb 2007

Save Cancel Delete

Done Local intr:

## Member Selection - HSA *continued...*

### Delete Health Spending Account (HSA)

The user can select the radio button to the left of a contribution year and then click Delete to remove the information entirely. It is not recommended for this option to be used. It is preferable to use the Update function as outlined in the previous section.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Under Members, there are sub-tabs: Search, General, Member Selection, Coverages, and Services. The Member Selection sub-tab is active, and within it, the HSA sub-tab is selected.

Member Information:

Policy ID: 12345 Division: 0009 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

Health Spending Account

| Contribution Year:                    | Current Balance: | Effective Date: | Te |
|---------------------------------------|------------------|-----------------|----|
| <input type="radio"/> 2005            | 12               | 01Mar2005       | 31 |
| <input checked="" type="radio"/> 2006 | 12               | 01Jan2006       | 31 |

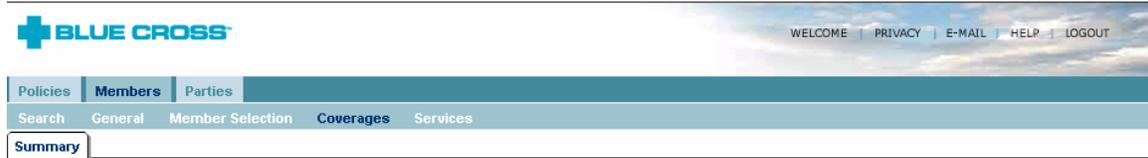
A Microsoft Internet Explorer dialog box is overlaid on the table, containing the following text:

Are you sure you want to delete?  
Are you sure you wish to submit this as is?

Buttons: OK, Cancel

At the bottom of the page, there are buttons for Add, Update, Query, and Delete. The URL in the address bar is: https://www.atl.bluecross.ca/es/Unifi/Console/uv3design/es/en/members/selections/u...html?RESULT\_ID=es/en/members/

## Coverages - Summary



Within the Coverages - Summary tab, the user will be able to

- View current, past and future benefits

*Note: Users with inquiry only access will only be able to view the above information.*

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection **Coverages** Services

**Summary**

Policy ID:  Division:  COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

Coverage Summary Date:    [Benefit Descriptions](#)

Policy ID: 12345 Division: 000

\* represents benefit limitations

|                                  | JOHN SMITH | JOHNNY SMITH<br>(child) | JANE SMITH<br>(spouse) |
|----------------------------------|------------|-------------------------|------------------------|
| Hospital                         | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Travel                           | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Extended Health Benefits         | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Drugs                            | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Dental                           | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Basic Life                       | 01Oct2006  |                         |                        |
| Accidental Death & Dismemberment | 01Oct2006  |                         |                        |
| Critical Conditions              | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Short Term Disability            | 01Oct2006  |                         |                        |
| Long Term Disability             | 01Oct2006  |                         |                        |

Done Query Local intr

## Coverages – Summary *continued...*

### Coverage Summary

To view a summary of benefits available to the employee, select the Coverages – Summary tab. The date is defaulted to the current day but a search can be done to view past and future dates by selecting the date required and then selecting Query from the blue navigation bar on the bottom of the screen. To determine the volume of coverage available, click the grey Benefit Descriptions button to the right of the date field.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The website header includes the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. A secondary navigation bar contains tabs for Policies, Members, and Parties, with sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Summary" sub-tab is selected.

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
 Main Division Atlantic Regional Group  
 Ext. ID:  JOHN SMITH 500293428

Coverage Summary Date:    [Benefit Descriptions](#)  
 Policy ID: 12345 Division: 000

\* represents benefit limitations

|                                  | JOHN SMITH | JOHNNY SMITH<br>(child) | JANE SMITH<br>(spouse) |
|----------------------------------|------------|-------------------------|------------------------|
| Hospital                         | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Travel                           | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Extended Health Benefits         | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Drugs                            | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Dental                           | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Basic Life                       | 01Oct2006  |                         |                        |
| Accidental Death & Dismemberment | 01Oct2006  |                         |                        |
| Critical Conditions              | 01Oct2006  | 01Oct2006               | 01Oct2006              |
| Short Term Disability            | 01Oct2006  |                         |                        |
| Long Term Disability             | 01Oct2006  |                         |                        |

At the bottom of the page, there is a "Query" button and a status bar showing "Done" and "Local intr..."

## Coverages – Summary *continued...*

### Benefit Descriptions

Once the user has selected the grey Benefit Descriptions button, the following screen will be presented. In the section for Life and Disability, there is a field entitled Eligible Amount and Approved Amount. If the Approved Amount is zero, the employee does not have this benefit. It would typically be in the process of being underwritten when displayed in this manner.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT. Below the header is a navigation menu with tabs for Policies, Members, and Parties. Under the Members tab, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Coverages" sub-tab is active, and a "Summary" button is highlighted.

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

**Benefit Descriptions** As of: 11Dec2006 Policy ID: 12345 Division: 000

**Medical / Dental Coverages**

- 4 Hospital - semi-private room - 100% direct pay - In Canada only
- F Worldwide Travel (includes referrals out of Canada) - 100% reimb.
- 1 None Available
- 5 Drug Benefits - direct pay - the participant pays 20% for each eligible prescription item
- 9 None Available

**Life / Disability Coverages**

**Employee Class: A ALL EMPLOYEES LIFE**

|  |                                |                         |
|--|--------------------------------|-------------------------|
| 3 Basic Life<br>Waiver of premiums                       | Eligible Amount: 25,000<br>yes | Approved Amount: 25,000 |
| 1 Accidental Death & Dismemberment<br>Waiver of premiums | Eligible Amount: 25,000<br>yes | Approved Amount: 25,000 |

**Employee Class: A ALL EMPLOYEES CRITICAL CONDITIONS**

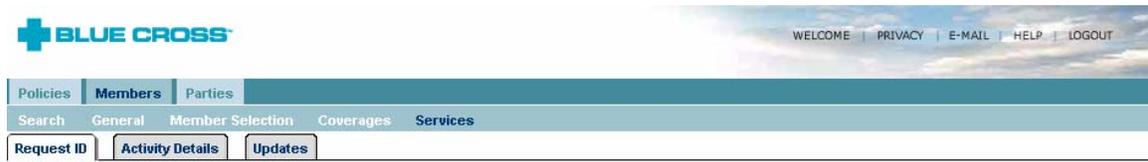
|  |                               |                         |
|--|-------------------------------|-------------------------|
| C3 Critical Conditions<br>Waiver of premiums | Eligible Amount: 50,000<br>no | Approved Amount: 50,000 |
|--|-------------------------------|-------------------------|

**Employee Class: A ALL EMPLOYEES DISABILITY**

|   |                              |                        |
|---|------------------------------|------------------------|
| 3 Short Term Disability<br>Waiver of premiums | Eligible Amount: 750<br>yes  | Approved Amount: 750   |
| 30 Long Term Disability<br>COLA               | Eligible Amount: 3,612<br>no | Approved Amount: 3,612 |
| Definition of disability                      | 60 / 60                      |                        |
| Definition of plan                            | 2 year own occupation        |                        |
| Offset provision                              | direct                       |                        |
| Pension supplement                            | no                           |                        |
| Pre-existing condition                        | 3/6/12                       |                        |
| Survivor benefits                             | no                           |                        |
| Waiver of premiums                            | yes                          |                        |

Done Return

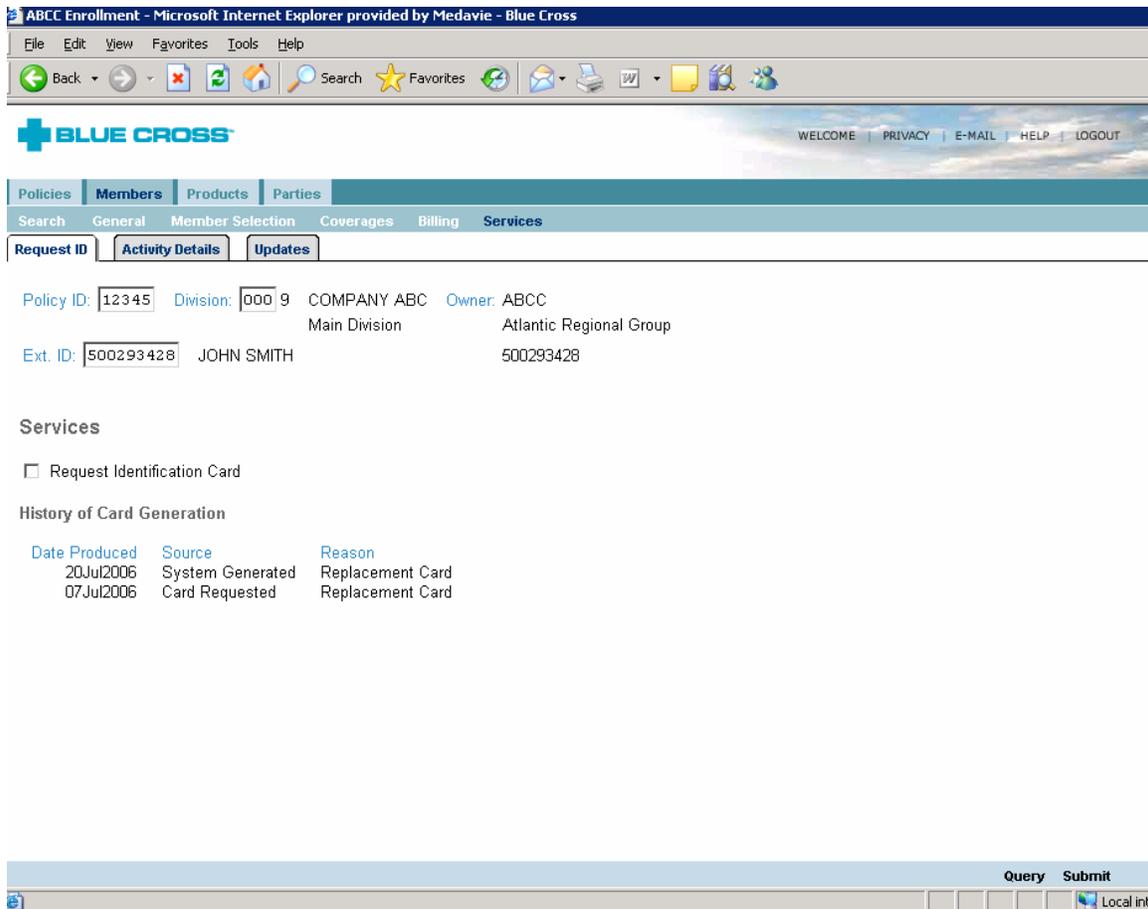
## Services - Request ID Card



Within the Services – Request ID tab, the user will be able to

- Request a new ID card
- View the last date a card was created

*Note: Users with inquiry only access will only be able to view the above information.*



## Services - Request ID Card *continued....*

### Requesting an Identification Card

To request an ID card, select the Services – Request ID tab. Check the box to the left of the Request Identification Card field and click Submit to process the request.

*Note:* Cards are automatically produced for all changes except for Reinstatements and Address Changes.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page content includes the Blue Cross logo and navigation links (WELCOME, PRIVACY, E-MAIL, HELP, LOGOUT). A menu bar contains "Policies", "Members", "Products", and "Parties". Below this is a sub-menu with "Search", "General", "Member Selection", "Coverages", "Billing", and "Services". The "Request ID" tab is selected, with sub-tabs for "Request ID", "Activity Details", and "Updates".

Policy ID:  Division:  9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Services**

Request Identification Card

**History of Card Generation**

| Date Produced | Source           | Reason           |
|---------------|------------------|------------------|
| 20Jul2006     | System Generated | Replacement Card |
| 07Jul2006     | Card Requested   | Replacement Card |

At the bottom right of the page, there are "Query" and "Submit" buttons, and a status bar showing "Local int".

## Services – Activity Details

BLUE CROSS WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Request ID Activity Details Updates

Within the Services - Activity Details tab, the user will be able to

- View a history of changes to rating statuses and policy numbers
- View changes that are pending to be processed that will affect the status or policy number

*Note: Users with inquiry only access will only be able to view the above information.*

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

BLUE CROSS WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies Members Parties

Search General Member Selection Coverages Services

Request ID Activity Details Updates

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

**Activity Details**

Information on File

| Policy/Div | Rating Status | Prov. | Empl. Class | Eff. Dt.  | Eff. Trans. Dt. | Non-Life Term. Dt. | Life Term. Dt. | Series          |
|------------|---------------|-------|-------------|-----------|-----------------|--------------------|----------------|-----------------|
| 12345 000  | Family        | NB    | A           | 01Oct2006 | 17Nov2006       |                    |                | Retention Group |

Changes Requested

None

Query Delete

Done Local intr

## Services – Activity Details *continued...*

### Activity Details

#### Information on File

This section of the screen summarizes the Rating Status, Transfer, Termination and Reinstatement history.

#### Changes Requested

This section illustrates if there are any Rating Status, Transfer, Termination or Reinstatement changes pending to be processed. All changes that are entered are not processed in real time; the system updates overnight Monday through Friday. In some instances, more than one change is required to complete the requested change. If the change in question affects information related to the rating status, policy and division or the effective/termination date of the plan, the changes would be displayed here and could involve the transaction to be “stacked”. Stacking will be displayed as Sequence 1, Sequence 2, etc. where each sequence represents a different step that must be submitted on the system in that specific order. For example, Sequence 1 would be submitted on day 1 and must update before sequence 2 can be applied on day 2. If there are 3 sequences, it will take 3 days for the work to be processed. In some cases, depending on the change, cards will be produced; the user may receive more than one card before the final card is issued. Blue Cross is taking measures to eliminate the generation of multiple cards for this transaction.

The screenshot shows a web browser window with the title "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar and menu bar are visible. The page header includes the Blue Cross logo and navigation links: WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Below this is a sub-menu with Search, General, Member Selection, Coverages, and Services. The Services tab is active, and within it, the "Activity Details" sub-tab is selected. The page displays the following information:

Policy ID: 12345 Division: 000 9 COMPANY ABC Owner: ABCC  
Main Division Atlantic Regional Group  
Ext. ID: 500293428 JOHN SMITH 500293428

**Activity Details**

Information on File

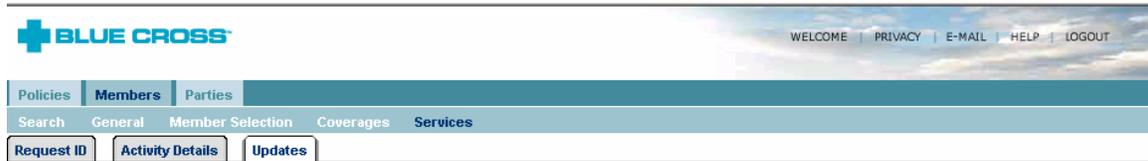
| Policy/Div | Rating Status | Prov. | Empl. Class | Eff. Dt.  | Eff. Trans. Dt. | Non-Life Term. Dt. | Life Term. Dt. | Series          |
|------------|---------------|-------|-------------|-----------|-----------------|--------------------|----------------|-----------------|
| 12345 000  | Family        | NB    | A           | 01Oct2006 | 17Nov2006       |                    |                | Retention Group |

Changes Requested

None

At the bottom of the page, there are "Query" and "Delete" buttons. The browser's status bar shows "Done" and "Local intr..."

## Services – Updates



Within the Services - Updates tab, the user will be able to

- View transactions that have been submitted current day will be processed overnight
- Delete transactions that are to be processed overnight on the employee's file
- View transactions that have been submitted but are to be processed in sequence over more than one business day

*Note: Users with inquiry only access will only be able to view the above information.*

The screenshot shows a web browser window displaying the Blue Cross web application. The browser title is "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The application interface is identical to the previous screenshot, but with the "Updates" button selected. Below the navigation menu, the following information is displayed:

Policy ID: 12345    Division: 000 9    COMPANY ABC    Owner: ABCC  
Main Division    Atlantic Regional Group

Ext. ID: 500293428    JOHN SMITH    500293428

**Member Updates**

| User Id | Date      | Description     |
|---------|-----------|-----------------|
| WebGA   | 03Dec2006 | Insured Details |

At the bottom right of the application area, there are buttons for "Query" and "Delete". The browser status bar at the bottom shows "Done" and "Local Intra".

## Services – Updates *continued...*

### Member Updates

Any changes that have been submitted will be displayed in a summary form in the Services – Updates tab. The User ID of the person who keyed the changes will be displayed as well as the date they were submitted.

The screenshot shows a web browser window titled "ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross". The browser's address bar is empty, and the page content includes the Blue Cross logo and navigation links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. The main navigation menu has tabs for Policies, Members, and Parties. Below this, there are sub-tabs for Search, General, Member Selection, Coverages, and Services. The "Updates" sub-tab is active, showing details for a member with Policy ID 12345, Division 0017, and Ext. ID 500293428. The member's name is JOHN SMITH, and the owner is ABCC, with a Sub Division of Atlantic Regional Group. A "Member Updates" table lists three updates: Policy/division/province, Insured Details, and Life/Disability Benefits, all dated 05Dec2006 and performed by user WebGA. At the bottom of the page, there are "Query" and "Delete" buttons.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Recycle Bin Mail Print W Address

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages **Services**

Request ID Activity Details **Updates**

Policy ID:  Division:  COMPANY ABC Owner: ABCC  
Sub Division Atlantic Regional Group

Ext. ID:  JOHN SMITH 500293428

**Member Updates**

| User Id | Date      | Description              |
|---------|-----------|--------------------------|
| WebGA   | 05Dec2006 | Policy/division/province |
| WebGA   | 05Dec2006 | Insured Details          |
| WebGA   | 05Dec2006 | Life/Disability Benefits |

Done Query Delete Local intranet

## Services – Updates *continued...*

### Deleting Changes

Any changes that have been submitted will be displayed in a summary form in the Services – Updates tab. The User ID of the person who keyed the changes will be displayed as well as the date they were submitted. The user can delete these changes by selecting the Delete option from the blue navigation bar on the bottom of the screen.

If there are stacked changes on the Activity Details screen, the portion of the changes not yet processed will still appear on the Updates tab.. In this case, the user is not able to delete the changes.

*Note:* If the changes were keyed by a different user, the current user is able to delete these changes also. Please be sure to double check that the User ID does not belong to someone else before deleting the changes.

ABCC Enrollment - Microsoft Internet Explorer provided by Medavie - Blue Cross

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail New Tab

Address

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages **Services**

Request ID **Activity Details** Updates

Policy ID: 12345 Division: 0017 COMPANY ABC Owner: ABCC  
Sub Division Atlantic Regional Group

Ext. ID: 500293428 JOHN SMITH 500293428

Member Updates

| User Id | Date      | Description              |
|---------|-----------|--------------------------|
| WebGA   | 05Dec2006 | Policy/division/province |
| WebGA   | 05Dec2006 | Insured Details          |
| WebGA   | 05Dec2006 | Life/Disability Benefits |

Query Delete

Done Local intranet

**APPENDIX A**

**Quick Reference Guide for Member Enrolment and Updates**

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**BLUE CROSS**

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**Group Administrator Website  
Quick Reference Guide  
Member Enrolment and Updates**

## Purpose

The purpose of this document is to provide a brief overview of the Group Administrator Website, for greater detail please refer to the online User Guide.

## Application Menu

Once the user has logged into the Group Administrator's website the **Application Menu** will be presented. To access eligibility files the user is to select **ES – Enrolment** which will enable them to add, change or inquire on benefits for members.



## Welcome to the Application Menu

You have access to the following applications:

Click On:

- |                            |                                     |
|----------------------------|-------------------------------------|
| <a href="#">ES</a>         | Enrolment                           |
| <a href="#">ES - Guide</a> | Enrollment User Guide               |
| <a href="#">COV</a>        | Group Coverage Information          |
| <a href="#">SUP</a>        | Supplies Request Form               |
| <a href="#">INQ</a>        | Other Group Administrator Inquiries |



The user will then be presented with a **Welcome Page** from which they need to select the Members option. The Members tab will allow the user to access the Search and Add New Member functions.



WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies | **Members** | Parties

## Welcome to Group Administrator Services

### Group Administrator Services gives you the opportunity to:

- View policy lists to locate your specific policy.
- Perform member-specific transactions, such as adding a new member or dependent or changing address or benefits.
- Perform member searches to locate a specific member of a policy and/or view member information.



#### Click On :

[Policies](#) to access policy and member information

[Members](#) to access member information

[Parties](#) to access general information for a person and/or institution

Once the **Members** tab has been selected, a secondary navigation bar is presented. To begin **any work**, ie enrolments or changes to existing eligibility, the user must start with the **Search** tab.

Policies | **Members** | Parties

**Search** | General | Member Selection | Coverages | Services

## Enrolling Members for Benefits

For the purpose of adding benefits for a member select the radio button beside "Name". Complete the fields for Policy ID, Division, Last and First Name. Select the **Add Member** option from the blue navigation bar on the bottom of the screen. From here the user will be presented with a series of screens to complete enrolment details. (Refer to the online User Guide under Member Enrolment for greater detail).

The screenshot shows the Blue Cross website's Member Search interface. At the top left is the Blue Cross logo. At the top right are links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the logo is a navigation bar with tabs for Policies, Members (selected), and Parties. Underneath is a sub-navigation bar with links for Search, General, Member Selection, Coverages, and Services. The main heading is "Member Search". There are two radio buttons: "Active" (unselected) and "Active and Terminated" (selected). Below this is a "Search by:" section with four radio buttons: "external identification number", "alternate identification number", "system identification number", and "name" (selected). The "name" search criteria are populated with the following information: Policy ID: 12345, Division: 000, Identification Number: (empty field), Last Name: Smith, and First Name: John. At the bottom right of the page are three buttons: "Add Member", "Clear Search Fields", and "Query".

**BLUE CROSS**

WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

### Member Search

Active  Active and Terminated

Search by:

external identification number

alternate identification number

system identification number

name

Policy ID:

Division:

Identification Number:

Last Name:

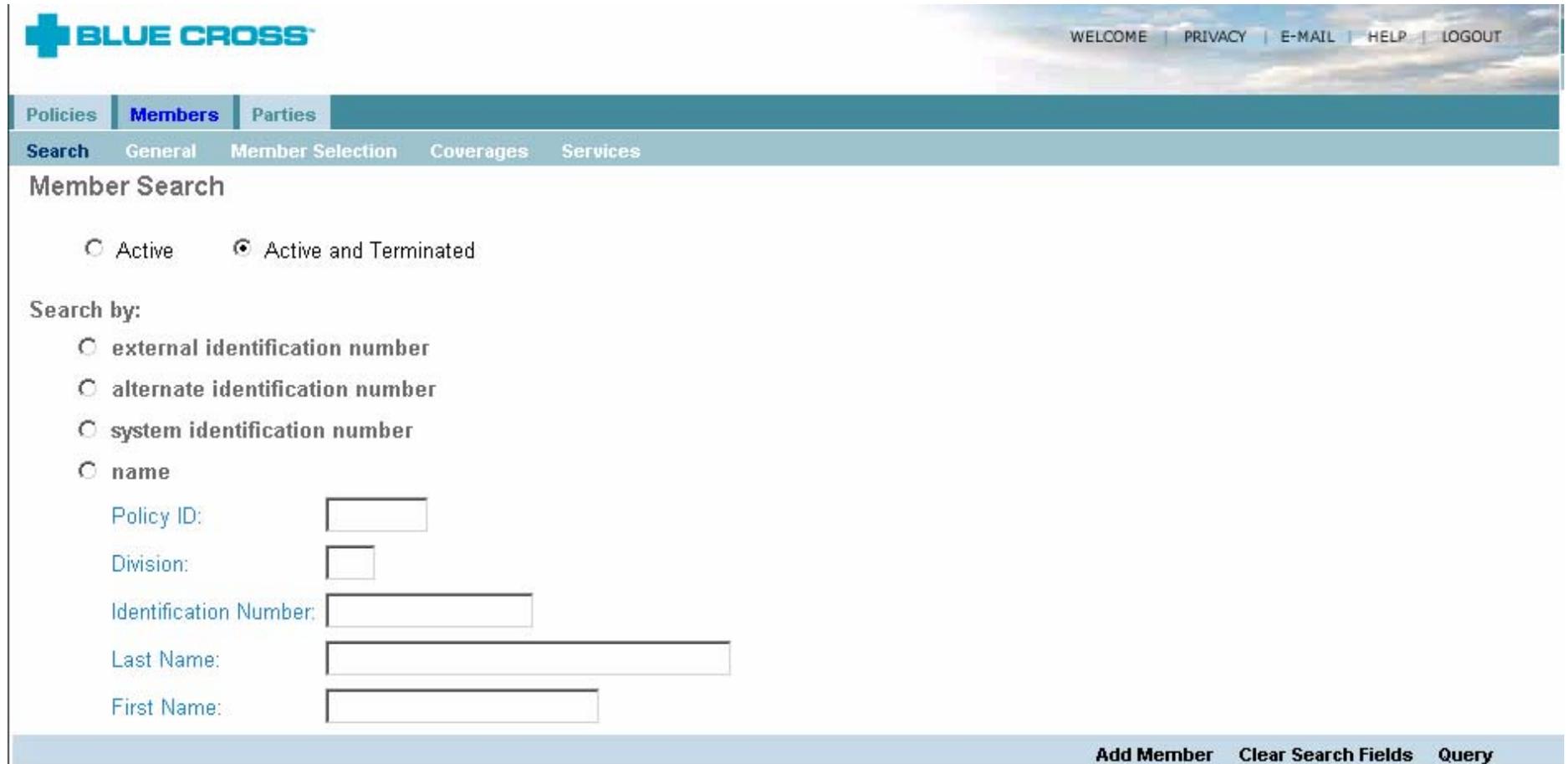
First Name:

**Add Member** **Clear Search Fields** **Query**

## Changes to Existing Members' Benefits and Personal Information

To make any changes to an existing member's coverage or personal information, the user must first open the member's file by using the Search function. The user can search by identification number or name. Once the search criteria are entered, the user should click on Query from the blue navigation bar at the bottom of the screen. They will be presented with a listing of all members matching the search information entered. The user must then select the blue link to open the employee's file.

For more details on the types of searches that can be done, refer to the online User Guide under Member Search.



The screenshot shows the Blue Cross website's Member Search interface. At the top left is the Blue Cross logo. On the top right, there are links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the logo is a navigation bar with tabs for Policies, Members (selected), and Parties. Underneath is a sub-navigation bar with tabs for Search, General, Member Selection, Coverages, and Services. The main content area is titled "Member Search" and contains two radio buttons: "Active" and "Active and Terminated" (which is selected). Below this is a "Search by:" section with four radio buttons: "external identification number", "alternate identification number", "system identification number", and "name". Underneath these are five input fields: "Policy ID:", "Division:", "Identification Number:", "Last Name:", and "First Name:". At the bottom right of the page, there is a blue bar with three buttons: "Add Member", "Clear Search Fields", and "Query".

## Common Changes

The following highlights the most common changes and where these functions are found within the Member's file.

For more details on how to process these changes please refer to the User Guide.



General

| Miscellaneous                                   | Membership Details | Member Activity |
|---|--------------------|-----------------|
| Name<br>Address<br>Termination<br>Reinstatement | Salary             | Transfers       |



Member Selection

| Insureds  | Benefits   |
|---|--|
| Status (single/family)<br>Spouse (add/update)<br>Dependent (add/update) | Benefits Displayed With History<br>Add/Update Coverage Amount<br>Add/Revise/Terminate Benefits |

## Summary of Eligibility Options for Members with Existing Benefits

| Search               | General                   | Member Selection       | Coverages | Services |
|----------------------|---------------------------|------------------------|-----------|----------|
| <b>Miscellaneous</b> | <b>Membership Details</b> | <b>Member Activity</b> |           |          |

General

### Miscellaneous

Name  
Address  
Termination  
Reinstatement

### Membership Details

Employment Details  
Salary

### Member Activity

Transfers

| Search          | General         | Member Selection                 | Coverages            | Services   |
|-----------------|-----------------|----------------------------------|----------------------|------------|
| <b>Insureds</b> | <b>Benefits</b> | <b>Co-ordination of Benefits</b> | <b>Beneficiaries</b> | <b>HSA</b> |

Member Selection

### Insureds

Status (single/family)  
Spouse (add/update)  
Dependent (add/update)

### Benefits

Benefits Displayed With History  
Add/Update Coverage Amount  
Add/Revise/Terminate Benefits  
Benefit Summary (summarizes all changes to benefit coverage)

### Co-ordination of Benefits

Add/Update COB

### Beneficiaries

Update Beneficiary

### H.S.A

Displays Details  
Add/Change HSA

| Search         | General | Member Selection | Coverages | Services |
|----------------|---------|------------------|-----------|----------|
| <b>Summary</b> |         |                  |           |          |

Coverages

### Summary

Coverage is listed by participant. The date field can be used to query past and future benefits. Benefit Description button displays card wording as well as life coverage.

| Search            | General                 | Member Selection | Coverages | Services |
|-------------------|-------------------------|------------------|-----------|----------|
| <b>Request ID</b> | <b>Activity Details</b> | <b>Updates</b>   |           |          |

Services

### Request ID

Request ID Cards  
Dates Card Were Created

### Activity Details

Status history  
Policy Number History  
Pending Changes

### Updates

View/Delete Current Day Transactions

**APPENDIX B**

**Quick Reference Guide for Member Inquiry**

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**BLUE CROSS**

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**Group Administrator Website  
Quick Reference Guide  
Member Inquiry**

## Purpose

The purpose of this document is to provide a brief overview of the Group Administrator Website, for greater detail please refer to the online User Guide

## Application Menu

Once the user has logged into the Group Administrator's website the **Application Menu** will be presented. To access eligibility files the user is to select **ES – Enrolment** which will enable them to inquire on benefits for members.



## Welcome to the Application Menu

You have access to the following applications:

Click On:

- |                            |                                     |
|----------------------------|-------------------------------------|
| <a href="#">ES</a>         | Enrolment                           |
| <a href="#">ES - Guide</a> | Enrollment User Guide               |
| <a href="#">COV</a>        | Group Coverage Information          |
| <a href="#">SUP</a>        | Supplies Request Form               |
| <a href="#">INQ</a>        | Other Group Administrator Inquiries |



The user will then be presented with a **Welcome Page** from which they need to select the Members option. The Members tab will allow the user to access the Search function.



WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies | **Members** | Parties

## Welcome to Group Administrator Services

### Group Administrator Services gives you the opportunity to:

- View policy lists to locate your specific policy.
- Perform member-specific transactions, such as adding a new member or dependent or changing address or benefits.
- Perform member searches to locate a specific member of a policy and/or view member information.



#### Click On :

[Policies](#) to access policy and member information

[Members](#) to access member information

[Parties](#) to access general information for a person and/or institution

Once the **Members** tab has been selected, a secondary navigation bar is presented. To view existing eligibility, the user must start with the **Search** tab.

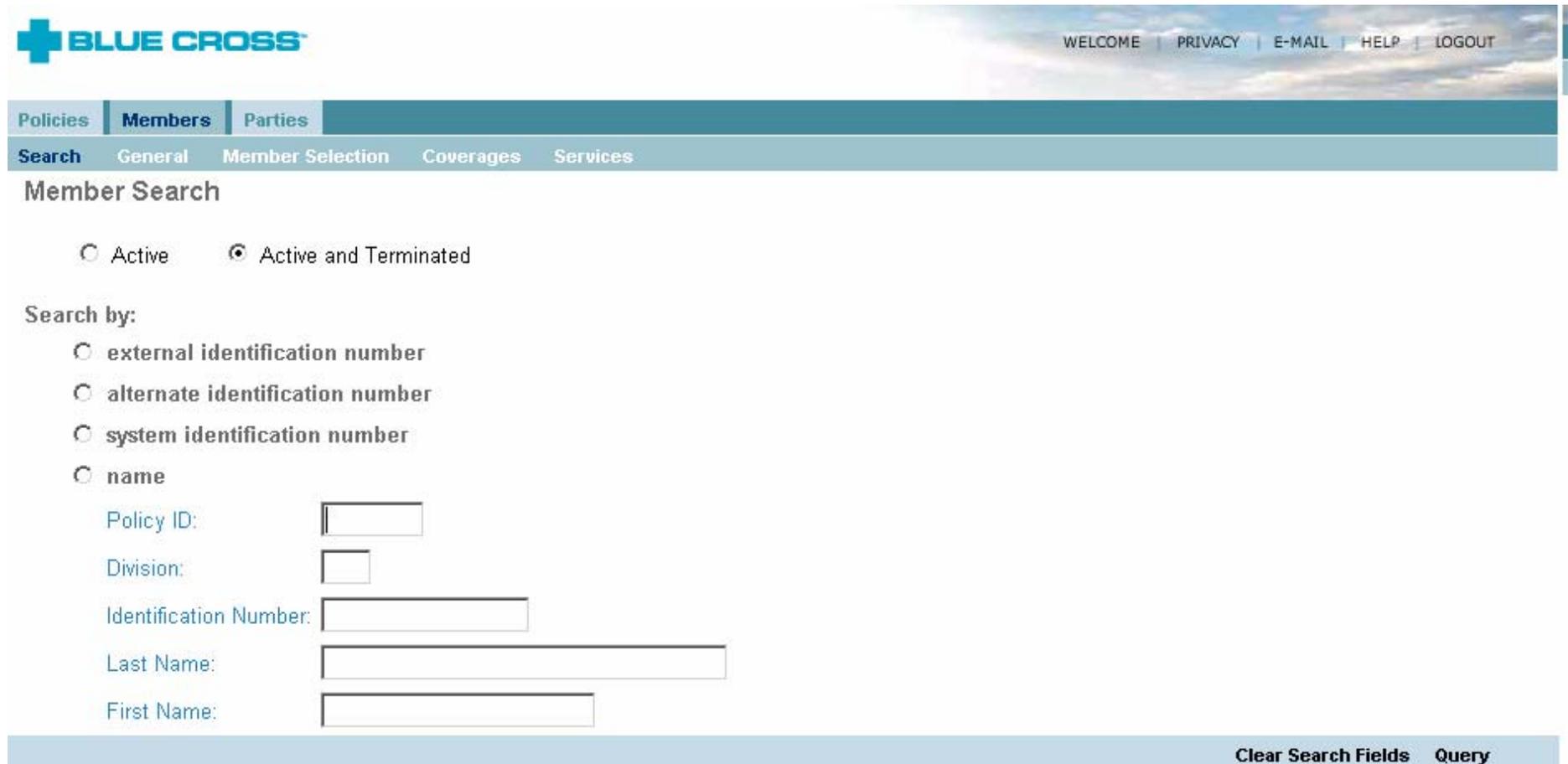
Policies | **Members** | Parties

**Search** | General | Member Selection | Coverages | Services

## View Members' Benefits and Personal Information

To view an existing member's coverage or personal information, the user must first open the member's file by using the Search function. The user can search by identification number or name. Once the search criteria are entered, the user should click on Query from the blue navigation bar at the bottom of the screen. They will be presented with a listing of all members matching the search information entered. The user must then select the blue link to open the employee's file.

For more details on the types of searches that can be done, refer to the online User Guide under Member Search.



The screenshot shows the Blue Cross website's Member Search interface. At the top left is the Blue Cross logo. On the top right, there are links for WELCOME, PRIVACY, E-MAIL, HELP, and LOGOUT. Below the logo is a navigation bar with tabs for Policies, Members (selected), and Parties. Underneath is a sub-navigation bar with links for Search, General, Member Selection, Coverages, and Services. The main heading is "Member Search". There are two radio buttons: "Active" and "Active and Terminated" (which is selected). Below this is the "Search by:" section with four radio buttons: "external identification number", "alternate identification number", "system identification number", and "name". There are five input fields: "Policy ID:", "Division:", "Identification Number:", "Last Name:", and "First Name:". At the bottom right, there are two buttons: "Clear Search Fields" and "Query".

**BLUE CROSS** WELCOME | PRIVACY | E-MAIL | HELP | LOGOUT

Policies **Members** Parties

Search General Member Selection Coverages Services

### Member Search

Active  Active and Terminated

Search by:

external identification number

alternate identification number

system identification number

name

Policy ID:

Division:

Identification Number:

Last Name:

First Name:

Clear Search Fields Query

## Summary of Member Benefits and Information

|                               |                                    |                                  |                           |                          |
|-------------------------------|------------------------------------|----------------------------------|---------------------------|--------------------------|
| <a href="#">Search</a>        | <a href="#">General</a>            | <a href="#">Member Selection</a> | <a href="#">Coverages</a> | <a href="#">Services</a> |
| <a href="#">Miscellaneous</a> | <a href="#">Membership Details</a> | <a href="#">Member Activity</a>  |                           |                          |

General

### Miscellaneous

Name  
Address

### Membership Details

Employment Details  
Salary

### Member Activity

Transfer History

|                          |                          |   |                               |                          |
|--------------------------|--------------------------|---|-------------------------------|--------------------------|
| <a href="#">Search</a>   | <a href="#">General</a>  | <a href="#">Member Selection</a>          | <a href="#">Coverages</a>     | <a href="#">Services</a> |
| <a href="#">Insureds</a> | <a href="#">Benefits</a> | <a href="#">Co-ordination of Benefits</a> | <a href="#">Beneficiaries</a> | <a href="#">HSA</a>      |

Member Selection

### Insureds

Status Information  
Spouse Information  
Dependent Information

### Benefits

Benefits Displayed With History

### Co-ordination of Benefits

COB Information

### Beneficiaries

Beneficiary Information

### H.S.A

Displays Details

|                         |                         |                                  |                           |                          |
|-------------------------|-------------------------|----------------------------------|---------------------------|--------------------------|
| <a href="#">Search</a>  | <a href="#">General</a> | <a href="#">Member Selection</a> | <a href="#">Coverages</a> | <a href="#">Services</a> |
| <a href="#">Summary</a> |                         |                                  |                           |                          |

Coverages

### Summary

Coverage is listed by participant. The date field can be used to query past and future benefits. Benefit Description button displays card wording as well as life coverage.

|                            |                                  |                                  |                           |                          |
|----------------------------|----------------------------------|----------------------------------|---------------------------|--------------------------|
| <a href="#">Search</a>     | <a href="#">General</a>          | <a href="#">Member Selection</a> | <a href="#">Coverages</a> | <a href="#">Services</a> |
| <a href="#">Request ID</a> | <a href="#">Activity Details</a> | <a href="#">Updates</a>          |                           |                          |

Services

### Request ID

Dates Card Was Created

### Activity Details

Status History  
Policy Number History

### Updates

View Current Day Transactions