Request Center Tool User Guide

May 2024

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Quick Start Summary

1) Select the request type that matches what you want to do:
- Enroll New Group
- SG Existing Group Changes – Fully Insured Only *(Renewal Paperwork, Address Change, Grandfathered Certification, etc.)*
- Blue Balance Funded Enrollment *(BBF Renewal & Existing Fully Insured to BBF)*
- New Blue Balance Funded
- Existing Blue Balance Funded to Fully Insured
- COBRA or State Continuation
- COBRA – HCSC Admin
- Regulatory Data Update *(MSP & Average Employee Count (AEC))*

2) Enter the requested information into the form

3) Add all required document attachments

4) Save and Submit your request

5) Keep an eye on your email for updates

6) Use Log button to view comments entered by the internal processor

7) Use the History button on each request to follow the group's progress
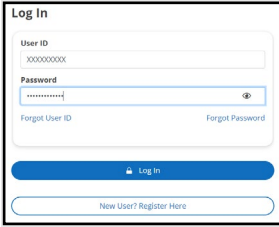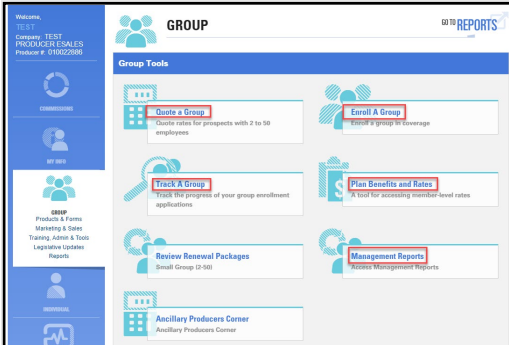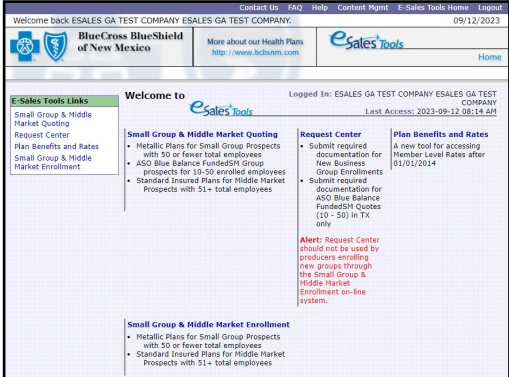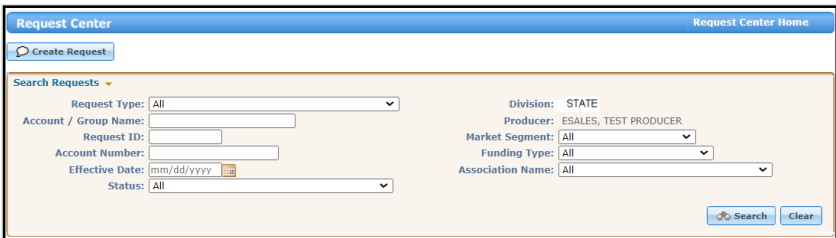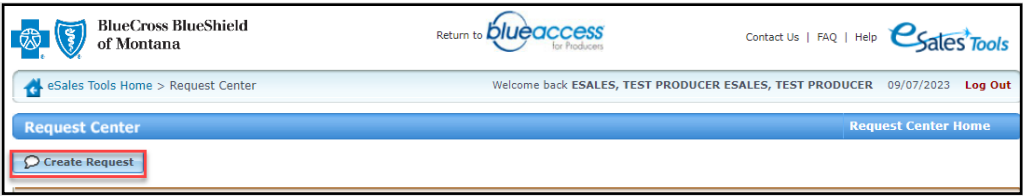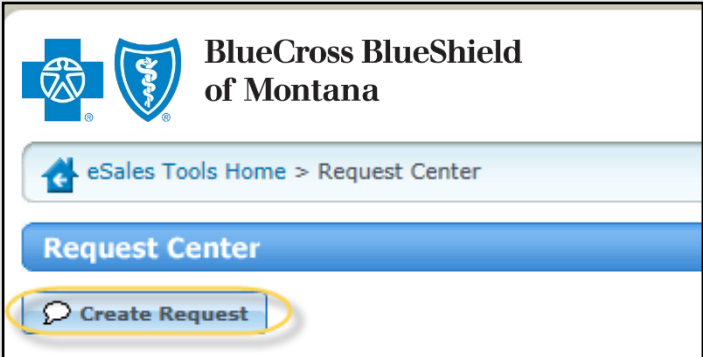
Important:
- If using the Enrollment Tool to enroll a new group, do not use Request Center
- Double-check the email you entered is where all request updates should go
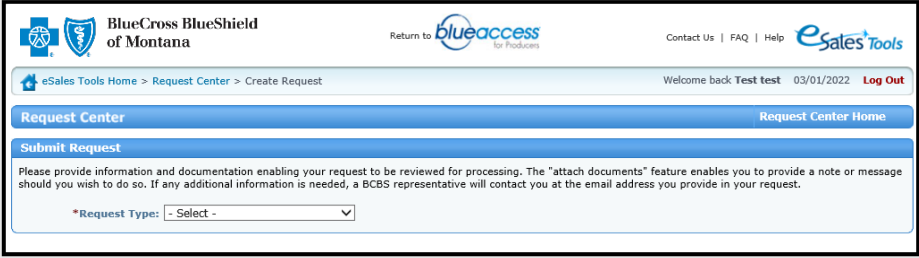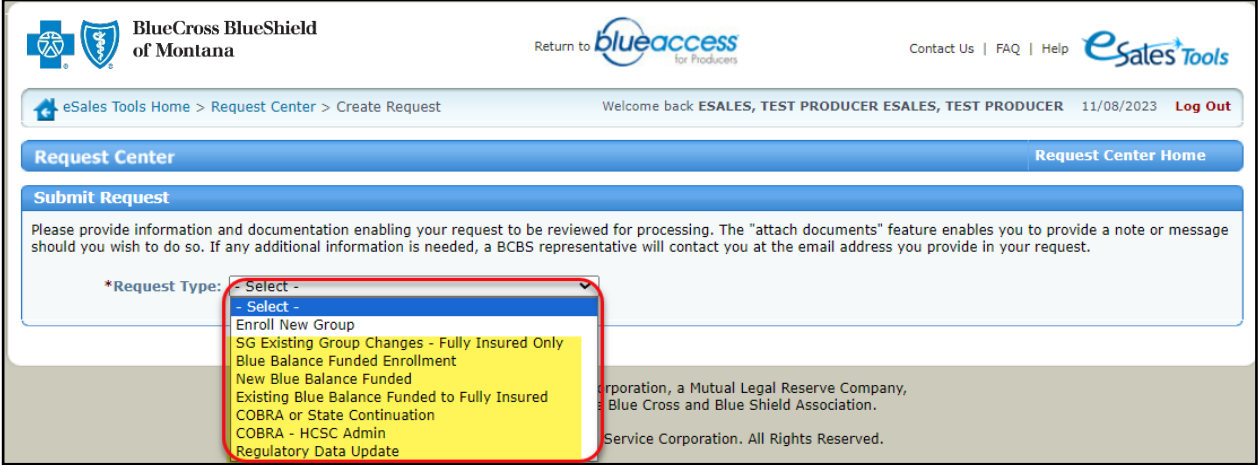- Make a note of your Request ID for easy follow-up

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

For technical support, email SGMM_TechSupport@hcsc.com

Welcome to the Request Center

Step	Action
Log In to Group Sales	Click on (or enter) this URL: https://www.bcbsmt.com/producer. Log in to Blue Access for Producers℠ (BAP℠). Result: BAP navigates to the **Welcome** page.
Group Sales Tools	Click on one of the Group Tools eSales homepage will be displayed
Access Request Center	Click on the Request Center link: ***Note – Contact your internal Administrator to delegate access to appropriate personnel.** The Request Center homepage window opens.

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

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Request Page	Result: The **Submit Request** page opens. Note: To return to the Request Center homepage, click the **Request Center Home** button on the right
Request Type	**Request Type:** Use the drop-down and select a Request Type. **Request Types:** Enroll New Group SG Existing Group Changes – Fully Insured Only Blue Balance Funded Enrollment New Blue Balanced Funded Existing Blue Balance Funded to Fully Insured COBRA or State Continuation COBRA – HCSC Admin Regulatory Data Update **Note:** Enroll New Group was an existing request type.

Request Type Enroll New Group	The Submit Request window expands and contains additional required fields when the following Request Type is selected:

Enroll New Group

- **Request Type:** Select a request type from the drop-down
- **Email Address:** Enter your email address in this field
  Note: Additional email addresses can be entered by clicking on the Add button
- **Group Name:** Enter the group name listed on paperwork
- **Quote ID:** Enter Quote number (if applicable)
- **Submitted Date:** Defaults to today's date
- **Division:** Defaults to your state
- **Producer:** Defaults to user
- **Funding Type:** Use the drop-down and select Fully Insured
- **Market Segment:** Use the drop-down and select ACA Small Group (2–50)
- **Effective Date:** Use the drop-down to select appropriate effective date of new group

Once all required information is entered, click Continue.

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

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

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

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

	Please attach the following documents. For questions, please contact your Sales representative. 📎 Attach Documents **Documents Needed for Enrollment** *Benefit Program Application (BPA) for New Small Groups 2-50 ❌ Missing *Employer Group Information (EGI) Form ❌ Missing *Enrollment Application/Change Form ❌ Missing *Wage & Tax Statement/Proof of Wages ❌ Missing Affidavit of Domestic Partnership CDHP - Employer Setup Form Dependent State Continuation of Coverage Form Disabled Dependent Certification Form Employer Representative Authorization (ERA) Discontinue * - Required Fields Save Submit To attach documents, click on the **Attach Documents** button. Please attach the following documents. For questions, please contact your Sales representative. 📎 Attach Documents ⬅ Result: The Attachments window opens.
Attach Required Documents	Click the **Choose File** button; locate the drive and folder where the documents are saved and select the file to upload. **File** Choose File No file chosen Select from the Document Type(s) drop-down and click on the **Attach File** button. The attached document will show in the **Existing Attached Documents** field. **Attachments** Select Browse to find a file(s) to attach. Uploaded files must be less than 25MB. **File** **Document Type(s)** **Description(s)** Choose File No file chosen Select ▾ Attach File **Existing Attached Documents** 	File	Date/Time Stamp	Document Type	Description	Name	Status	Delete Document
---	---	---	---	---	---	---
BPA Test.docx	09/07/2023 01:00:36	Benefit Program Application (BPA) for New Small Groups 2-50		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	COMPLETED	❌ Delete Document | **Deleted Documents** | File	Date/Time Stamp	Document Type	Description	Name
---	---	---	---	---	
Delete Documents	If the wrong document was attached, click on the **Delete Document** link to remove it from the list. **Existing Attached Documents** 	File	Date/Time Stamp	Document Type	Description	Name	Status	Delete Document
---	---	---	---	---	---	---
BPA Test.docx	09/07/2023 01:00:36	Benefit Program Application (BPA) for New Small Groups 2-50		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	COMPLETED	❌ Delete Document	 A confirmation message populates asking if you are sure you want to delete the document. Select OK or Cancel (whichever applies). **Confirmation Message** ✖ ⚠ Are you sure you want to delete the document? Ok Cancel

	Result: The deleted document will then show in the **Deleted Documents** section. **Note:** Deleted documents will not transfer from Request Center to enrollment, however they will be retained in Request Center for audit purposes. If paperwork for another group was accidentally attached, you must discontinue the request and start over. Deleted documents can still be viewed.
Submit Request	Once documents have been attached, click on the (X) in the top right-hand corner of the Attachments window to close. Click the **Save** button to verify all information is entered correctly and click **Submit** button to move the case to **Request Review.** Result: Request Submitted message populates.
Request Type SG Existing Group Changes – Fully Insured Only	The Submit Request window expands and contains additional required fields when the following request type is selected: **SG Existing Group Changes – Fully Insured Only** Select a Submission Type from the drop-down:

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

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

Once all required information is entered, click Continue.

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

|	
	Follow the attach document step above to attach any documents and click on save and submit the request.
	The request is now submitted for review.
Review Request	To review your request, search for it on the Request Center homepage using criteria available and click **Search**.
	To view information, you can select the **View** button next to the account.

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

Select a Submission Type from the drop-down:

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

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

Once all required information is entered, click Continue.

Request Type Blue Balance Funded Enrollment

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Submit Request	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Blue Balance Funded Enrollment** Follow the attach document step above to attach any documents and click on save and submit the request. The request is now submitted for review.
Review Request	To review your request, search for it on the Request Center homepage using criteria available and click **Search**.

	To view information, you can select the **View** button next to the account.
Request Type New Blue Balance Funded	The Submit Request window expands and contains additional required fields when the following request type is selected: **New Blue Balance Funded** - **Account Number:** Enter the Account Number (If applicable) - **Division:** Defaults to your state - **Account Name:** Recommended but not required to enter - **Funding Type:** Select from drop-down - **Market Segment:** Select from drop-down - **Effective Date:** Select from drop-down - **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission) - **Notes:** Type in notes if needed (optional) Once all required information is entered, click Continue. **Continue**
Submit Request	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **New Blue Balance Funded** Follow the attach document step above to attach any documents and click on save and submit the request.

The request is now submitted for review.

Review Request

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

Request Type Existing Blue Balance Funded to Fully Insured	The Submit Request window expands and contains additional required fields when the following request type is selected: **Existing Blue Balance Funded to Fully Insured** • **Account Number:** Enter the Account Number • **Division:** Defaults to your state • **Account Name:** Populates when account number and division are entered • **Funding Type:** Populates when account number and division are entered • **Market Segment:** Populates when account number and division are entered • **Effective Date:** Select from the drop-down • **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission) • **Notes:** Type in notes if needed (optional) Once all required information is entered, click Continue.
Submit Request	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Existing Blue Balance Funded to Fully Insured** Follow the attach document step above to attach any documents and click on save and submit the request.

Submit Request

Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. **Request ID 11390.**

Please provide information and documentation enabling your request to be reviewed for processing. The "attach documents" feature enables you to provide a note or message should you wish to do so. If any additional information is needed, a BCBS representative will contact you at the email address you provide in your request.

*Request Type:	Existing Blue Balance Funded to Fully Insured ▼	
*Account Number:	X6A450	[Change]
*Division:	Montana	*Producer: ESALES, TEST PRODUCER
*Funding Type:	Fully Insured ▼	Account Name: AMATEST_EX FI
*Effective Date:	12/01/2023 ▼	*Market Segment: Small Group (10-50) ▼
*Submitter Email Address:		
Notes:	TEST	

Please attach the following documents. For questions, please contact your Sales representative.

📎 Attach Documents

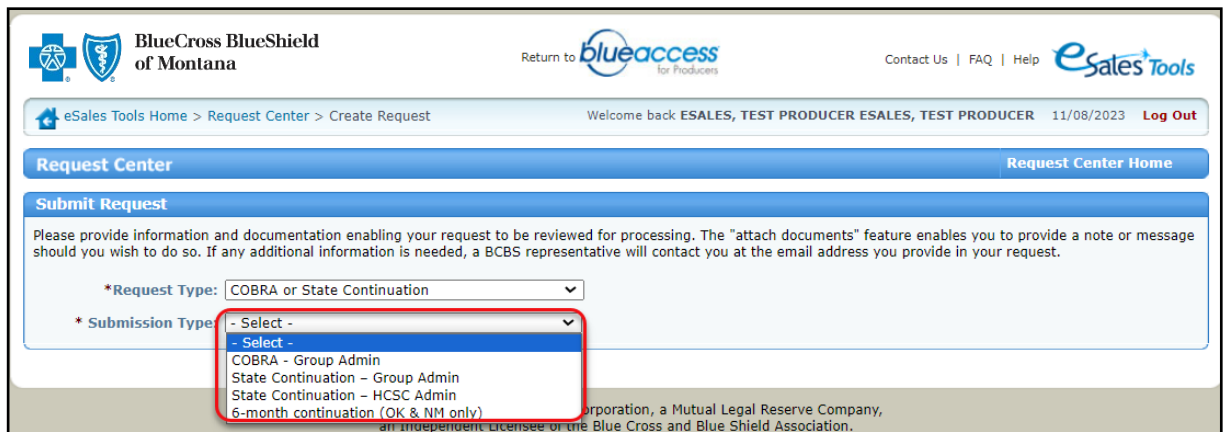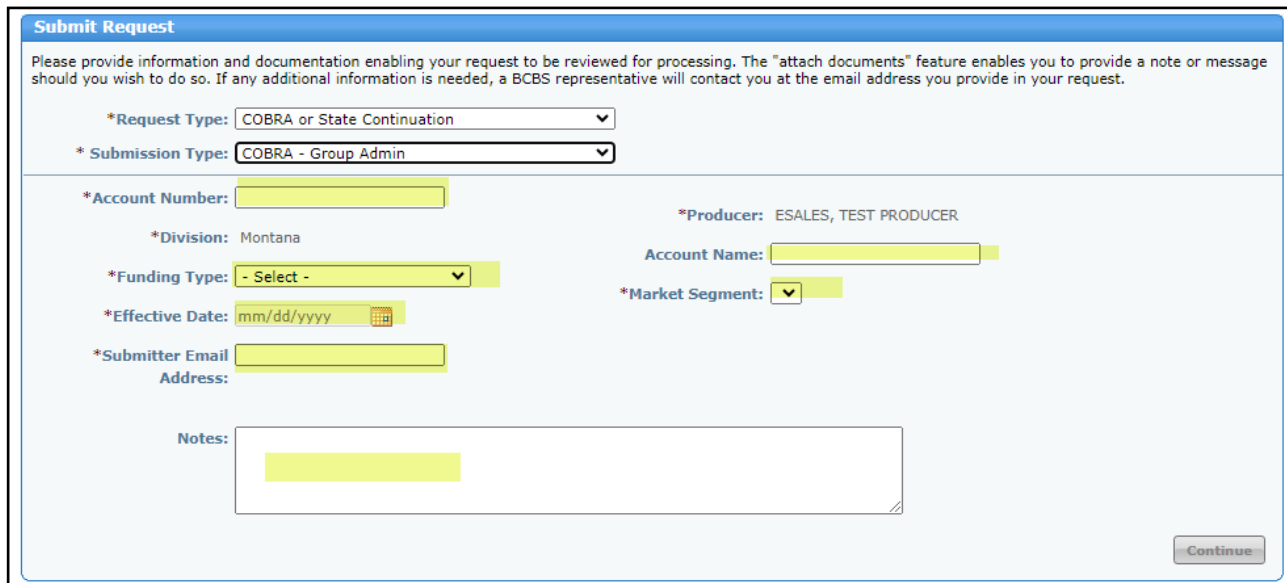**Documents Needed for Request**

*Benefit Plan Selection Form/ Small Group Benefit Program Application (IL- BPS/ ALL- BPA)	✅ Attached
*EGI	✅ Attached
*Renewal Exhibit with fully insured rates	✅ Attached
Census or Membership Mapping Instructions	
Email	
Other	

[Discontinue]   * - Required Fields   [Save] [Submit]

The request is now submitted for review.

Review Request

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

Search Requests ▾

Request Type:	All ▼	Division:	Montana
Account / Group Name:		Producer:	ESALES, TEST PRODUCER
Request ID:	11390	Market Segment:	All ▼
Account Number:		Funding Type:	All ▼
Effective Date:	mm/dd/yyyy 📅	Association Name:	All ▼
Status:	All ▼		

[🔍 Search] [Clear]

	Account / Group Name	Account Number	Status	Request ID	Request Type	Division	Effective Date
[View]	AMATEST_EX FI	X6A450	Std Mkts Request Pending Internal	11390	Existing Blue	Montana	12/01/2...

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

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	The Submit Request window expands and contains additional required fields when the following request type is selected: **COBRA or State Continuation**
	Select a Submission Type from the drop-down:
Request Type COBRA or State Continuation	
	Following selection of Submission Type COBRA or State Continuation, the following fields will be displayed:

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

Review Request	To review your request, search for it on the Request Center homepage using criteria available and click **Search**. To view information, you can select the **View** button next to the account.
Request Type COBRA – HCSC Admin	The Submit Request window expands and contains additional required fields when the following request type is selected: **COBRA – HCSC Admin** • **Account Number:** Enter the Account Number • **Division:** Defaults to your state • **Account Name:** Populates when account number and division are entered • **Funding Type:** Populates when account number and division are entered • **Market Segment:** Populates when account number and division are entered • **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy) • **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission) • **Notes:** Type in notes if needed (optional) Once all required information is entered, click Continue. ![Continue]

Submit Request	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **COBRA – HCSC Admin** Follow the attach document step above to attach any documents and click on save and submit the request. The request is now submitted for review.
Review Request	To review your request, search for it on the Request Center homepage using criteria available and click **Search**. To view information, you can select the **View** button next to the account.

	The Submit Request window expands and contains additional required fields when the following request type is selected: **Regulatory Data Update**
	Select a Submission Type from the drop-down.
	Note: HCSC Only Submission cannot be selected. You will receive an error message if you try to save.
Request Type Regulatory Data Update	Result: Following selection of Submission Type, the following fields will be displayed:
	• **Account Number:** Enter the account number
	• **Division:** Defaults to your state
	• **Account Name:** Populates when account number and division are entered
	• **Funding Type:** Populates when account number and division are entered
	• **Market Segment:** Populates when account number and division are entered
	• **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)
	• **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
	• **Notes:** Type in notes if needed (optional)
	Once all required information is entered, click Continue.

Submit Request	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Regulatory Data Update** Follow the attach document step above to attach any documents and click on save and submit the request. Click on the **Submit** button to submit the request for further review.
Review Request	To review your request, search for it on the Request Center homepage using criteria available and click **Search**.

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	 To view information, you can select the **View** button next to the account.
Request Needing Attention	**Request Needing Attention** If there are any requests that may need users to complete additional steps (for example, due to Missing/ Incorrect/Incomplete documents), an email to the person in the Submitter email address field will be sent. Those requests can be found on the bottom section of the Request Center homepage.
Request Needing Attention	Click on the **View** button next to the request needing updates. You will be able to view notes and comments of processors in the Log.

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

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

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

The request will go back to the processor with proper documentation.
Request Completion	**Request Completion**

After your Request has been worked, you will receive email confirmation that the Request is now complete.

You can also verify on Request Center homepage that Status is updated to Std Mkts Request Completed for your request.

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Status Definitions	• Std Mkts Account Processing in Progress *(Request was submitted and is being reviewed internally)* • Std Mkts Financial Account Setup (BBF Billing) *(Only for Blue Balance Funded requests, where the request is with our internal financial team before sending to UW)* • Std Mkts Information Received from Submitter *(Missing information has been received by internal personnel and will continue to be reviewed and processed)* • Std Mkts More Information Required *(Request has been sent back to external submitter for more information)* • Std Mkts Request Approved by UW *(UW has approved the account and will be sent to internal user to review approved changes)* • Std Mkts Request Completed *(Request has been completed, no further action required.)* • Std Mkts Request Discontinued *(Request has been discontinued per request or due to account inactivity from external user (ex: More Information Required was not received) and a new request will need to be created)* • Std Mkts Request Info needed by Operations *(Request has been reviewed by internal Operations user and requires more information from the producer)* • Std Mkts Request Pending Internal Review *(Request has been submitted and is awaiting internal review)* • Std Mkts Request Pending UW Review *(Internal Operations review has been completed and has been sent to UW for their review)* • Std Mkts Request Pending UW Re-Review *(Initial request was sent back for more information, but is now back to the UW for their re-review)*
Emails to be received	• Std Mkts Request Initiated *(Email that is sent with initiation of request)* **(soon to be eliminated and replaced when Pending Internal Review)** • Std Mkts Request info needed by Operations *(Email indicating that more information is required, producer must log into Request Center to view details using the Log)* • Std Mkts Request Completed *(Email notifying the producer that request is complete with no further action needed)* • Std Mkts Request Discontinued *(Email notifying the producer that request has been discontinued with Reason Code description, and any additional notes are provided in the Log)*