Adding New Employee and Dependents

ADDITIONAL INFORMATION

For any additional information or assistance using this guide please call our toll-free number at 1-833-ToBeWell (1-833-862-3935) & TTY: 1-855-851-2018 or e-mail us at Business@bewellnm.com.

Brokers and administrators can add a dependent to an eligible employee by, as previously mentioned, clicking on the “Update Enrollment” button on the employee dashboard. Users will be taken to a wizard-like set of screens in which the first question is whether the update includes an addition. The screens then guide the user through the reason for the addition, the date of the termination and which dependents are being added.

There are two ways a dependent can be added. Certain life choices, such as marriage, birth, or adoption, require the user to add an appropriate dependent, whereas other events require the user to add a dependent as part of the screens defining the event. The updated policies will be delivered daily to the premium billing system, which, when loaded, will result in real time updates of the financial impact of the change.
1.1 Adoption, Foster, Child Support

**STEP 1:** Select the Changing or adding coverage radio button since you are adding a dependent to your group, and click Next.

**STEP 2:** Select from the Drop-down Pick-list; Adoption, Foster, Child Support to specify the reason for the change. This will initiate prompt text alerting you that this will qualify employee for an SEP; as seen below…

**STEP 3:** Next, you will be prompted to enter in the date of the qualifying life event; utilizing the Calendar functionality, choose the date of occurrence of the event. **Note:** This must be reported within 30 days of the occurrence for the customer to be eligible for the SEP.
Adding Dependents

Once you have put in the proper date, hit “Next”

On the next screen, the effective date of coverage will be displayed. The effective coverage date will vary depending on the QLE being reported. Once you have reviewed to ensure the proper date is input, proceed by clicking the “Okay, Next” button.

STEP 4: One the next screen, you will click the Add Dependent button and, in the subsequent pop up screen, fill out the demographic information of the new child and the coverage they intend to enroll into.
After adding the dependent, you will see them appear in the previously empty table on the same screen.

**STEP 5:** Lastly, you will be brought to a Review and Submission screen where you can verify that all the information entered is valid. Furthermore, on this screen, you/the employee will see the newly calculated cost of the employee plans accounting for the newly added dependent.
Adding Dependents

Once the user has reviewed the information, they can submit their SEP by pressing the Confirm & Finish button. This will populate a confirmation message prompting them to return to their Employee Dashboard.

Upon returning to the dashboard, the user will see that there are 2 distinct changes:

1. There is now Header text alerting the Employee that they are current in a Special Enrollment Period
Adding Dependents

2. The Upcoming/Change in their policy is displayed below their existing policy cost.
Adding Dependents

1.2 Birth of a Child

STEP 1: Select the Changing or adding coverage radio button since you are adding a dependent to your group, and click Next.

STEP 2: For this particular scenario, we are going to be adding coverage due to a Birth of an employee dependent. The dropdown menu will contain several different options depending on your role in the system. Super admins will see all available options, whereas employers and employees will only see limited options.

STEP 3: Next, you will be prompted to enter in the date the event occurred. Utilizing the Calendar functionality, choose the date of occurrence for the event; once selected click Next to continue. Note: This must be reported within 30 days of the occurrence for the customer to be eligible for the SEP.
On the next screen, the effective date of coverage will be displayed; The effective coverage date will vary depending on the QLE being reported. Once you have reviewed to ensure the proper date is input, proceed by clicking the “Okay Next” button.
Adding Dependents

STEP 4: One the next screen, you will click the Add Dependent button and, in the subsequent pop up screen, fill out the demographic information of the new child and the coverage they intend to enroll into.

After adding the dependent, you will see them appear in the previously empty table on the same screen. **Note:** For a **Birth** the DOB of the child and the date of the QLE **must match**; this is a safe guard built into the system to ensure the child will be covered from their DOB.

STEP 5: Lastly, the you will be brought to a Review and Submission screen where you can verify that all the information entered is valid. Furthermore, on this screen, you/the employee will see the newly calculated cost of the employee plans accounting for the newly added dependent.
Once the user has reviewed the information, they can submit their SEP by pressing the Confirm & Finish button. This will populate a confirmation message prompting them to return to their Employee-Dashboard.

Upon returning to the dashboard, the user will see that there are 2 distinct changes:

1. There is now Header Test Alerting the Employee that they are current in a Special Enrollment Period
2. The Upcoming/Change in their policy is displayed below their existing policy cost
1.3 LOSS OF HEALTH COVERAGE

Users/Employees will use the Loss of Health Coverage option when they, or one of their dependents, has lost their existing coverage and now choose to enroll via their employer. In this example we will use an employee who has lost coverage and is now enrolling through the SHOP Portal.

STEP 1: From the employee roster, select the employee who had previously waived coverage but now wishes to enroll by clicking the + Add Coverage button.
Adding Dependents

STEP 2: This will initiate the SEP flow; select Loss of coverage from the drop-down list and this will prompt text alerting you that this will qualify said employee for an SEP; as seen below…

![Update Enrollment](image)

STEP 3: Next, you will be prompted to enter in the date of the qualifying life event; utilizing the Calendar functionality, choose the date of occurrence of the event. **Note:** This must be reported within 30 days of the occurrence for the customer to be eligible for the SEP.

![Update Enrollment](image)

Per policy, the effective coverage date will start the first day of the next month of coverage. Once you have reviewed to ensure the proper date is input, proceed by clicking the “Okay, Next” button.
Adding Dependents

STEP 4: The user will then be brought to a Review screen where they can verify that all the information they have entered thus far is accurate.

Once the user has validated the information, click the +Create new enrollment button to complete the employee’s enrollment application. This will bring up a completion screen where the user can either enroll the individual themselves or invite the employee to select the plans themselves.
For the purpose of this guide, we will choose to proxy as the employee and complete the application on their behalf.

**STEP 5:** The first screen of the application will be the Review Membership. The employer has already entered some detailed information about employees and dependents (if applicable), on his/her group application. Therefore, the Employee Details section of the page will already be populated with employee information. Review this screen for accuracy.

If you want to change or edit any of this information, click the **Edit Household Info button**.
**Adding Dependents**

**STEP 6:** Next, the user will/employee will select the Medical Plan they wish to enroll in; it is worth noting that the plans that will populate here will be based on the employer reference plan, in this case Metal Level Gold plans. All the same search, filter, and comparison functionality exists here as it did in the New Business flow.

**STEP 7:** After selecting a medical plan, the user will be directed to the Dental Plan selection screen. Here the user/employee is able to see which, if any, dental plan(s) are provided by the employer. However, if the employee decides that the he/she and the dependents do not wish to enroll in dental coverage, simply click the relevant check box at the top of the screen, then click “Next.”
STEP 8: The final step to completing the employee application is to review and electronically sign the application.
Adding Dependents

The system will then direct the employee to a Summary Screen, where he/she will be asked to review all the information on the application (i.e. Household, Plan, E-Signature). Once verifying that all the information provided is accurate and up-to-date, click the “Finish” button.

Once the application is submitted, a successful submission screen will appear where you can return to the employee/employer dashboard and verify that this new employee is now enrolled.

1.4 Loss of Medicaid/CHIP

Users/Employees will use the Loss of Medicaid/CHIP option when they/one or their dependents were previously receiving Medicaid/CHIP benefits from the state but are now choosing to enroll through their employer. In this example we will use an employee who has lost coverage and is now enrolling through the SHOP Portal.
Adding Dependents

**STEP 1:** From the employee roster, select the employee who had previously waived coverage but now wishes to enroll. Click the + Add Coverage button to continue.

**STEP 2:** This will initiate the SEP flow; Select Loss of Medicaid/CHIP from the drop-down list and this will prompt text alerting you that this will qualify said employee for an SEP; as seen below.
Adding Dependents

STEP 3: Next, you will be prompted to enter in the date of the qualifying life event; utilizing the Calendar functionality, choose the date of occurrence of the event. Note: Per policy must be reported within 60 days of the occurrence for the customer to be eligible for the SEP.

Per policy, the effective coverage date will start the first day of the next month of coverage. Once you have reviewed to ensure the proper date is input, proceed by click the Next button.

STEP 4: The user will then be brought to a review screen where they can verify that all the information, they have entered is accurate.
Adding Dependents

Once the user has validated the information, click the “Create new enrollment” button to complete the employee’s enrollment application. This will bring up a completion screen where the user can either enroll the individual themselves or invite the employee to select the plans themselves.

For the purpose of this guide, we will choose to proxy as the employee and complete the application on their behalf.

**STEP 5:** The first screen of the application will be the Review Membership. The employer has already entered some detailed information about employees and dependents (if applicable), on his/her group application. Therefore, the Employee Details section of this screen will already be populated with employee information. Review this screen for accuracy.
Adding Dependents

If you want to change or edit any of this information, click the Edit Household Info button.

STEP 6: Next, the user will/employee will select the Medical Plan they wish to enroll in; it is worth noting that the plans that will populate here will be based off the employer reference plan, in this case Metal Level Gold plans. All the same search, filter, and comparison functionality exists here as it did in the New Business flow.
STEP 7: After selecting a medical plan, the user will be directed to the Dental Plan selection screen. Here the user/employee is able to see which, if any, dental plan(s) are provided by the employer. However, if the employee decides that he/she and the dependents do not wish to enroll in dental coverage, simply click the relevant check box at the top of the screen, then click “Next.”
STEP 8: The final step to completing the employee application is to review and electronically sign the application.

The system will then direct the employee to a Summary Screen, where he/she will be asked to review all the information on the application (i.e. Household, Plan, E-Signature). Once verifying that all the information provided is accurate and up-to-date, click the “Finish” button.
Adding Dependents

Once the application is submitted, a successful submission screen will appear where you can return to the employee/employer dashboard and verify that this new employee is now enrolled.

1.5 MARRIAGE

STEP 1: Select the Changing or adding coverage radio button since you are adding a dependent to your group, and click Next.
Adding Dependents

**STEP 2:** Select from the Drop-down list Marriage to specify the reason for the change. This will initiate prompt text alerting you to this even will qualify said employee for an SEP; as seen below.

![Update Enrollment](image)

**STEP 3:** Next, you will be prompted to enter in the date the event occurred. Utilizing the Calendar functionality, choose the date of occurrence for the event. **Note:** This must be reported within 30 days of the occurrence for the customer to be eligible for the SEP.

![Update Enrollment](image)

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Adding Dependents

Per policy, the effective coverage date will start the first day of the next month of coverage. Once you have reviewed to ensure the proper date is input, proceed by clicking the “Okay, Next” button.

**STEP 4**: One the next screen, the user will click the Add Dependent button and, in the subsequent pop up screen, fill out their demographic information of the spouse/LP they are adding ensuring to select “spouse” from the relationship drop down; and to select the coverage they intend to enroll into.
Adding Dependents

After adding the dependent’s spouse, you will see them appear in the previously empty table on the same screen.

STEP 5: Lastly, the you will be brought to a Review and Submission screen where you can verify that all the information entered is valid. Furthermore, on this screen, you/the employee will see the newly calculated cost of the employee plans accounting for the newly added dependent.
Once the user has reviewed the information, they can submit their SEP by pressing the Confirm & Finish button. This will populate a confirmation message prompting them to return to their Employee Dashboard.

Upon returning to the dashboard, the user will see that there are 2 distinct changes:

1. There is now Header Test Alerting the Employee that they are current in a Special Enrollment Period.
2. The Upcoming/Change in their policy is displayed below their existing policy cost.
1.6 **NEWLY ELIGIBLE EMPLOYEE**

The Newly Eligible Employee SEP is an option that only Employers, Admins/Brokers have. Users/Employers will use the Newly Eligible Employee SEP, for the most part, under two circumstances:

1. For a new hire to the company
2. When a previously ineligible employee (part-time) becomes a full-time employee

In this example we will use a full-time employee who has recently been hired and therefore is now eligible to enroll through the SHOP Portal.

**STEP 1:** From the Employee Dashboard, navigate to the Employee Roster and, on the bottom right hand side of the screen, click the Add Employee button.
Adding Dependents

This will bring up the Add New Employee screen where the user/employer will add in the demographic information of their new employee. There are two options to add this employee, to add the with or without a new plan. In our scenario, this is a new full-time eligible employee, so we will choose to add them with a plan.

STEP 2: This will initiate the SEP flow; select Newly Eligible Employee from the drop-down list and this will prompt text alerting you that this will qualify said employee for an SEP; as seen below.
**Adding Dependents**

**STEP 3:** Next, you will be prompted to enter in the date of the qualifying life event; utilizing the Calendar functionality, choose the date of occurrence of the event. **Note:** Per policy must be reported within 30 days of the occurrence for the customer to be eligible for the SEP.

On the next screen you as the Employer/Admin must decide when coverage will start for this newly eligible employee. Utilizing the drop-down menu, select what the coverage month will be. Per policy you can choose up to two months from the hire month.
Adding Dependents

Once you have reviewed to ensure the proper date is input, proceed by clicking the “Okay, Next” button.

**STEP 4:** The Employer/Admin will then be brought to a Review screen where they can verify that all the information, entered is accurate.

Once the user has validated the information, click the +Create new enrollment button to complete the employee’s enrollment application. This will bring up a completion screen where the user can either enroll the individual themselves or invite the employee to select the plans themselves.
For the purpose of this guide, we will choose to proxy as the employee and complete the application on their behalf.

**STEP 5:** The first screen of the application will be the Review Membership. The employer has already entered some detailed information about employees and dependents (if applicable), on his/her group application. Therefore, the Employee Details section of the page will already be populated with employee information. Review this screen for accuracy.

If you want to change or edit any of this information, click the **Edit Household Info button**.
STEP 6: Next, the user will/employee will select the Medical Plan they wish to enroll in; it is worth noting that the plans that will populate here will be based off the employer reference plan, in this case Metal Level Gold plans. All the same search, filter, and comparison functionality exists here as it did in the New Business flow.

STEP 7: After selecting a medical plan, the user will be directed to the Dental Plan selection screen. Here the user/employee is able to see which, if any, dental plan(s) are provided by the employer. However, if the employee decides that he/she and the dependents do not wish to enroll in dental coverage, simply click the relevant check box at the top of the screen, then click “Next.”
STEP 8: The final step to completing the employee application is to review and electronically sign the application.

The system will then direct the employee to a Summary Screen, where he/she will be asked to review all the information on the application (i.e. Household, Plan, E-Signature). Once verifying that all the information provided is accurate and up-to-date, click the “Finish” button.
Adding Dependents

Once the application is submitted, a successful submission screen will appear where you can return to the employee/employer dashboard and verify that this new employee is now enrolled.