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Retail Producer Portal: Enroll Member in Major Medical Functions

Effective June 04, 2021

Blue Cross and Blue Shield of Illinois, Blue Cross and Blue Shield of Montana, Blue Cross and Blue Shield of New Mexico, Blue Cross and Blue Shield of Oklahoma, and Blue Cross and Blue Shield of Texas
A Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association.

Enroll Member Button



Producer opens a client's retail policy and clicks Enroll Member button.

The screenshot displays a web application interface with a navigation menu at the top containing 'Home', 'Client Info', 'E-Communication', 'Quotes', 'Resources', 'Training', and 'Enrollment'. Below the menu are three main sections: 'Client Search' with a magnifying glass icon, 'Client Leads' with 'Add New Prospect' and 'Search for Prospects' links, and 'Reporting' with 'Create Report', 'View My Custom Reports', and 'Book of Business' links. A 'Back to Search Results' button is on the left, and a 'Submit E-Question' button is on the right. In the center, there is a 'Select Transaction' dropdown menu and a 'GO' button. The 'Enroll Member' button is highlighted with a red rectangular box. Below these elements is a 'Client Information' section with a dropdown arrow, containing the following details:

Account Number:	921141111	Home Phone:	(708) 906-0000	Spouse Cell Phone:	
Name:	NINA SMITH	Cell Phone:		Fax:	
Address:	4610N182	Work Phone:			
	COUNTRY HILLS, IL 60478-0000				
E-mail	NDASMITH@AOL.COM				

Feature is available in all states



Enroll Member Button Functions



When the producer clicks the Enroll Member button and ALL members on Major Medical Policy are under age 64 (i.e., age 63 and under as of the day the Enroll Member button is clicked), the following takes place:

- Only “Enroll in Major Medical” tab displays
- User is prompted to chose the members they wish to enroll in another U65 Major Medical policy.
- A selection must be made for all persons listed.
- Options Include:

Select One ▼
Select One
Primary
Spouse/Domestic Partner
Dependent
-- Exclude --

Choose Enrollment

Enroll in Major Medical

Please Note: A selection must be made for all Members listed below. Only one Primary and one Spouse/Domestic Partner may be selected. Primary individuals under the age of 16 years cannot have dependents and Spouse cannot be under the age of 16 years.

Relationship to Primary	Name	DOB
Select One ▼	JANET R DOE	05/17/1972
Select One ▼	JOHN M DOE	08/23/1975
Select One ▼	JESSICA S DOE	02/03/2005
Select One ▼	JOSEPH T DOE	11/30/2008

Cancel Enroll in Major Medical

Feature is available in all states



Enroll Member Button Functions



If the producer clicks the Enroll Member button and one or more persons on the major medical policy are within 365 days of their 65 birthday, the following occurs:

- Both “Enroll in Medicare” & “Enroll in Major Medical” tabs display
- “Enroll in Medicare” is defaulted as the 1st tab displayed with option to toggle between U65 and O65 Enrollment.

- A message displays that an individual on this policy may be eligible for Medicare based on age.

Choose Enrollment

Attention: A member on this Policy may be eligible for Medicare coverage

Enroll in Medicare **Enroll in Major Medical**

Please Note: If more than one member name appears below, Medicare enrollment must be made for each individual separately.

	Name	Age 65 Date
<input type="radio"/>	JANET R DOE	08/27/2021
<input type="radio"/>	JOHN M DOE	08/27/2021

Cancel **Enroll in Medicare**

Choose Enrollment

Attention: A member on this Policy may be eligible for Medicare coverage

Enroll in Medicare **Enroll in Major Medical**

Please Note: A selection must be made for all Members listed below. Only one Primary and one Spouse/Domestic Partner may be selected. Primary individuals under the age of 16 years cannot have dependents and Spouse cannot be under the age of 16 years.

Relationship to Primary	Name	DOB
Select One	JANET R DOE	05/17/1972
Select One	JOHN M DOE	08/23/1975
Select One	JESSICA S DOE	02/03/2005
Select One	JOSEPH T DOE	11/30/2008

Cancel **Enroll in Major Medical**

Enroll in Medicare feature is only available in IL, NM, OK and TX



Enroll Member Button Functions



If the producer clicks on the Enroll Member button and any person on the Major Medical policy is within 365 days of their 65 birthday AND the producer does not have an O65 profile in our RPP system, the following takes place:

- In the rare event a producer only has an U65 profile and does not have an O65 profile, the producer will be prompted to contact Producer Service.
- If the user sees this message, they will only be able to submit U65, Major Medical enrollments.
- Note: This function ONLY checks for an O65 Profile, NOT AHIP Certification.

Choose Enrollment

Attention: A member on this Policy may be eligible for Medicare coverage

Please Note: If more than one member name appears below, Medicare enrollment must be completed for each individual separately.

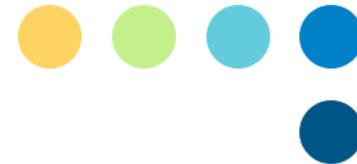
	Name	Age 65 Date
<input type="radio"/>	JANET R DOE	08/27/2021
<input type="radio"/>	JOHN M DOE	08/27/2021

Our Records do not appear to indicate an active Medicare Profile in RPP. Please contact Producer Services for assistance.

This feature is only available in IL, NM, OK and TX



Enroll Member Button Functions



If the producer clicks the Enroll Member button and the RPP Enrollment tab has been temporarily disabled, the following occurs:

- In the rare event either of the RPP Enrollment tabs have been disabled, the producer can wait for the tab to become enabled or submit the app via the Retail Shopping Cart or via paper.

Choose Enrollment

Attention: A member on this Policy may be eligible for Medicare coverage

Please Note: If more than one member name appears below, Medicare enrollment must be completed for each individual separately.

	Name	Age 65 Date
<input type="radio"/>	JANET R DOE	08/27/2021
<input type="radio"/>	JOHN M DOE	08/27/2021

RPP Enrollment is temporarily unavailable. Please submit application via RSC or Paper.

Choose Enrollment

Attention: A member on this Policy may be eligible for Medicare coverage

Please Note: A selection must be made for all Members listed below. Only one Primary and one Spouse/Domestic Partner may be selected. Primary individuals under the age of 16 years cannot have dependents and Spouse cannot be under the age of 16 years.

Relationship to Primary	Name	DOB
Select One	JANET R DOE	05/17/1972
Select One	JOHN M DOE	08/23/1975
Select One	JESSICA S DOE	02/03/2005
Select One	JOSEPH T DOE	11/30/2008

RPP Enrollment is temporarily unavailable. Please submit application via RSC or Paper.

Enroll in Medicare is only available in IL, NM, OK and TX

