
PARTICIPANT ACCOUNT
(MEMBER SELF-SERVICE) OR MSS
Enrollment Wizard
TUTORIAL

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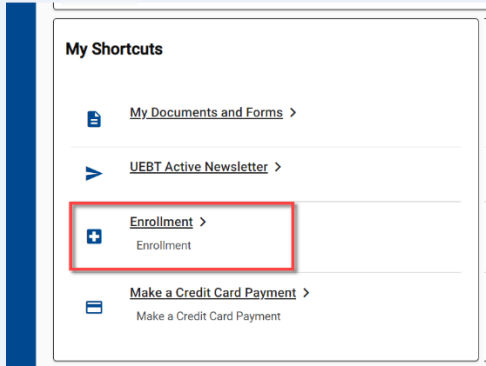
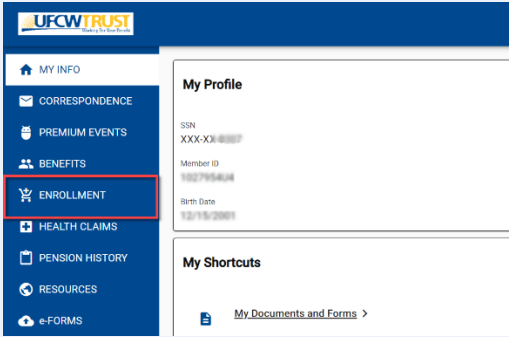
About the Enrollment Wizard

The MSS Enrollment Wizard provides the TFO members the option to enroll themselves and their dependents through a New Hire event, Open Enrollment event, or an Annual Verification event. Members can also use the Enrollment wizard to make life event changes, such as a birth, marriage, divorce, move out of state, and more.

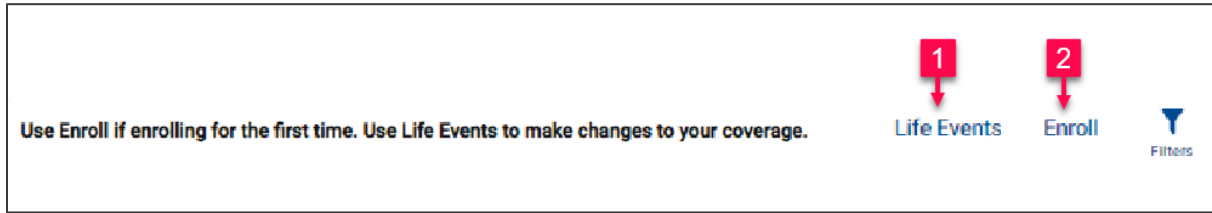
Once an event has been completed, members can view their enrollment confirmation documents and upload any required documentation so that their enrollment can be approved.

Accessing the Enrollment Wizard

To access the Enrollment Wizard, you first need to access the Enrollment page. This can be accessed through the Member Self-Service (MSS) portal from two locations: **My Shortcuts** and the **Enrollment tab**.

<p>My Shortcuts</p> <ol style="list-style-type: none"> 1. Log in to MSS. 2. Select My Info. 3. In the My Shortcuts section of the My Info tab, click Enrollment. 	
<p>Enrollment Tab</p> <ol style="list-style-type: none"> 1. Log in to MSS. 2. Select Enrollment from the side navigation bar. 	

Once you have accessed the Enrollment page, you can access the Enrollment Wizard by selecting *Enroll* or *Life Events* from the top right of the Enrollment page:



NOTE	If you are enrolling for the first time, you will <u>ONLY</u> see the Enroll option. The Life Events option only appears after you have completed your first enrollment.
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To enroll for the first time:

1. From the Enrollment window, click **Enroll** from the top of the page. You will be presented with the Welcome to Benefits Enrollment page.
2. Click **Next**.
3. On the Select an Event page,
 - a. If you are a new hire, or if this is your initial enrollment, select **New Hire/Initial Enrollment**.
 - b. If you were unable to complete Open Enrollment and you are not a New Hire, you will need to select **Annual Verification**.

To make changes to an existing event:

1. From the Enrollment window, click **Life Events** from the top of the page. You will be presented with the Welcome to Benefits Enrollment page.
2. Click **Next**.
3. At this point, the events presented on the Select an Event page differ from the initial enrollment option. You will be prompted to select the event type to make a change, such as you may have gotten married, had a baby, or perhaps your spouse or child lost insurance at their current or former employer and you need to add them to your insurance. Whichever event type you select, it will need to meet plan rules and be a qualifying Life Event.

Note	This tutorial will walk the member through a new enrollment, but this tutorial will be helpful whether making changes to an existing record or enrolling for the first time.
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Using the Enrollment Wizard

The Enrollment Wizard has 11 steps to guide you through the Enrollment process, whether you are enrolling for the first time or making changes to your existing enrollment event. These steps are described in the following sections of this tutorial:

WELCOME	5
SELECT AN EVENT	5
MEMBER-DEPENDENT INFO.....	6
POLICY SELECTION	7
SPECIFY PLAN DETAILS	7
SELECT A TIER	8
SELECT COVERED PERSONS.....	8
SELECT COVERAGE AND OTHER INSURANCE INFORMATION	9
DISCLAIMER.....	10
CONFIRMATION.....	10

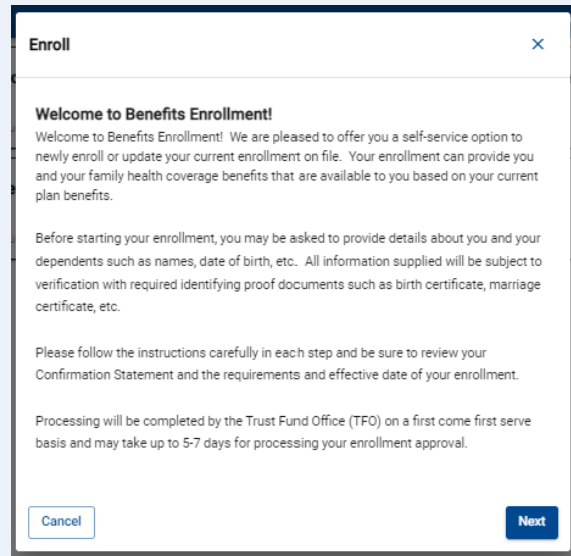
Welcome

After launching the Enrollment Wizard, you are presented with the Welcome to Benefits Enrollment page (shown below).

1. As stated on this page, during enrollment, you may be asked to provide details about you and your dependents such as names, date of birth, social security number, and so on. Please have this information before you begin.

All information supplied will be subject to verification with required identifying proof documents such as birth certificate, marriage certificate, and so on.

2. After reviewing the information, if you are ready to begin, click **Next**.



The screenshot shows a window titled "Enroll" with a close button (X) in the top right corner. The main content area contains the following text:

Welcome to Benefits Enrollment!
Welcome to Benefits Enrollment! We are pleased to offer you a self-service option to newly enroll or update your current enrollment on file. Your enrollment can provide you and your family health coverage benefits that are available to you based on your current plan benefits.

Before starting your enrollment, you may be asked to provide details about you and your dependents such as names, date of birth, etc. All information supplied will be subject to verification with required identifying proof documents such as birth certificate, marriage certificate, etc.

Please follow the instructions carefully in each step and be sure to review your Confirmation Statement and the requirements and effective date of your enrollment.

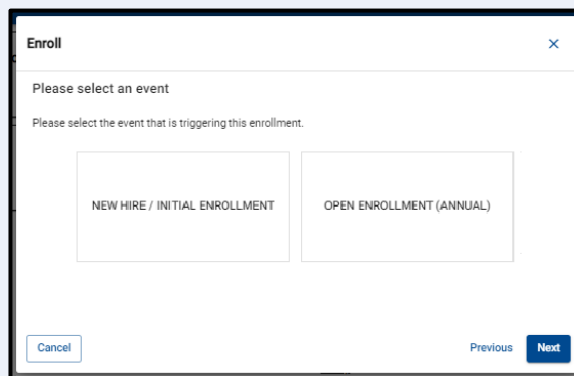
Processing will be completed by the Trust Fund Office (TFO) on a first come first serve basis and may take up to 5-7 days for processing your enrollment approval.

At the bottom of the window, there are two buttons: "Cancel" on the left and "Next" on the right.

Select an Event

On this page you are prompted to select enrollment event type. The events shown in this tutorial is a *New Hire/Initial Enrollment* and *Open Enrollment*. However, the events that will be shown may change depending on different scenarios. For instance, the Open Enrollment option will only be shown during open enrollment season.

1. Select the event that is triggering this enrollment.
 - a. If you are a new hire, or if this is your initial enrollment, select **New Hire/Initial Enrollment**.
 - b. If you are enrolling during open enrollment, select **Open Enrollment**.
 - c. If you are not a New Hire nor is it Open Enrollment season, you will see



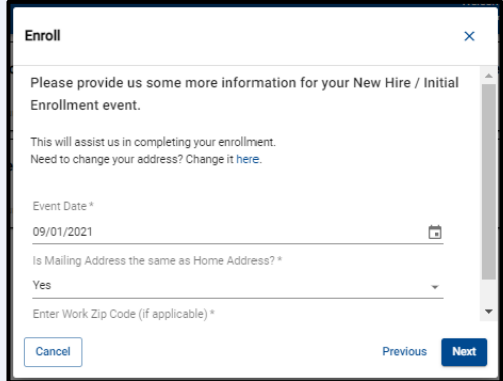
The screenshot shows a window titled "Enroll" with a close button (X) in the top right corner. The main content area contains the following text:

Please select an event

Please select the event that is triggering this enrollment.

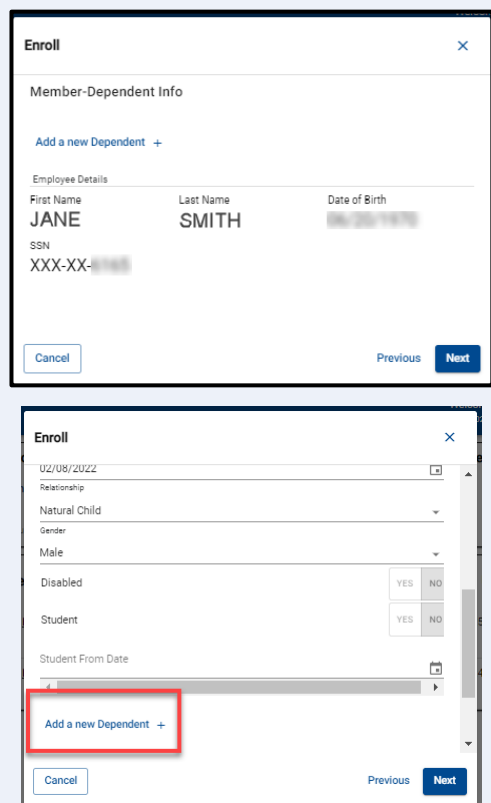
Below the text, there are two buttons: "NEW HIRE / INITIAL ENROLLMENT" on the left and "OPEN ENROLLMENT (ANNUAL)" on the right.

At the bottom of the window, there are three buttons: "Cancel" on the left, "Previous" in the middle, and "Next" on the right.

<p>Annual Verification. Please use this event type.</p> <p>2. Click Next.</p>	
<p>3. For a New Hire event the Event Date field shows your hire date. If needed, you can enter a different date.</p> <p>4. Answer any further questions and click Next. The Member-Dependent info page is displayed.</p>	

Member-Dependent Info

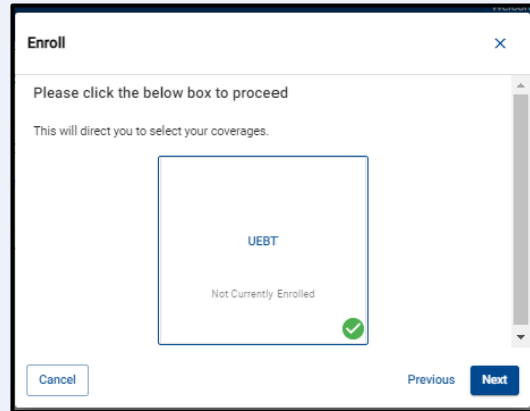
On the Member-Dependent Info page, you are presented with the high-level information regarding the member and any dependents attached you may have. Please review the existing dependents carefully, prior to adding a new member.

<p>1. If you are adding a dependent, click the Add a new Dependent + link. This will only be available if the event you are completing allows you to add new dependents.</p> <p>2. Complete the New Dependent sheet. HINT: Be sure to check that your available dependent is not previously listed.</p> <p>3. If you need to add multiple dependents, click Add a new Dependent + before continuing.</p> <p>4. When all dependents have been added, click Next.</p>	
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Policy Selection

This page is used to select the policy coverage. The *policy* shown here is UEBT.

1. Click the box in the center of the page.
2. Click **Next**.
HINT: If this is an Open Enrollment event, you will see an option for Express Open Enrollment after you check the policy coverage box.

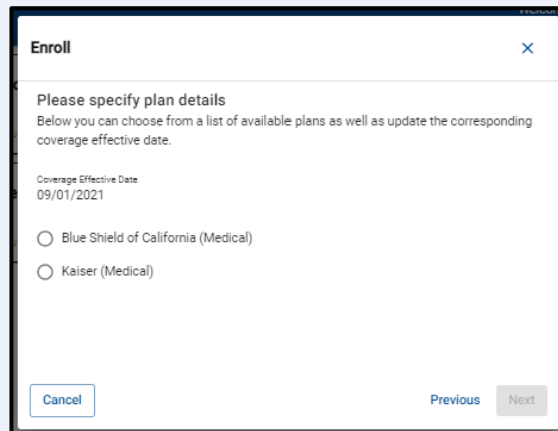


The screenshot shows a dialog box titled "Enroll" with a close button (X) in the top right corner. The main text reads: "Please click the below box to proceed" and "This will direct you to select your coverages." In the center, there is a box containing the text "UEBT" and "Not Currently Enrolled" with a green checkmark icon to the right. At the bottom left is a "Cancel" button, and at the bottom right are "Previous" and "Next" buttons.

Specify Plan Details

On this page, you will select the plan in which you want to enroll. Note that if you only meet a single plan, only that plan will display. For instance, if you live outside of the Kaiser coverage area, then Kaiser will not be displayed.

1. Select the plan that best suits your needs.
2. Click **Next**.
HINT: Some events will not allow carrier changes and therefore, these options may be grayed out.

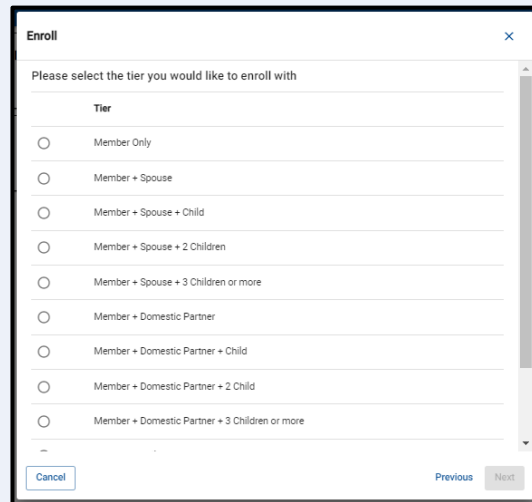


The screenshot shows a dialog box titled "Enroll" with a close button (X) in the top right corner. The main text reads: "Please specify plan details" and "Below you can choose from a list of available plans as well as update the corresponding coverage effective date." Below this, it shows "Coverage Effective Date" as "09/01/2021". There are two radio button options: "Blue Shield of California (Medical)" and "Kaiser (Medical)". At the bottom left is a "Cancel" button, and at the bottom right are "Previous" and "Next" buttons.

Select a Tier

Here you need to select the specific tier that fits your policy. For instance, if you added your spouse and child, then you would select the tier *Member + Spouse + Child*. Your tier must match the covered persons selected in the next step.

1. Review each tier description, carefully.
2. Select the tier that best suits your needs.
3. Click **Next**.



The screenshot shows a modal window titled "Enroll" with a close button (X) in the top right corner. Below the title is the instruction "Please select the tier you would like to enroll with". A list of tiers follows, each with a radio button:

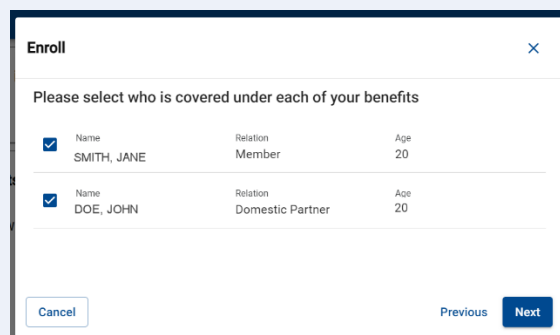
- Member Only
- Member + Spouse
- Member + Spouse + Child
- Member + Spouse + 2 Children
- Member + Spouse + 3 Children or more
- Member + Domestic Partner
- Member + Domestic Partner + Child
- Member + Domestic Partner + 2 Child
- Member + Domestic Partner + 3 Children or more

At the bottom of the modal are three buttons: "Cancel" on the left, "Previous" in the center, and "Next" on the right.

Select Covered Persons

This page lists your name along with anyone you have added to the policy. The selected covered persons must match the tier you selected in the previous step.

1. Review the list and ensure that the checkbox is marked for all those you want to be covered under your policy.
2. Click **Next**.
HINT: If your selected person is not able to be added based on plan rules, they may not appear on this screen.



The screenshot shows a modal window titled "Enroll" with a close button (X) in the top right corner. Below the title is the instruction "Please select who is covered under each of your benefits". A table lists covered persons with checkboxes:

	Name	Relation	Age
<input checked="" type="checkbox"/>	SMITH, JANE	Member	20
<input checked="" type="checkbox"/>	DOE, JOHN	Domestic Partner	20

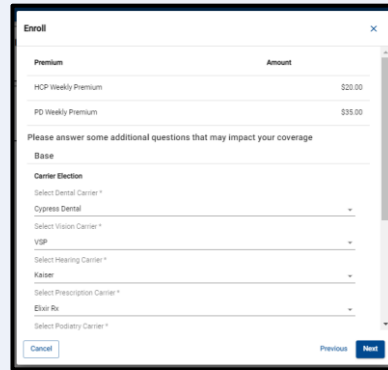
At the bottom of the modal are three buttons: "Cancel" on the left, "Previous" in the center, and "Next" on the right.

Note: If you select "Member Only" in the previous step, this step will be skipped.

Select Coverage and Other Insurance Information

On this page, your premiums and carrier options are displayed, and you are prompted to choose which carrier you prefer for your dental. Vision, hearing and prescription carriers auto-populate to the default carrier. You will then be prompted to answer your Other Insurance Information (OII) questions.

1. Review the carrier election options.
You may have the option to select a different Dental plan.
2. Use the dropdown list and select the Dental **carrier of choice**, if applicable.
3. The final section of this page is **“Other Insurance Information”**. This section asks if you have other insurance. For instance, if you are married and your spouse has insurance coverage from their employer.
4. If the answer is “Yes”, you will be presented with more fields where you will need to provide the details on their insurance coverage.
5. Complete that section, if required.
6. When ready, click **Next**.



Premium	Amount
HCP Weekly Premium	\$20.00
PD Weekly Premium	\$35.00

Please answer some additional questions that may impact your coverage

Base

Carrier Election

Select Dental Carrier *
Cypress Dental

Select Vision Carrier *

VIP

Select Hearing Carrier *

Kaiser

Select Prescription Carrier *

Elvir Rx

Select Prosthetic Carrier *

Cancel Previous Next



Select Prescription Carrier *

Elvir Rx

Select Prosthetic Carrier *

Cancel Previous Next

Other Insurance Information - Medical

Do you have a Spouse/Domestic Partner? *

Yes

Is the spouse/domestic partner/other parent going to cover the newborn child?

Yes

Is your Spouse/Domestic Partner employed?

Yes

Is your Spouse/Domestic Partner offered any health coverage (select one)?

5. Yes, they have other health coverage.

Does anyone now being covered, including yourself, have other insurance to report? *

Yes

Policy Type

Employer Name

Other Type

Other



Other Insurance Information - Medical

Do you have a Spouse/Domestic Partner? *

Yes

Is the spouse/domestic partner/other parent going to cover the newborn child?

Yes

Is your Spouse/Domestic Partner employed?

Yes

Is your Spouse/Domestic Partner offered any health coverage (select one)?

5. Yes, they have other health coverage.

Does anyone now being covered, including yourself, have other insurance to report? *

Yes

Policy Type

Employer Name

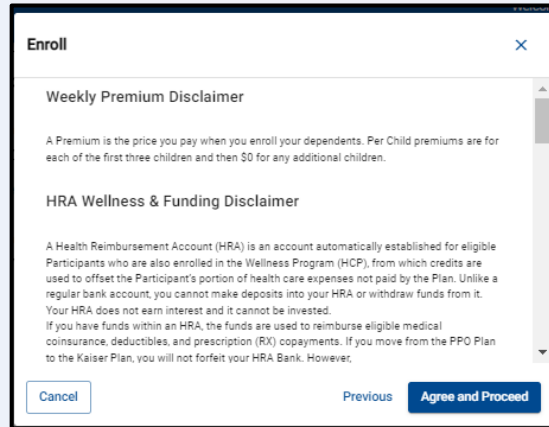
Other Type

Other

Disclaimer

This page lists the disclaimer details you need to know before completing your enrollment.

1. Review each section of the Disclaimer page.
 2. Scroll down and then click **Agree and Proceed** to continue.
- HINT:** Some disclaimers may not apply to your scenario. These disclaimers are general in nature.



Enroll

Weekly Premium Disclaimer

A Premium is the price you pay when you enroll your dependents. Per Child premiums are for each of the first three children and then \$0 for any additional children.

HRA Wellness & Funding Disclaimer

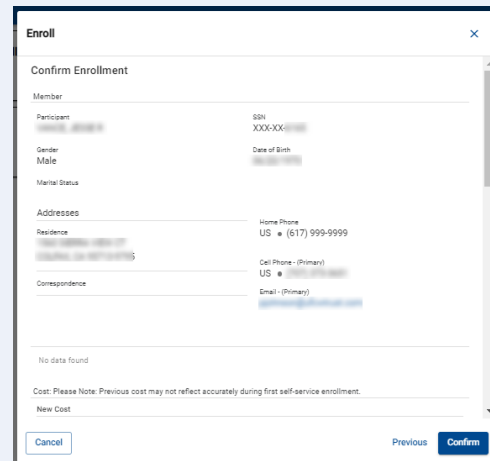
A Health Reimbursement Account (HRA) is an account automatically established for eligible Participants who are also enrolled in the Wellness Program (HCP), from which credits are used to offset the Participant's portion of health care expenses not paid by the Plan. Unlike a regular bank account, you cannot make deposits into your HRA or withdraw funds from it. Your HRA does not earn interest and it cannot be invested. If you have funds within an HRA, the funds are used to reimburse eligible medical coinsurance, deductibles, and prescription (RX) copayments. If you move from the PPO Plan to the Kaiser Plan, you will not forfeit your HRA Bank. However,

Cancel Previous **Agree and Proceed**

Confirmation

The details you just selected, and all other enrollment information is provided here.

1. Review the details of your enrollment.
 2. Click **Confirm** to complete the enrollment.
- You are returned to the Enrollment option (see image below). If your enrollment was approved, it will show in the Status column. If more information is needed, the status will show as Submitted and the Upload Documents button will display for any required documentation.



Enroll

Confirm Enrollment

Member

Participant: [Redacted] SSN: XXX-XX-XXXX

Gender: Male Date of Birth: [Redacted]

Marital Status: [Redacted]

Addresses

Residence: [Redacted] Home Phone: US • (617) 999-9999

Correspondence: [Redacted] Cell Phone - (Primary): [Redacted] Email - (Primary): [Redacted]

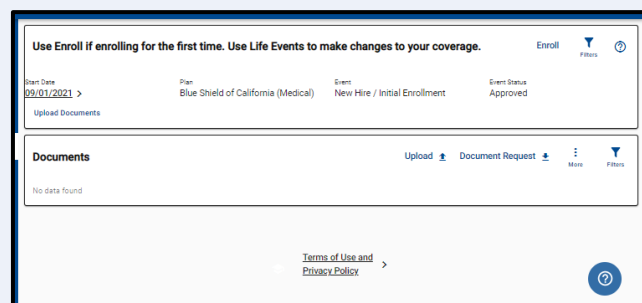
No data found

Cost: Please Note: Previous cost may not reflect accurately during first self-service enrollment.

New Cost

Cancel Previous **Confirm**

HINT: Enrollments may take up to 72 hours to be processed from receipt of all required proof documents. Enrollments will be processed first come first serve. Auto-approved enrollments can be seen instantly by refreshing your web browser page.



Use Enroll if enrolling for the first time. Use Life Events to make changes to your coverage.

Enroll Filters

Start Date	Plan	Event	Event Status
09/01/2021	Blue Shield of California (Medical)	New Hire / Initial Enrollment	Approved

Upload Documents

Documents Upload Document Request More Filters

No data found

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