Enrollment and Billing

SUPPORT FORM PROCESS

Tips on how to use the process

The purpose of this Web based form is to streamline all of your Membership and Billing inquiries and requests. By submitting your inquiries and requests via this form, they are securely transmitted directly to the request management system that is utilized to assign and process requests within our Membership and Billing department.

Enhanced Security

You will need to authenticate by logging in prior to using the Enrollment and Billing Support Form. After authentication, users may submit requests for multiple accounts under the same secure session. The form itself utilizes Secure Sockets Layer technology (the industry standard for secure transactions) to transmit the information to our request management system.

Completing the Form

All appropriate paperwork must accompany the request, and required fields must be completed. If retroactive review is required, please reference the Retroactive Process Tip Sheet and include a completed Exception Request Form.

Attach your documentation. Depending on the browser and version being used, attachment functionality may vary slightly. Web browsers such as Google Chrome allow multiple attachments to be submitted on the same request. Certain versions of Internet Explorer only allow one attachment.

The most common reason for an inquiry is likely to be a question regarding a Subscriber/Member. This reason for inquiry should be chosen for subscriber/member activity, new enrollments, and member additions to an existing contract, changes, terminations, etc. If a subscriber name and/or ID number does not exist yet, key "NA" the subscriber name and ID number fields.

Attaching eFile, Spreadsheets, Rosters, etc.

Capability has been added to the tool to allow attachments to be sent via the secure automated emails that are sent to the requestor. With this capability, Membership is able to send copies of bills, updated spreadsheets, and temporary ID cards in urgent situations. Users may also attach spreadsheets in the eFile format to their request for enrollment processing.

Tracking System and Notifications

You will be notified when your inquiry is received (Web pop-up message), assigned (secure email) and completed (secure email). The secure email you receive with your tracking number now contains specific information about the inquiry. For example, on a Subscriber/Member request, the email will contain the company name, group number(s), broker name, subscriber name and subscriber ID as entered in the request.

Each notification will contain a membership inquiry request number. This number is used for tracking purposes. If you have any questions concerning a specific inquiry, please contact your account service consultant or dedicated support line with this reference tracking number.

If your inquiry does not contain the necessary information to complete the request, it will be closed without any action taken. Requests that are closed by Membership with a status of "Closed No Action Taken" will generate an email to the requestor indicating what information is needed in order to process the transaction. A subsequent request will need to be filled out with all of the necessary information. In order to prevent any enrollment delays, it is very important that the initial request contains all required information. Please be sure that all selected attachments are present on the request prior to clicking the submit button.

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B-5212 / 9820-15 MO

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