

# Employer Quick Start Guide



**BlueCross BlueShield of Oklahoma**

*Experience. Wellness. Everywhere.®*





# Table of Contents

Getting Started .....	1
Security Manager Tool .....	2
Enrolling Employees .....	3
Enrolling Dependents .....	4
Canceling Employees or Dependents.....	4
Requesting/Printing ID Cards .....	5
Maintenance Activity/Billing .....	6
Online Bill Payment.....	7
Paying Your Bill.....	8
Virtual Help Center.....	9

Welcome to the Blue Cross and Blue Shield of Oklahoma (BCBSOK) Blue Access® for Employers (BAE) Quick Start Guide. This guide will get you up and running with your new health plan quickly.

Registration Step 1 of 2

Enter the account number, employer's name and headquarters location information from your BCBS contract while registering. All fields are required.

Account Number:

Employer Name:

City:

State:

Zip Code:

Registration Step 2 of 2

Your User ID begins with your 6-digit account number. Create a User ID of up to 20 characters.

User ID:  (Example: smiths)

First Name:

Last Name:

Phone Number:

E-Mail Address:

Verify E-Mail Address:

## Getting Started with BAE

1. Go to [www.bcbsok.com/employer](http://www.bcbsok.com/employer) and click **Learn how to register**.
2. Enter the following information and click **Next**:
  - Six-digit account number
  - Employer name
  - City, state and ZIP code
3. Enter the following information and click **Submit**:
  - User ID
  - Your name
  - Business phone number
  - Business e-mail address
4. A confirmation message will appear and a temporary password will be sent to the business e-mail address entered. If you do not receive an e-mail, please contact your BCBSOK representative.



## Security Manager Tool

Enables the Delegated Administrator to:

- A. Search for users based on name or permissions
- B. Add, revoke, or maintain users' access
- C. Assign specific security permissions
- D. Designate an alternate administrator

The screenshot shows the 'Account Summary - Security Manager' interface for 'Demo Company'. It features tabs for 'Current Users', 'Add Users', 'Broker Access', and 'EOB Access'. Below the tabs are links for 'Search', 'Maintain User', and 'Reset Password'. The 'User Profile Information' section includes fields for 'User ID' (with 'DEMO.' prefix), 'Last Name', 'First Name', and 'Status' (set to 'Active'). There are also expandable sections for 'Permissions' and 'Characteristics', and a 'Find' button at the bottom.

To access the Security Manager tool, click on the Security Manager link at the top right-hand side of the homepage or in the left-hand navigation under Account Summary.

This screenshot shows the 'Add Users' section of the Security Manager tool. It includes a list of instructions for adding users manually or via a file, and a note about User ID formatting. Below the instructions are links for 'Excel Template' and 'Text Template', and a checkbox for 'Automatically generate User Ids'. A table with columns for 'Delete', 'First Name', 'Last Name', 'E-mail', 'Verify E-mail', 'Phone', and 'User ID' is shown, with one row containing a 'DEMO.' prefix. At the bottom, there are 'Add Rows' and 'Load File' buttons, and a 'Permissions' section with checkboxes for 'Membership' and 'Reporting' options.

Delete	First Name	Last Name	E-mail	Verify E-mail	Phone	User ID
<input type="checkbox"/>						DEMO.



## Enrolling Employees

1. On the BAE home page, click the **Enroll Employee** button in the middle of the page.

The screenshot shows the BlueCross BlueShield of Oklahoma 'blueaccess' portal. The header includes the logo and 'blueaccess' branding. The main content area is divided into several sections:

- Employer Home:** A sidebar menu with links for Account Summary, Enrollment, Employee Maintenance, and Billing.
- Account Summary:** Displays account details for 'Demo Company', including Account # DEMO, Effective Date 01/01/2003, and Renewal Date 01/01/2010.
- Employee Maintenance:** A section with a dropdown menu for 'I want to:' and a 'Get Started' form. The form has radio buttons for 'Employee' and 'Dependent', and fields for SSN or ID Number, Last Name, and First Name. A blue 'Enroll Employee' button is visible.
- Recent Activity:** A table showing recent actions:

Name	ID Number	Activity	Entry Date	Status
BURK, JOHN	999999990	Employee Add	09/20/2010	Complete
BANKS, JANET	932132132	Employee Add	09/20/2010	Finish Later
WILLIAMSON,	999999996	Product	09/20/2010	Finish Later

Other sections include 'View Your Recent Activities!', 'Employer Resources', and 'HELP DESK: (888) 705-0583'.

2. Read the enrollment process description.  
To bypass this screen in the future, select the **Skip this screen in the future** check box.
3. Click the **Enroll Now** button.
4. Enter the employee's information on each screen presented.
5. Click the **Confirm** button on the Review and Confirm screen.

The screenshot shows the 'Enroll Employee - Introduction' screen. It features a yellow header and a light blue background. The main content includes:

- Introduction to the Enrollment Process:** A paragraph explaining that the following pages will allow employers to begin the process of enrolling new employees and dependents into various types of coverage offered by Blue Cross Blue Shield of Oklahoma. It notes that data is captured in a way that maximizes efficiency by displaying only relevant screens.
- Skip this screen in the future:** A checkbox option with the text: "If you choose to skip this screen in the future, you can download the [Enrollment Process Overview](#) from the [Help Center](#)."
- Enroll Now:** A blue button at the bottom of the section.

## ▶ Enrolling Dependents

1. On the BAE home page, select the **Add Dependent** option from the **I want to** drop-down menu.
2. Select the **Employee** radio button.
3. Enter the employee's Social Security number/ID number or last name.
4. Click the **Find** button.
5. Click the employee's name in the Search Results table to be taken to the Add Dependent screen.
6. Follow the instructions on the screen.
7. When done, click the **Submit** button on the Review and Confirm screen.

The screenshot shows the 'Account Summary' for 'Demo Company'. It includes links for 'View Details', 'View Health Plans', and 'Update Profile'. The account information shows 'Account #: DEMO', 'Effective Date: 01/01/2001', and 'Renewal Date: 01/01/2010'. Below this is the 'Employee Maintenance' section with a dropdown menu set to 'Add Dependent'. The 'Add Dependent' form has two radio buttons: 'Employee' (selected) and 'Dependent'. It contains input fields for 'SSN or ID Number', 'Last Name', and 'First Name', with an 'OR' label between the SSN and Last Name fields. A 'Find' button is located below the input fields. To the left of the form, there is a section titled 'Add Dependent' with instructions: 'To add a new dependent, you will need: 1. The dependent's personal information including SSN, date of birth, and relationship to the employee. 2. Reason for enrolling (birth, marriage, etc.) and the event date.'

## ▶ Canceling Employees or Dependents

1. On the BAE home page, select the **Cancel Employee/Dependent** option from the **I want to** drop-down menu.
2. Select the **Employee** or **Dependent** radio button as appropriate.
3. Enter the employee's or dependent's Social Security number/ID number or last name.
4. Click the **Find** button.
5. Click the employee's or dependent's name in the Search Results table to be taken to the Cancel Employee/Dependent screen.

6. Follow the instructions on the screen.
7. When done, click the **Submit** button.

**Tip:** Enter the cancel date as the first day without coverage unless otherwise specified in the account's membership guidelines.



## Order Replacement and Temporary ID Cards

1. On the BAE home page, select the **Request/Print ID Card** option from the **I want to** drop-down menu.
2. Select the **Employee** or **Dependent** radio button as appropriate.
3. Enter the employee or dependent's Social Security number/ID number or last name.
4. Click the **Find** button.
5. Click the employee's or dependent's name in the Search Results table to be taken to the Request/Print ID Card screen.
6. Select the type of card needed.
7. Click the **Submit** button
8. You will also see an option to Print a Temporary ID card.

This maintenance tool will allow you to perform a number of transactions. For example, you can:

- Reinstatement employees/dependents (with or without a gap in coverage)
- Change benefit plans
- Update personal details
- Update HIPAA certificate
- Complete COBRA enrollments

The screenshot displays the 'Employee Maintenance' interface. At the top, there is an 'Account Summary' section for 'Demo Company' with details: Account #: DEMO, Effective Date: 01/01/2001, and Renewal Date: 01/01/2010. Below this are links for 'View Details', 'View Health Plans', and 'Update Profile'. The main section is titled 'Employee Maintenance' and features a dropdown menu labeled 'I want to:' set to 'Request/Print ID Card'. Underneath, there is a 'Request/Print ID Card' section with instructions: 1. Request a new ID card to be mailed to the employee's home or an alternate address. 2. Print a temporary ID card. To the right, there is a 'Find an Employee/Dependent' section with radio buttons for 'Employee' (selected) and 'Dependent'. It includes input fields for 'SSN or ID Number', 'Last Name', and 'First Name', with an 'OR' separator between the SSN and Last Name fields. A blue 'Find' button is located at the bottom of this section.



## Maintenance Activity

### Recent Activity

The Recent Activity screen displays a list of activities performed by the group. A user is able to view their five most recent activities in this list. The search is limited to activities that have occurred within the past 30 days.

### To view a complete list of activities performed:

On the homepage, click on the **View All** button in the Recent Activity section. You will be taken to the Maintenance History screen where you can search for transactions by Date, SSN/ID Number, User or Status. This page will display up to 100 transactions at one time.

**Recent Activity**

Name	ID Number	Activity	Entry Date	Status
<a href="#">BURK, JOHN</a>	999999998	Employee Add	08/25/2010	Complete
<a href="#">BANKS, JANET</a>	932132132	Employee Add	08/25/2010	<a href="#">Finish Later</a>
<a href="#">WILLIAMSON, CRAIG</a>	999999996	Product Correction	08/25/2010	<a href="#">Finish Later</a>

[View All](#)

**Employee Maintenance - Maintenance History**

Please enter at least one search criteria to view maintenance activity.

\* From:  To:

SSN or ID Number:

User:

Status:

**Search Results**

Name	ID Number	Activity	Delete Activity	Entry Date	Status	User
<a href="#">BURK, JOHN</a>	999999998	Employee Add		08/25/2010	Complete	Test User
<a href="#">BANKS, JANET</a>	932132132	Employee Add	<a href="#">DELETE</a>	08/25/2010	<a href="#">Finish Later</a>	Test User
<a href="#">WILLIAMSON, CRAIG</a>	999999996	Product Correction	<a href="#">DELETE</a>	08/25/2010	<a href="#">Finish Later</a>	Test User

## Billing

### Premium Bills

Premium billed accounts can view/download their monthly bill.

### ASO Invoices

ASO accounts can view their Weekly Invoice or Monthly Settlement.

**Premium Bills - Bill Summary**

Bill Profile:

Bill Period: 03/01/2010-04/01/2010 Rebill: NO ProcessDate: 03/15/2010

I want to view:

[Print Bill Summary](#)

Download:

Excel  Text

Charges		Amount Due
Current Employee Charges		\$1,690.61
Employee Fee Adjustments		\$459.00
<b>Total Charges</b>		<b>\$2,149.61</b>
<b>Payment Due Date</b> 04/01/2010	<b>Total Amount Due</b>	<b>\$4,712.44</b>

**Invoices - Invoice Summary**

Invoice ID:

Invoice Period: 03/16/2010 - 03/26/2010 Process Date: 03/26/2010

I want to view:

**Invoice Summary**

Invoice Summary displays the weekly amount owed for claims paid by Blue Cross Blue Shield for the selected week.

**WEEKLY**  
 Customer: DEMO ACCOUNT  
 Contact: John Doe  
 Bill To: DEMO ACCOUNT  
 615 N. FINLEY AVE  
 Suite 100  
 CHICAGO, IL 60615

Invoice Date: 03/16/2010





## Online Bill Payment

### Getting Started

You are eligible to use Online Bill Payment if you are a premium billed account or if you are an ASO account that receives weekly, biweekly, or semi-monthly invoices on Blue Access for Employers.

1. Click **Billing** in the left menu bar on the home page.
2. Click **Online Payments**.
3. Select **Add New Bank Account Profile** from the **I want to** drop-down menu.
4. Click **Go**.
5. Read and accept the Terms of Use Agreement (first time only).
6. Enter the information requested on the form and click **Save**.

**NOTE:** The effective date is the first date that online payments may be made. This field is pre-filled with a date that is 10 calendar days in the future to allow time to validate the banking information submitted before making the first online payment.

Only invoices generated after the 10-day validation period are eligible for payment online.



## Paying Your Bill

1. Click **Billing** in the left menu bar on the home page.
2. Click **Online Payments**.
3. Select **Pay Bills** from the **I want to** drop-down menu and click **Go**.
4. Select a **Bill Profile** (if necessary) to pay from the drop-down menu.
5. The amount due for the bill is displayed in the **Pay This Amount** field.
6. Review the amount and click the **Continue** button.
7. Confirm the **Bill Profile(s)** to pay.
8. Click **Submit** to process. A confirmation screen will display.

The screenshot shows a web interface titled "Online Payments - View Online Bill Payment Home Page". It features a yellow header bar. Below the header, there is a light blue area with a "Welcome" button on the left and a "payment" label on the right. The main content area is white and contains a form with the label "I want to:" followed by a dropdown menu. The dropdown menu is open, showing a list of options: "Pay Bills", "View Online Bill Payment Home Page", "Add New Bank Account Profile", "Modify Bank Account Profile", "Update Payments", "Track Payments", "View Terms Of Use", and "Discontinue Online Bill Payment". The "Pay Bills" option is highlighted in blue. To the right of the dropdown menu is a blue "GO" button.



## Refer to the Employer Reference Guide for additional details on how to:

- Add a new bank account profile
- Modify a bank account profile
- Pay bills
- Update payments
- Track payments
- View Terms of Use
- Discontinue online bill payment



## Virtual Help Center

**Help Center**

**FAQs** | **Glossary** | **Site Map** | **Training Center**

[General BAE Information](#) | [Online Payments](#)  
[Delegated Administrator and Assigning Roles](#) | [COBRA](#)  
[Enrollment Information](#)

**General BAE Information**

1. [What is Blue Access for Employers?](#)
2. [When is Blue Access for Employers available?](#)
3. [Where can I find step-by-step instructions to perform functions available in Blue Access Employers?](#)
4. [If I need further assistance with online tools, who should I contact?](#)
5. [Why did my session time out?](#)
6. [How is my account and payment information secured?](#)

**What is Blue Access for Employers?**

Blue Access for Employers (BAE) is a secure Web site that allows employer clients to quickly and accurately perform online transactions for a variety of enrollment, membership, administrative and reporting activities. Information can be verified and edited, and changes that impact billing are recorded immediately and reflected in the next billing cycle.

Our virtual Help Center contains several ways for you to get helpful information and instructions for all our online tools and functions:

- Variety of FAQs
- Easy-to-use glossary
- Concise site map
- Comprehensive training center

---

### Blue Access for Employers (BAE) Services Help Desk: 888-706-0583

Monday–Friday 7 a.m. to 10 p.m. CT

Saturday 7 a.m. to 3:30 p.m. CT

For faster service, please provide error codes. Holiday availability may vary.

Downloadable claim and membership maintenance forms are available at [www.cbcsok.com/employer/downloadableforms.htm](http://www.cbcsok.com/employer/downloadableforms.htm).



**BlueCross BlueShield of Oklahoma**

*Experience. Wellness. Everywhere.®*

[www.bcbsok.com/employer](http://www.bcbsok.com/employer)