



# One Source: How to complete a benefit change

## 1. Login to the OneSource dashboard.

WELCOME TO BLUE CROSS BLUE SHIELD OF MICHIGAN MANAGING AGENT COMMUNITY!

**MY DASHBOARD**  
As of May 19, 2021, 9:34 AM Viewing as Julie O'Neill

**Accounts Report**  
Record Count: 9.5k  
Account Status: Active

**Agent Support Requests Report**  
Record Count: 152  
Status: In Progress

**ACTIONS:**  
 Launch New Business Quote  
 Launch New Support Request

What do you want to do today?  
 Quote New Business  
 Enroll an Account  
 Quote Existing Business  
 Group Wide Change  
 Group Maintenance  
 I'll use Instant Guidance later.

## 2. Enter the customer ID. Click "Search."

288

SEARCH



### 3. Click on “Instant Guidance.”

Quote  
MIDEASTERN MICHIGAN LIB-Quote-AQ

ACTIONS

Enrollment Document Generation Alternate Quote Group Wide Changes

DETAILS RELATED

Quote Number 00041766	Quote Name MIDEASTERN MICHIGAN LIB-Quote-AQ
Agent Name HARVEY L LEE	Account Name MIDEASTERN MICHIGAN LIB
Quote Status Information	Requested Effective Date 5/1/2021
Quote Status Active	Requested Renewal Month May 1st
FTEs 0	Requested Renewal Date 5/1/2021
Expected Active Enrolling	
Days from Effective Date 68	

Contribution Type

### 4. Click “Help me with a GWC.”

Blue Cross Blue Shield of Michigan

How can we help you?

? Help Things to do

Type in your question...

- Help me Enroll
- Help me Quote
- Help Me Quote Existing Business
- Help me with a GWC
- Help me with a Maintenance Change
- Open the Underwriting Rules

powered by uak



## 5. Click on "Group Wide Change."

The screenshot shows the TGG Solutions web application interface. At the top, there is a search bar and a user profile for HARVEY L... Below the navigation bar (HOME, MY ACCOUNTS, MY QUOTES, SUPPORT REQUEST, RENEWAL CONTRACTS, REPORTS), a quote for MIDEASTERN MICHIGAN LIB is displayed. A tooltip with the text "Click Group Wide Change To change the benefits for this Account." is visible. In the "ACTIONS" section, the "Group Wide Changes" button is highlighted with a red rectangular box. Below this, the "DETAILS" section shows quote information: Quote Number 00041766, Agent Name, Account Name MIDEASTERN MICHIGAN LIB, Quote Status Active, FTEs 0, Expected Active Enrolling, Days from Effective Date 68, Requested Effective Date 5/1/2021, Requested Renewal Month May 1st, and Requested Renewal Date 5/1/2021. At the bottom, there are fields for "Contribution Type" with "Dental Contribution Type" and "Vision Contribution Type" selected.

## 6. Enter the requested effective date.

The screenshot shows the "Account Information" form in the TGG Solutions web application. A tooltip with the text "Select the Requested Effective Date Then click Next at the bottom of the page." is visible. The "Requested Effective Date" dropdown menu is open, and "May 1 2021" is selected, highlighted with a red rectangular box. Other fields include: Account Name MIDEASTERN MICHIGAN LIB, Renewal Month May 1st, Physical Address 503 S SAGINAW ST #711, City FLINT, State MI, ZIP Code 48502, and County GENESEE. At the bottom, there are "Cancel" and "Save For Later" buttons.



7. Select products and click on “Next” to begin.

The screenshot shows the 'Product Selection' step in a multi-step process. A modal window is displayed with the following text:

**Product Selection**

On this page you can:

- Change the benefits assigned to current group segments
- Add a Benefit Package to an existing group segment
- Add a new group segment
- Choose to offer freestanding dental or vision

Let's take a tour!

A red box highlights the **NEXT** button at the bottom of the modal.

Below the modal, the 'Group Segment: 007016716\_0000' is shown with three columns of products:

Medical	Dental	Vision
Community Blue™ PPO Platinum 1	Blue Dental PPO Plus™ 100/80/50	Vision PPO Plus™ 80/50/50 Pedia

Buttons on the right include 'Add Benefit Package', 'Edit Group Segment', and 'Delete Group Segment'. A 'NEXT' button is also visible at the bottom right of the product list area.

8. Use the “Edit Group” button to update the new products for the group. Click “Next” to proceed.

The screenshot shows the 'Product Selection' step with an 'Edit Group Segment' modal window open. The modal contains the following text:

**Edit Group Segment**

Use the Edit Group button to update the product(s) offered to this group segment.

A red box highlights the **NEXT** button at the bottom right of the modal.

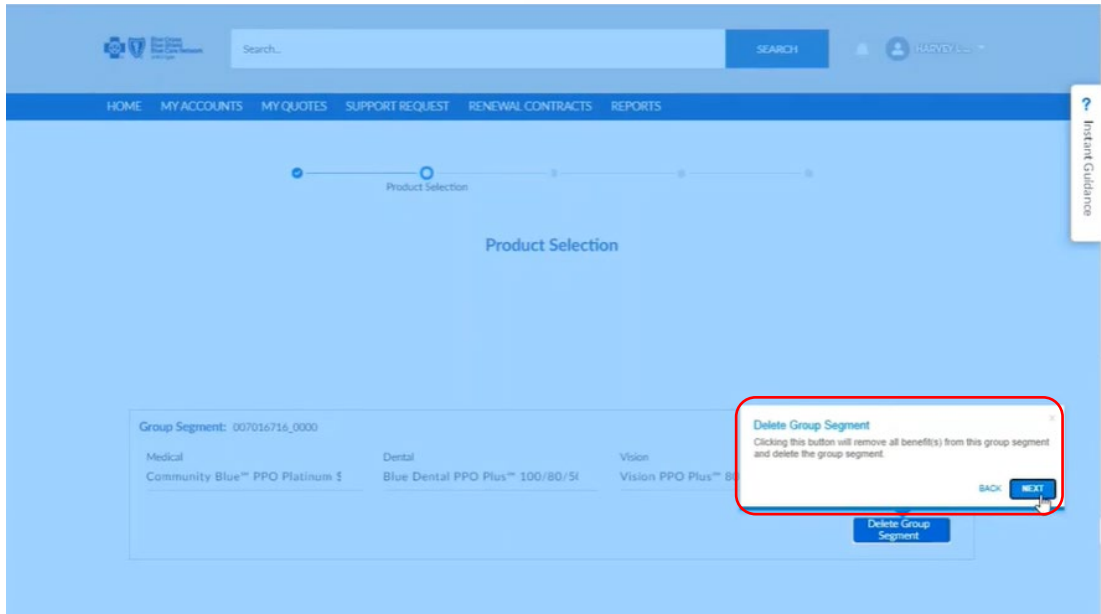
Below the modal, the 'Group Segment: 007016716\_0000' is shown with three columns of products:

Medical	Dental	Vision
Community Blue™ PPO Platinum 1	Blue Dental PPO Plus™ 100/80/50	Vision PPO Plus™ 80/50/50 Pedia

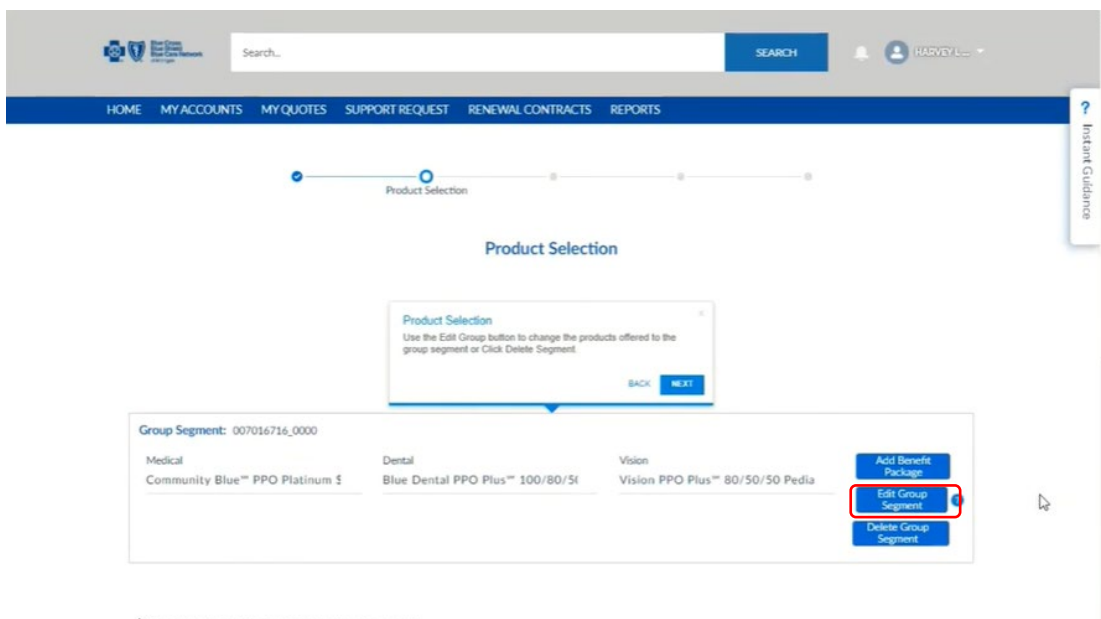
Buttons on the right include 'Edit Group Segment' and 'Delete Group Segment'. A 'NEXT' button is also visible at the bottom right of the product list area.



9. The “Delete” button will remove all benefits as well as group segment. Only click this if the intention is to delete the segment from the group.



10. Click “Edit Group Segment” to change the products offered in this segment. Click “Next.”





11. A drop down medical box will appear. Use this to change the group’s medical package or remove medical from the group. Continue to do this for dental and vision. Once all lines of coverage match the Part C agreement, click “Save Changes” and then “Next.”

12. Answer all questions and click “Next.”



13. Confirm the selections are correct on the Summary of Groupings page. Click “Next.” The product package will appear at the top of the screen for reference. Click “Next.” Note: Current products are listed in black font, the new products will display in blue font.

The screenshot shows the 'Product Package Selection' step of the 'Employee Census' process. A modal window titled 'Product Package Selection' is displayed, containing the text: 'Product Package(s) will display at the top of the screen for reference.' A red box highlights the 'NEXT' button in the bottom right corner of this modal. Below the modal, a table lists plan options:

	Medical Plan	Dental Plan	Vision Plan
GS-Package	Simply Blue™ HRA PPO Gold \$1500 (\$50)	Blue Dental™ PPO SG 80/50/50 (50/50/50)	Vision PPO Plus™ 80/50/50 Pediatric SG

A legend indicates that current products are in black font and newly quoted products are in blue font. An 'Add Employee' button is visible at the bottom right of the plan selection area.

14. Click on “Add Employees” to add any new employees to the plan. Click “Next.”

The screenshot shows the 'Employee Census' page. An 'Add Employee Button' modal is open, with the text: 'Click to add new employees.' A red box highlights the 'NEXT' button in the bottom right corner of this modal. The background shows the plan selection table from the previous step:

	Medical Plan	Dental Plan	Vision Plan
GS-Package	Simply Blue™ HRA PPO Gold \$1500 (\$50)	Blue Dental™ PPO SG 80/50/50 (50/50/50)	Vision PPO Plus™ 80/50/50 Pediatric SG

The legend and 'Add Employee' button are also visible in the background.



15. Confirm all employee fields are complete. Click “Next.” Verify the employee is in the correct group segment. Click “Next.” Once all lines of coverage have been verified for the employee, click “Save.”

**Employee Census**

Medical Plan: Simply Blue™ HRA PPO Gold \$1500 (\$50)  
 Dental Plan: Blue Dental™ PPO SG 80/50/50 (50/50/50)  
 Vision Plan: Vision PPO Plus™ 80/50/50 Pediatric SG

LEGEND  
 Current Product  
 Newly Quoted Product

**Add Employee**

Last Name	First Name	Gender	Birth Date	Relationship	Member Type	Status	Package*	CDH Selection	Medical	Dental	Vision
Employee 1											
lastname	IRENE		8/13/1959	Employee	Regular	Enrolling	GS-Packag		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee 2											
lastname	ERIC		11/16/1962	Employee	Regular	Enrolling	GS-Packag		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

cancel

**Save**

16. To process the documents, select they type of signature (eSignature or wet signature) and click “Next.”

Signature Method

Would you like to eSignature or Wet-Sign?

eSign  Wet Signature

**Next**

Click Next  
By Hand

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17. Complete the group representative section and click “Next.”

Group/Agent Contact

Please enter the email addresses of the group's representative and agent the required documents / agreements.

Group Representative Name & Position

Group Rep Email

Agent Name

Agent Email

Next

Previous

18. Click “Sign All Documents.” Click “Next.”

Document eSignature

E - Sign Group Enrollment Documents  
Following Documents will be sent for DocuSign

- Coverage Agreement

Sign All Documents

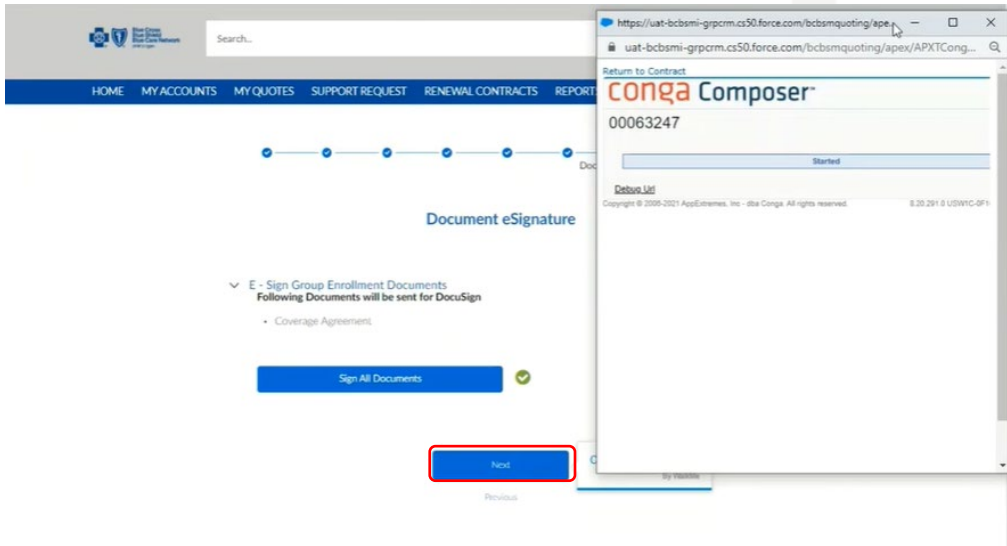
Click Sign All Documents  
This step may take a moment.

Next

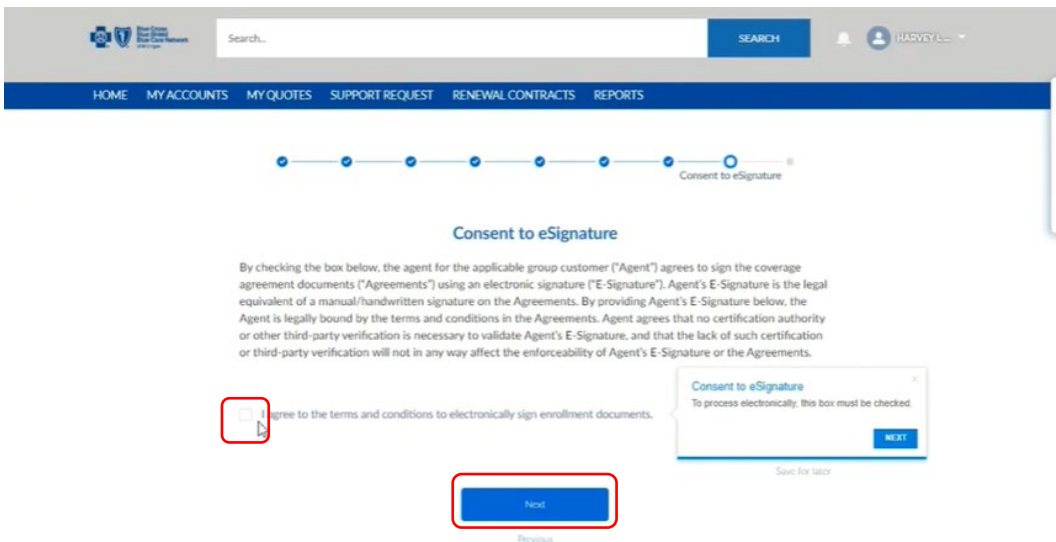
Previous



19. Cogna Composer will load the eSignature documents. Once the documents have been uploaded the Cogna Composer box will disappear. Click “Next.”

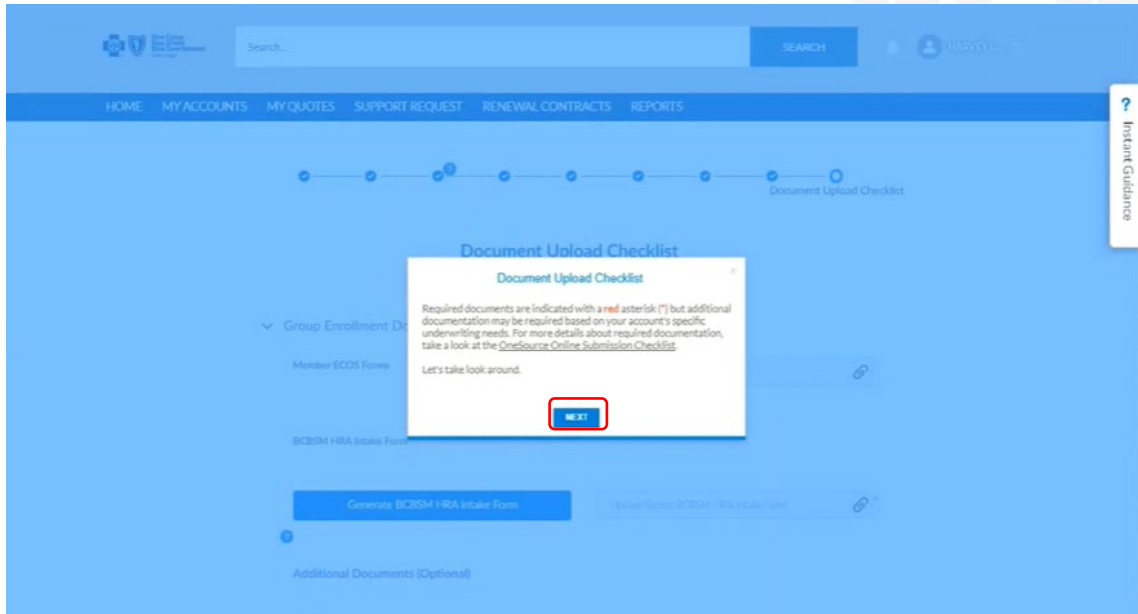


20. The Consent to eSignature page will open. Check the box to agree to the terms and conditions and click “Next.”

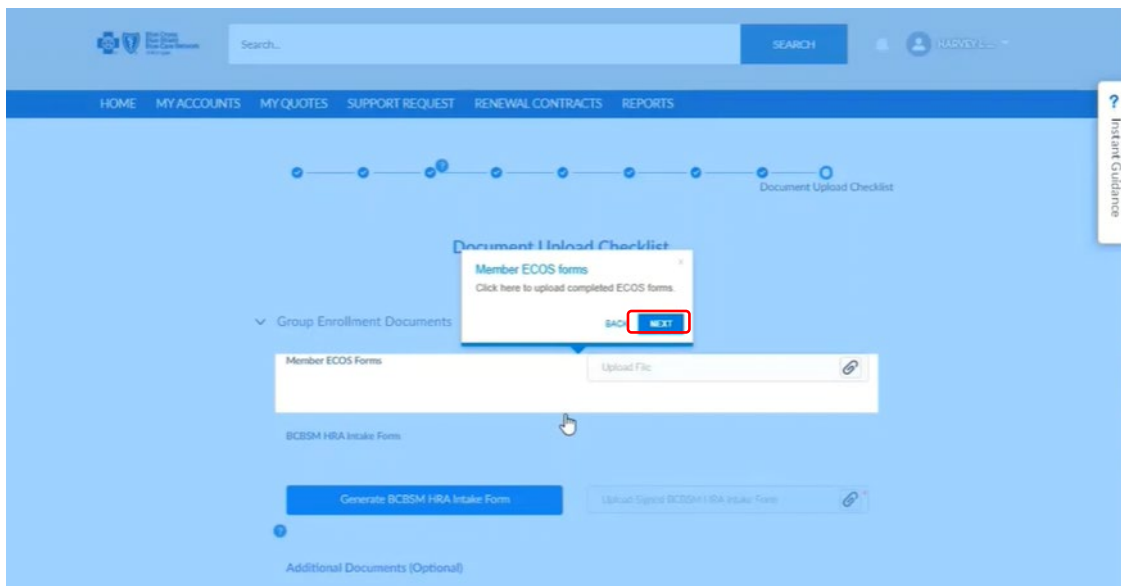




21. The Document Upload Checklist box will appear. Upload any required documents. Note: required documents are indicated with a red asterisk. Click “Next.”



22. If any new members need to be added, click “Next” in the “Member ECOS forms” box.





23. A box “Additional Documents” will pop up. Load any additional documents at this time. Click “Next.”

24. Confirm and submit, click “Next.”



23. A box “Additional Documents” will pop up. Load any additional documents at this time. Click “Next.”

BCBSM HRA Intake Form

Generate BCBSM HRA Intake Form

Additional Documents

Any additional supporting documentation should be attached here. Be sure to provide a concise Document Description then upload the file.

BACK NEXT

Add

Document Description

Upload File

Please confirm and click Submit, if all the necessary documents are uploaded.

Instant Guidance

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24. Confirm and submit, click “Next.” Note: At this point you can save for later or click “Next” to proceed.

BCBSM HRA Intake Form

Generate BCBSM HRA Intake Form

Upload Signed BCBSM HRA Intake Form

Additional Documents (Optional)

Confirm and Submit

Once all documentation has been signed and uploaded, click the checkbox to confirm.

BACK NEXT

Please confirm and click Submit, if all the necessary documents are uploaded.

Instant Guidance



25. Click on the paperclip to upload files. Double click on the appropriate files to upload.

26. Check the box to confirm and click “Submit.” The group wide change is complete.