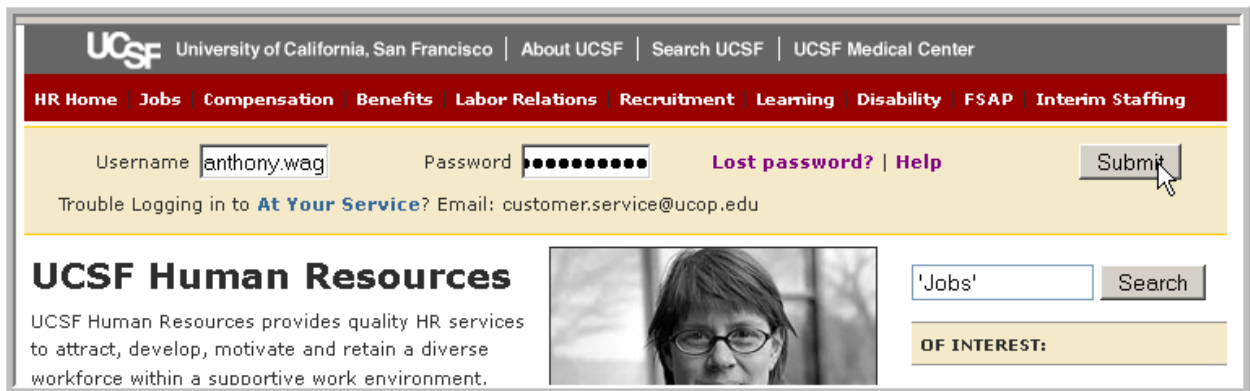


How does this enrollment process work?

1. Trainee completes Insurance Action Form (IAF), beneficiary form, and if applicable the Domestic Partner Affidavit.
2. Department coordinator reviews forms for completeness/accuracy (Members selecting Health Net must have a CA address on record).
3. Department coordinator will enter enrollment into GME Benefits Database and file original forms.
4. HR Benefit coordinator will look over daily entries to ensure accuracy and approve transactions.
5. Once approved, transactions will stay in the cue for a weekly upload to the respective insurance carriers.

Logging in to the System

Logging in to the Enrollment System. Your username will be your email address and your initial password is the last 4 digits of your SSN. Login problems? Contact luke.hones@ucsf.edu.



Selecting "Residents and Fellows" from the "Systems Available to You" dropdown.



BATCH Enrollment Changes

During the month of June you have a batch enrollment tool available.

NOTE: THE BATCH ENROLLMENT FEATURES ARE ONLY FOR CURRENT ENROLLMENTS.

If you have a number of enrollees who are not changing plans, but are continuing or terminating, you can use the batch enrollment list. You can navigate through a long list by selecting the first letter of an enrollee’s name.

Residents and Fellows

User: LORENZO WOO excel

Request Form

Show only active records

Filter by last name

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | R | S | T | V | W | Y | Z |

Restore Original Values

ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input type="checkbox"/>
027856236 ABELSON, DANIEL J	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input type="checkbox"/>

Select a row from the list (you can click your mouse anywhere on the row). The row’s checkbox will be selected and remain selected while you select other rows (TIP: select a row, hold down the [SHIFT] key and select another row to multiselect rows that are next to each other).

Filter by last name

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | R | S | T | V | W | Y | Z |

Restore Original Values

ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input checked="" type="checkbox"/>
027856236 ABELSON, DANIEL J	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input type="checkbox"/>

Residents and Fellows Enrollment System: Open Enrollment

Select an Action from the dropdown

All A B C D E F G H I J K L M N O P R S T V W Y Z							
ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input checked="" type="checkbox"/>
027856236 ABELSON, DANIEL J	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input type="checkbox"/>
026026005							<input type="checkbox"/>

Terminate Insurance will terminate at the end of June (TIP: You can enter a different term date in the rows "End" text box before submitting).

A row after Terminate Insurance action. "End" date is no longer editable. Active is marked with an "X". Update Status is "Completed". This will terminate enrollee and dependents on the End date.

ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	X	H	07/01/2010	06/30/2011	WOO,L	COMPLETED	<input type="checkbox"/>

A row after Continue Insurance action. "End" date is now 1 year in the future. Update Status is "Completed".

ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	A	H	07/01/2010	06/30/2012	WOO,L	COMPLETED	<input type="checkbox"/>

The same row after Restore Original Values action. Row is returned to original state.

ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input type="checkbox"/>

Residents and Fellows Enrollment System: Open Enrollment

Request Form Changes

The Request Form is available throughout the year, and is used to change enrollment information one enrollee at a time.

NOTE: THE REQUEST FORM CAN BE USED FOR CURRENT AND ENROLLEES.

During open enrollment, you can find the link at the top of your batch list.

Residents and Fellows

User: LORENZO WOO excel

Request Form

Show only active records

Filter by last name

[All](#) | [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [R](#) | [S](#) | [T](#) | [V](#) | [W](#) | [Y](#) | [Z](#)

Restore Original Values

ID / NAME	Active	Health Plan	Start	End	Coordinator	Update Status	<input type="checkbox"/>
023388465 ABDOLLANI-FARD, ALIREZA	A	H	07/01/2010	<input type="text" value="06/30/2011"/>	WOO,L	-	<input type="checkbox"/>

There are three main menus on the form: Enrollment (new enrollments and opt out), Change enrollment (Add Dependents, Cancel Dependents and, during open enrollment, Change Plans), and Terminate.

Request Form

User: LORENZO WOO

[Current Enrollee List](#) [Request List](#)

Enrollee

<p>Enrollment</p> <p><input type="radio"/></p> <p>Add new enrollee and dependants or opt out of enrollment</p>	<p>Change Enrollment</p> <p><input type="radio"/></p> <p>Add or subtract dependant to existing enrollee or change plan</p>	<p>Terminate</p> <p><input checked="" type="radio"/></p> <p>Terminate Enrollment (End Date not captured in E*Value)</p>
--	--	---

Residents and Fellows Enrollment System: Open Enrollment

When you select the type of form you want to complete, you will see an Enrollee box with a yellow text box. If you select the yellow textbox and start entering an enrollee's last name, a dropdown of residents will appear.

Enrollment <input checked="" type="radio"/> Add new enrollee and dependants or opt out of enrollment		Change Enrollment <input type="radio"/> Add or subtract dependant to existing enrollee or change plan	Terminate <input type="radio"/> Terminate Enrollment (End Date not captured in E*Value)
New Enrollment <input checked="" type="radio"/>		Opt Out <input type="radio"/>	
Enrollee	<input type="text" value="a"/>	<input type="text" value=""/>	
Current Program	<input type="text" value=""/>	<input type="text" value=""/>	
		ABEDALTHAGAFI, MALAK (021980081)	
		ABOIAN, MARIAM SOFIA (028171858)	
		ABREO, ADRIAN PAUL (025969338)	
		ACHARYA, BIBHAV (022747489)	

Select the enrollee's last name to begin the form process.

Residents and Fellows Enrollment System: Open Enrollment

Enrollee						
Enrollment <input checked="" type="radio"/>		Change Enrollment <input type="radio"/>		Terminate <input type="radio"/>		
Add new enrollee and dependants or opt out of enrollment		Add or subtract dependant to existing enrollee or change plan		Terminate Enrollment (End Date not captured in E*Value)		
New Enrollment <input checked="" type="radio"/>				Opt Out <input type="radio"/>		
Enrollee	021980081	ABEDALTHAGAFI,MALAK				
Current Program	PTSUR	PATH: SURGICAL INDEP				
<i>Gender</i>	<i>Age</i>	<i>Birth</i>	<i>Prog Year</i>	<i>Start</i>	<i>End</i>	
Female	30	07/19/1981	2010	07/01/2010	06/30/2011	
Enrollment						
<i>Insurer</i>	<i>Healthnet PCP "Enrollment" ID</i>		<i>Member Level</i>		<i>Member Rate</i>	
Select						
Add Dependents to Enrollment						
First Name	Last Name	PCP ID	Gender	Relationship	Date of Birth	Delete
			Select	Select		<input type="checkbox"/>
Add Dependent Row						
Enrollment Effective Date << June 2011 >> S M T W T F S				Termination Effective Date << June 2011 >> S M T W T F S		

If you select an Enrollee who you do not have system access to, a message will appear. Access is based on EValue program codes and the Benefits desk's assignment of coordinators to program codes. If you select the link "Give me access to change this enrollee" you will have short term access to change the enrollee's record.

Residents and Fellows Enrollment System: Open Enrollment

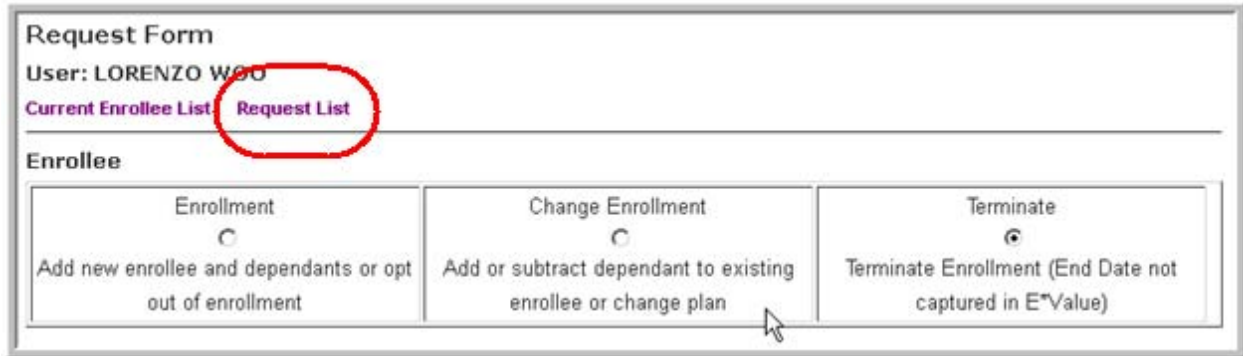
Enrollee	028171858	ABOIAN,MARIAM SOFIA
Current Program	RDRUC	RAD DIAG UC: ACGME
No Access to Enrollee Detail		
You do not have access to change or view this enrollment.		
The Program Code for ABOIAN,MARIAM SOFIA is: RDRUC - RAD DIAG UC: ACGME		
You are assigned access to these Program Codes: ANAN - ANESTHESIA ACGME ANPN - ANES: PAIN MGMT ANCRT - CRIT CARE: ANES ANPED - ANES: PEDIATRIC ANES		
Give me access to change this enrollee (24 hours access)		

After you have changed the enrollment record for the enrollee, you can enter further instructions in the Comment section. You must then select the "I agree to these terms" checkbox, and submit your request. If you want to test these features out before submitting, select the [Just Testing!] button.

Additional Comments	
Confirmation: I am authorized to request the changes on this form for the enrollee listed. I understand that I am subject to discipline, up to and including termination, if I request unauthorized changes to benefits for an enrollee in this system.	
<input type="checkbox"/> I agree to these terms.	
<input type="button" value="Submit Request"/>	<input type="button" value="Just Testing!"/>

Residents and Fellows Enrollment System: Open Enrollment

Once you've submitted, you can view your submission by selecting the "Request List" at the top of the form.

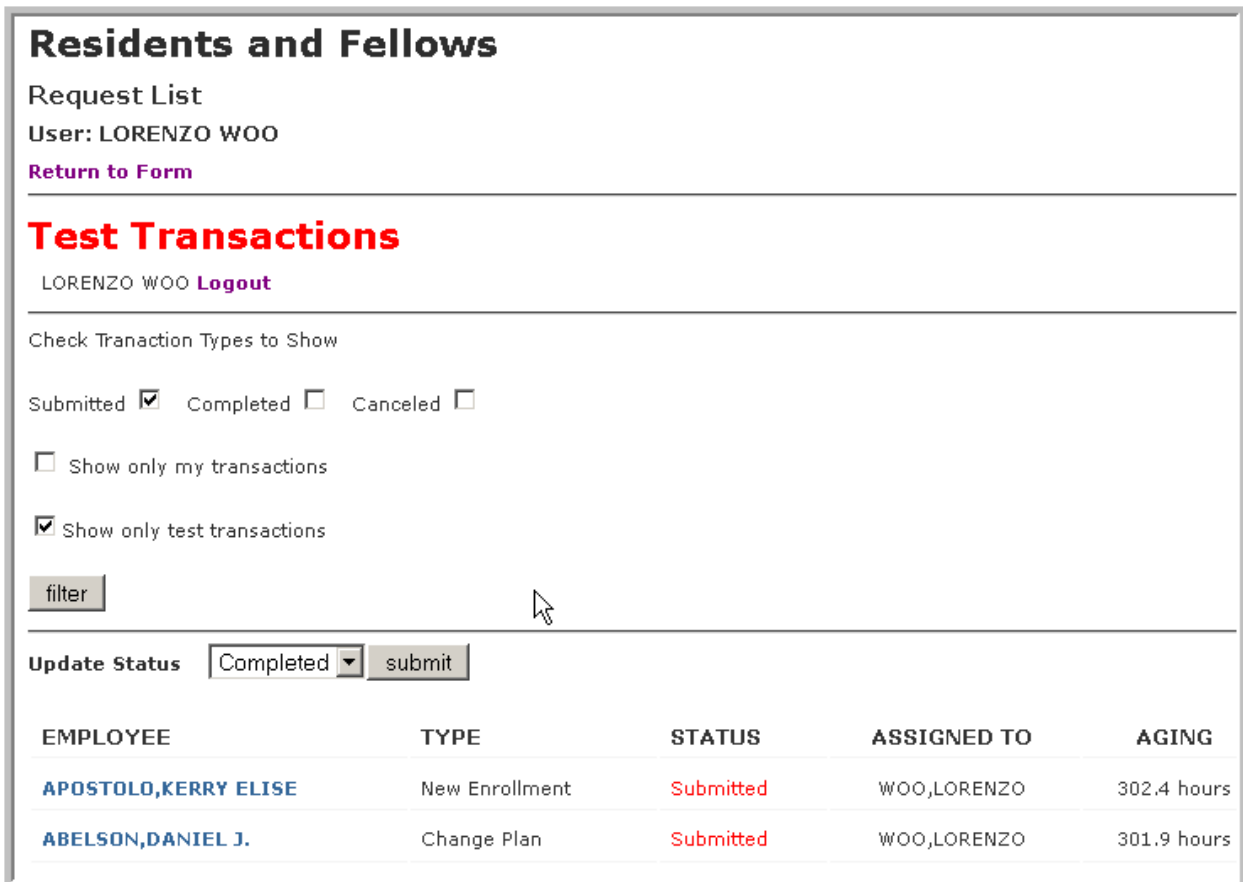


Request Form
User: LORENZO WOO
[Current Enrollee List](#) [Request List](#)

Enrollee

Enrollment ○ Add new enrollee and dependants or opt out of enrollment	Change Enrollment ○ Add or subtract dependant to existing enrollee or change plan	Terminate ○ Terminate Enrollment (End Date not captured in E*Value)
--	--	--

The Request List will display all of your requests (filter checkboxes also allow you to view test requests).



Residents and Fellows
Request List
User: LORENZO WOO
[Return to Form](#)

Test Transactions
LORENZO WOO [Logout](#)

Check Transaction Types to Show

Submitted Completed Canceled

Show only my transactions

Show only test transactions

Update Status

EMPLOYEE	TYPE	STATUS	ASSIGNED TO	AGING
APOSTOLO,KERRY ELISE	New Enrollment	Submitted	WOO,LORENZO	302.4 hours
ABELSON,DANIEL J.	Change Plan	Submitted	WOO,LORENZO	301.9 hours

By selecting a name link from this list you can look at the details of a specific request.

Residents Benefits Case Detail

[Request Form](#) [Request Cases](#)

LORENZO WOO [Logout](#)

Transaction Detail				
Transaction ID	022521819-11150974test			
Transaction Type	Term Dependent			
Sent To	Tony Wagner (415) 476-8093			
Status	Submitted			
Last Action Date	5/19/2011 07:31 PM			
Last Action By	Lorenzo Woo (415) 476-3235			
Original Submitter	Lorenzo Woo (415) 476-3235			
Employee Name	CARRA,SCOTT A (025689571)			
Term Dependent	Dep Name	Gender	Relationship	Birth
	WILL, CLAIRE	F	W	10/10/1972
End Date	6/30/2011 (no end date entered, assumed end of this month)			
Transaction Comments/Activity	LORENZO WOO (022521819) submitted on 2011-05-19 19:31:18			