Guide to Small Group Enrollment

meritus

Together for better health

Guide to Small Group Enrollment

Employer Application
Fill out the group application and submit.

Meritus Approval
Review and approval of group application.

Employee Open Enrollment
Employees select plans and enroll.

Employer Review & Submit
Approve and submit employee enrollments.

Enrollment Complete
System sends employee enrollment information to membership.

Welcome to Meritus
Group is active.

Employer Proposal Review

Completing the Proposal will trigger the enrollment application process.
Click **Apply** to move into the Group Application.

Employer Enrollment Application

After a Group Proposal has been created and plan options have been chosen (up to three), you can start a **Group Application** by selecting the **Apply** button in the proposal. Click **Next** to move through the pages of the application.

Step 1 – Group Information

Reminder: Group Applications must be completed and submitted by the 23rd of the month in order for the group to be effective on the 1st of the following month.

Step 2 - Enrollment

The date coverage begins, enrollment start date, length of the enrollment period, and eligibility information will be required.

Step 3 – Primary Contact

Enter the primary company contact. You can add additional company contacts as needed by selecting the **Add Contact** button.

Step 4 – Primary Address

Enter company address information. If you need to add other addresses for the company, click on the **Add Address** button.

Step 5 – Employees

Confirm employees and contribution amounts. If the employee information is complete, there will be a green **Complete** box next to each employee.

Additional information is need for any employee with a red box. Click on the red box and add the information requested.

Should all the employees have a red box, cancel the application and complete the Meritus Excel Census file and re-upload the information into the proposal.(See Tip Box below)

Tip: Save your work. Then go back into your **Applications** and change the status of your company to **Restore to Proposal**. This will allow you to re-upload the information into the proposal. By saving your work you can quickly move back to this step.

Step 6 – Documents

Upload the most recent company Quarterly Wage & Tax Report – Form UC018 and/or any other documentation needed to confirm employee status. Make sure all employees appear on the Wage & Tax and employee listing.

Step 7 – Benefits Summary

Choose **Submit** once you have reviewed the Applications Summary display, which shows all sections required to complete the application.

Check to make sure no more than three (3) plans are chosen.

Check to make sure no more than three (3) plans are chosen.

Meritus Approval

Meritus will review the group application to ensure eligibility criteria are met. Once the group is approved, the employer will receive an email to set up their employer account where they review and approve employee enrollments. A broker can also do this on behalf of the employer.
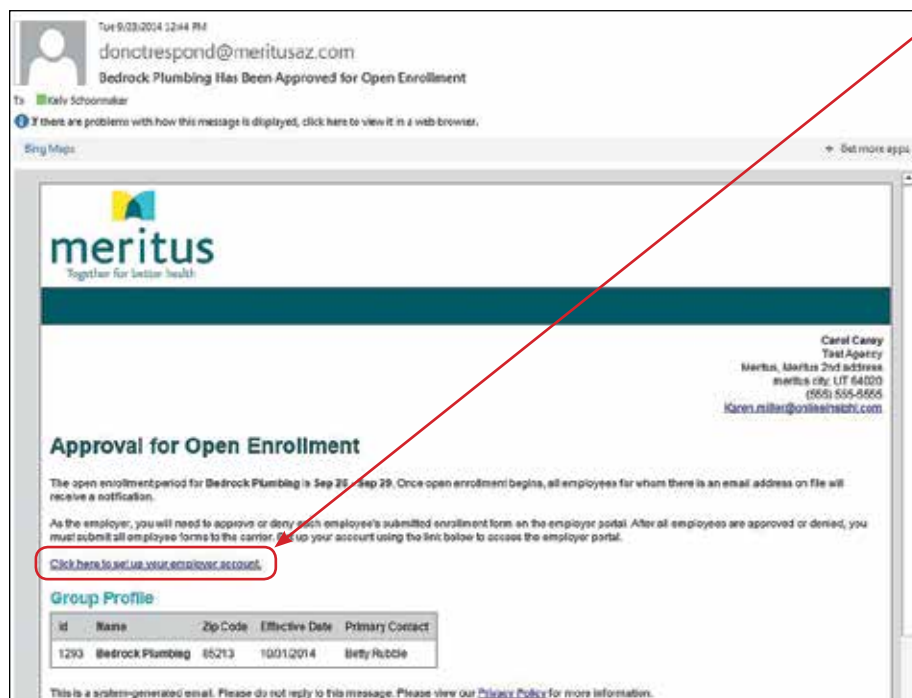
Click on the link to set up an **Employer Portal** account. The Employer Verification screen will launch for the Employer to verify their identity and move on to creating their portal.
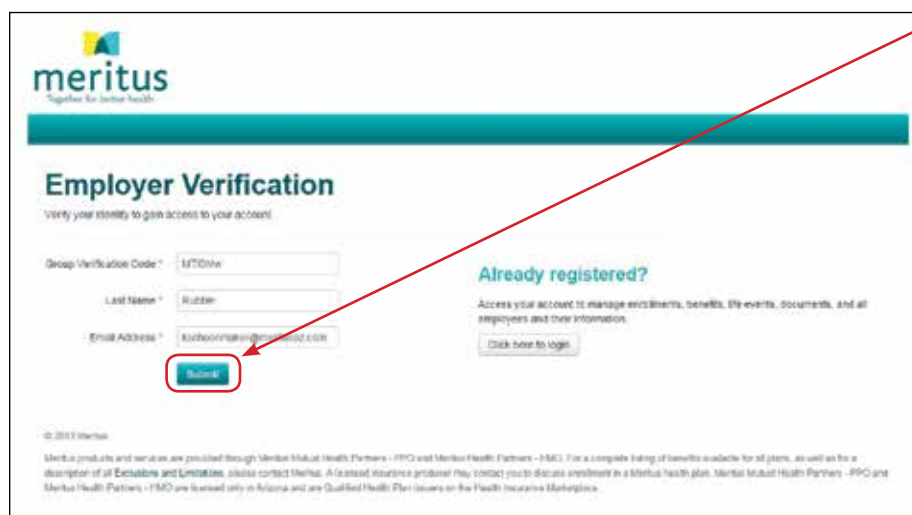
At the close of open enrollment, once the employer has approved all employees, the employer or broker will submit the enrollments to Meritus and submit initial payment.
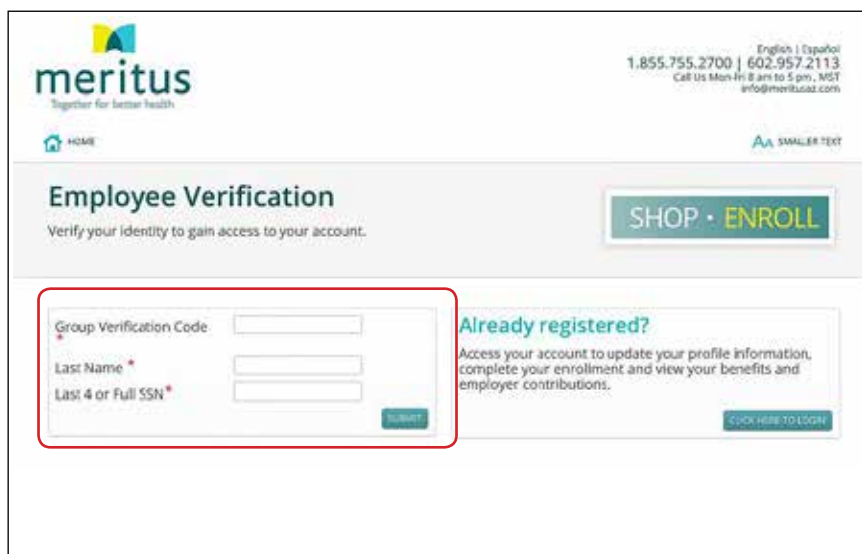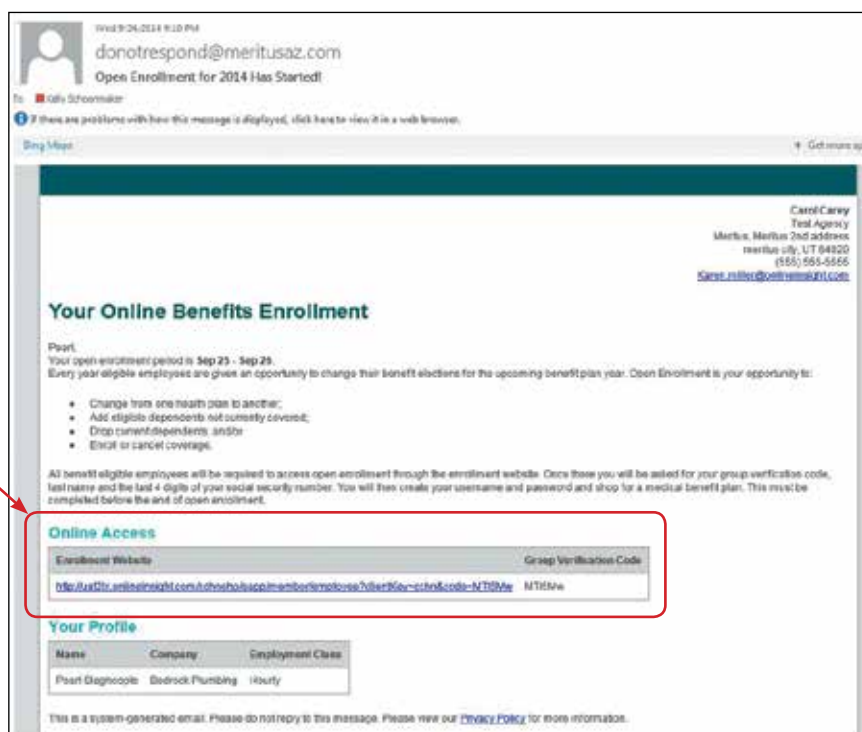
Employee Open Enrollment

Next Steps are for the Employees

Once your open enrollment period begins, you will receive an email notifying you that Open Enrollment has started. The email contains a link and an access code.

Click on the link in your email notification, the next screen asks employees to register. Once registered, the link can also be used to log back in.

2015MER0038

Once the employee fills in their last name and last four digits of their Social Security Number (SSN), they are taken to a registration screen.

Once registered, the employee is taken to their dashboard where they can make a plan selection and perform other tasks.

Dashboard

From the **Quick Links** box the employee can perform the following tasks:

1) **Account Setting** – update their password and security questions

2) **View Personal Data** – update name, address and phone number

3) **Upload a Document**

4) **Uniform Glossary of Terms**

From the **No Benefits Selected** box, the employee can select:

1) **Browse Plans** to view the plans their employer is offering

2) **Help Me Choose a Plan**

3) **I'm declining coverage**

The first time selecting either of these, the employee is asked to verify their personal information.

A confirmation box will appear asking you to verify personal information. You should add or delete any dependents at this time.

When **Browse Plans** is selected, the employee will see a list of plans to select from.

Once the employee selects a plan, a confirmation screen appears and the employee can begin enrollment.

The first screen asks for personal information.

The second screen asks if the employee has any other coverage.

The third screen requests confirmation of the employee's selection. If amendments are required, the employee can click on the tabs to go back.

The final screen asks for the employee's electronic signature.

On completion, the employee receives a screen confirmation and a confirmation email.

The Employee Enrollment is now complete!

Employer Review & Submit

Once open enrollment has closed, the employer will need to go into their Employer Portal and ensure all employees have completed enrollment – whether they are enrolling or waiving coverage.

The employer will then need to **Approve** all of the employee enrollments. This can be done individually as employees complete the elections or all at one time.

When all the employees are approved, then the employer will click on the **Review Complete** button to submit the enrollment and move to the payment screen.

As the broker, you may also complete these tasks for your client.

It is best to pay the binder premium directly online at the time of enrollment. The employer can later choose to have billing statements mailed to them or emailed depending on how the employer would prefer to handle the future monthly premium payments.

Enrollment Complete

The employee enrollment data will be transferred electronically to Meritus and uploaded into our enrollment system.

Welcome to Meritus

The group is now active and coverage will begin on the selected effective date. ID cards and welcome packets will be sent to the employee addresses supplied with the enrollment information within 10 business days. The group policy number is displayed in the **Profile** box.

Welcome to Meritus!

ADDRESS
2005 West 14th Street
Suite 113
Tempe, Arizona 85281

WEBSITE
meritusaz.com

EMAIL
sales@meritusaz.com
groupquotes@meritusaz.com

PHONE
602-957-2113

TOLL FREE
855-755-2700

TTY
7.1.1

HOURS OF OPERATION
8 am to 5 pm (M-F)

meritus
Together for better health