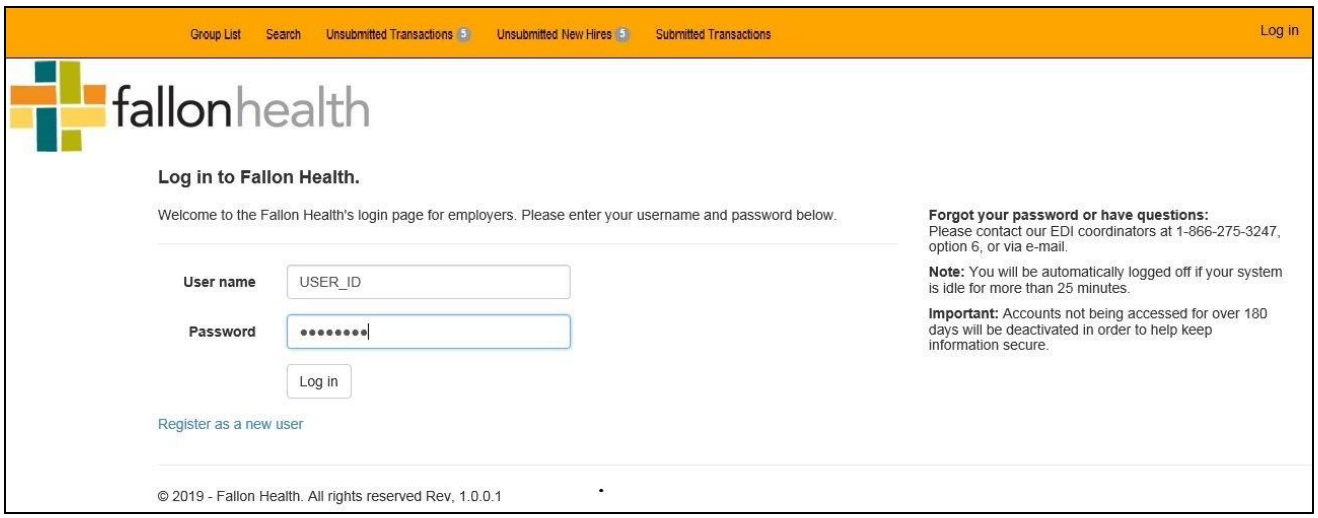
Your guide to secure online enrollment on fallonhealth.org

Section 1

Getting Started

Log in to secure online enrollment at fallonhealth.org. Enter your User name and password then click on the Log in button.



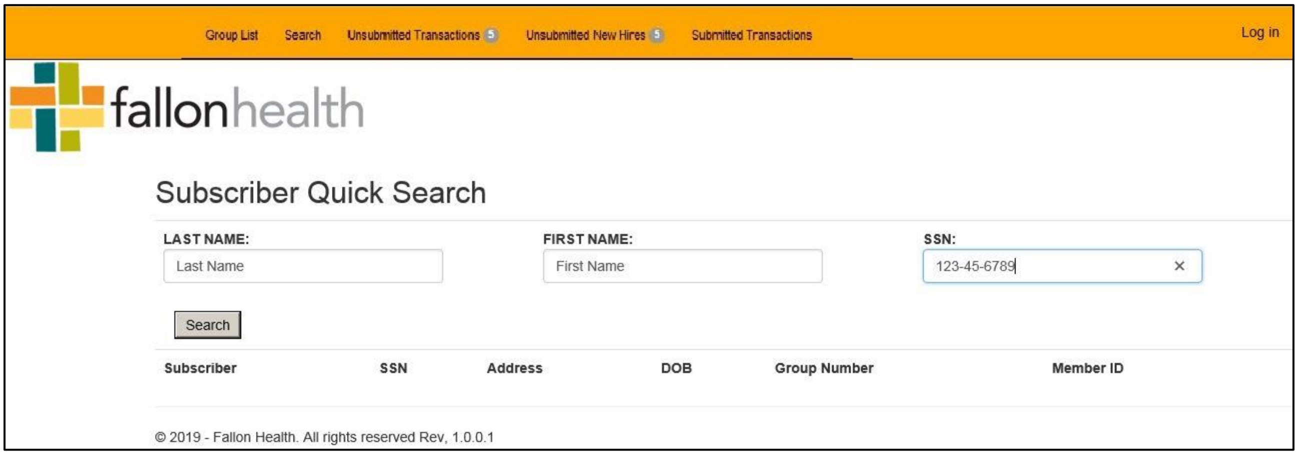
General note for the application:

Blue buttons➔save for later
Red buttons➔discard changes
Green buttons➔submit changes to Fallon Health for processing

Section 2

Making Inquiries – Finding an existing Subscriber

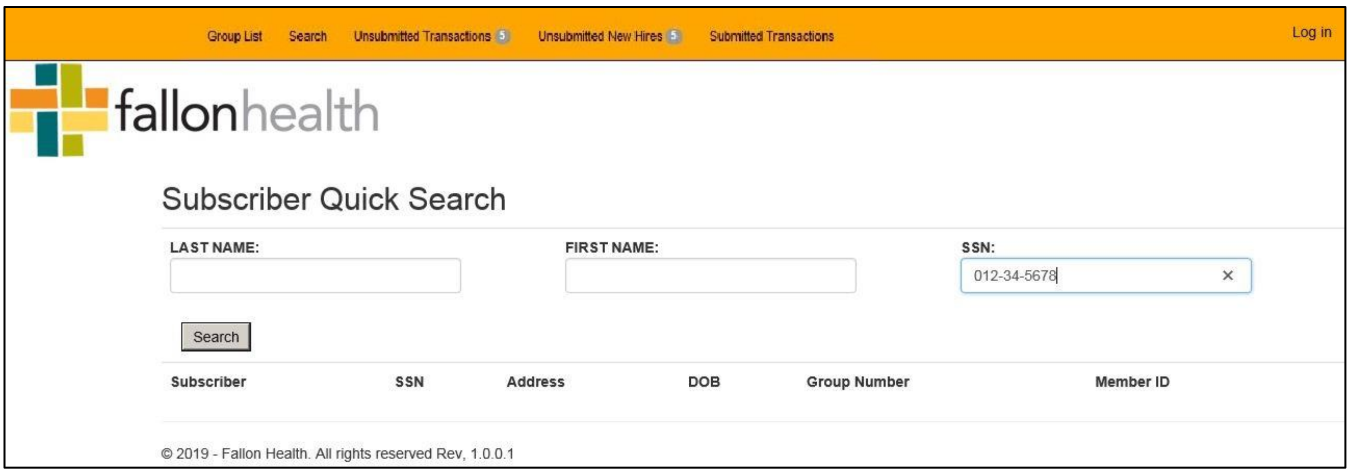
Subscriber Quick Search - When logged in, click on **Subscriber Quick Search** at the top of the screen or the **Search** option within the top orange bar and the searching options will appear.



- **Last Name search –** This search allows you to enter as much of the last name as you have and click on the Search button. All subscribers matching the characters entered in the last name field will appear.
    - From the search results, user can click on the name of a subscriber to navigate to that record.

- **First Name search** - This search allows you to enter as much of the first name as you have and click on the Search button. All subscribers matching the characters entered in the first name field will appear.
    - From the search results, user can click on the name of a subscriber to navigate to that record.

- **SSN search** – This search allows you to enter a Subscriber's full SSN and click on the Search button. Subscriber matching this SSN will appear and only the SSN's last 4 digits will be displayed.

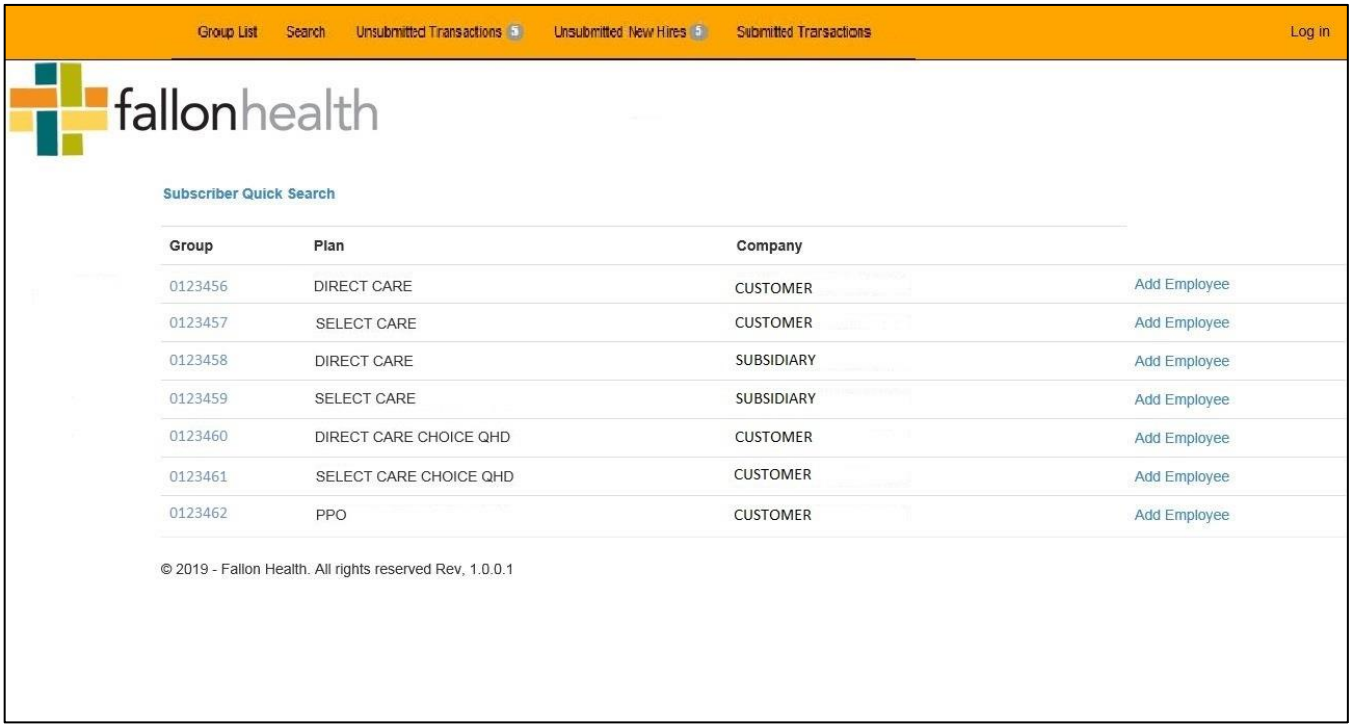


    - From the search results, user can click on the name of a subscriber to navigate to that record.

Section 3

Group and Employees View

Group View - All Group's numbers associated with your secure login will be presented along with the corresponding Plan and Company.



Group	Plan	Company	
0123456	DIRECT CARE	CUSTOMER	Add Employee
0123457	SELECT CARE	CUSTOMER	Add Employee
0123458	DIRECT CARE	SUBSIDIARY	Add Employee
0123459	SELECT CARE	SUBSIDIARY	Add Employee
0123460	DIRECT CARE CHOICE QHD	CUSTOMER	Add Employee
0123461	SELECT CARE CHOICE QHD	CUSTOMER	Add Employee
0123462	PPO	CUSTOMER	Add Employee

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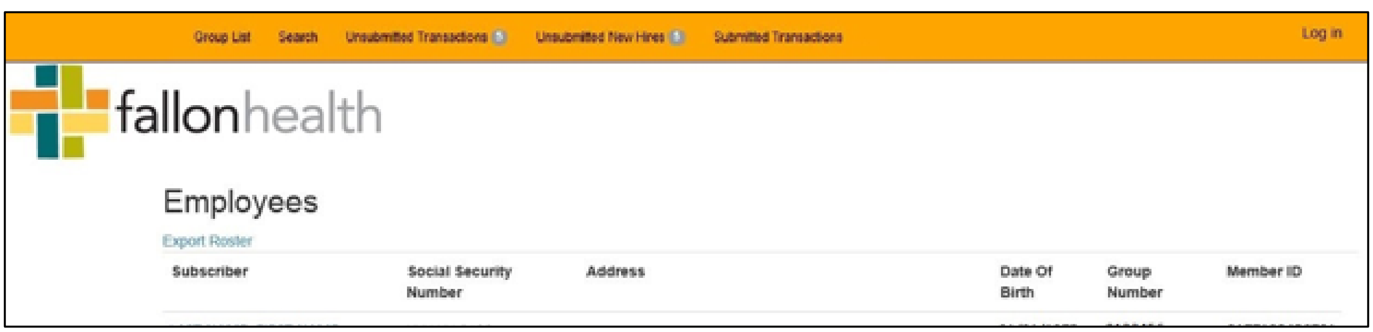
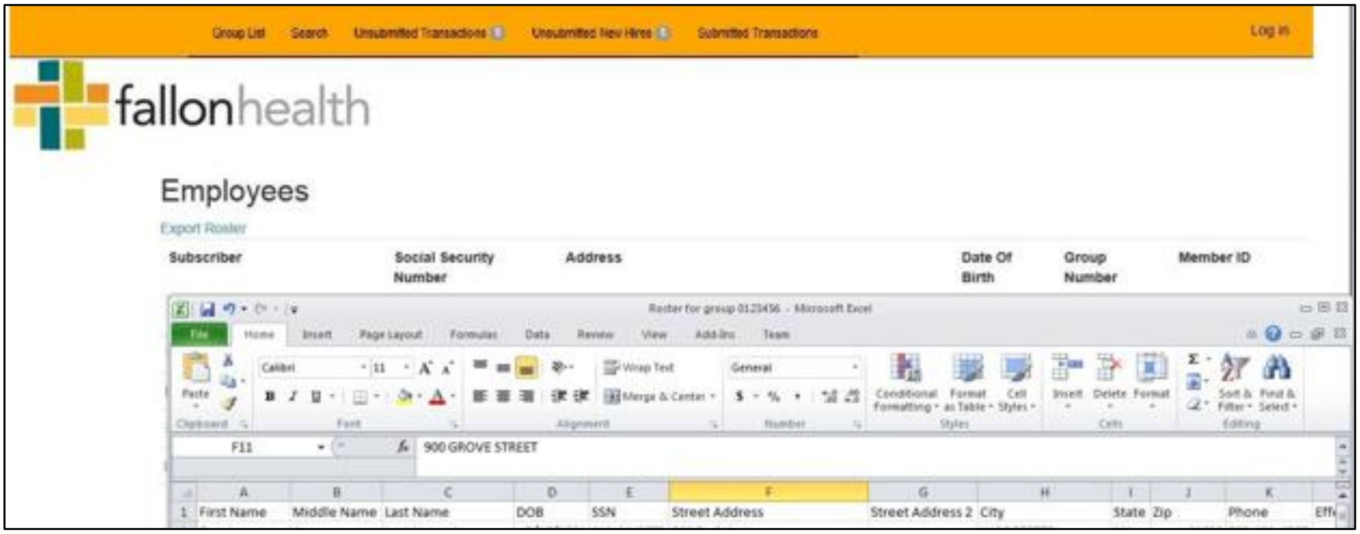
View Employees in the Group – Click on the Group number link to view all Employees for the selected group. User has an ability to add a new employee to the group



Exporting the Roster – User has the ability to select employee record by clicking on the name. Depending on the number of members in a group page numbers will be available at the bottom of the displayed list. Clicking on the Export Roster link, will export a group roster which will open in an Excel format (*.csv) as follows:

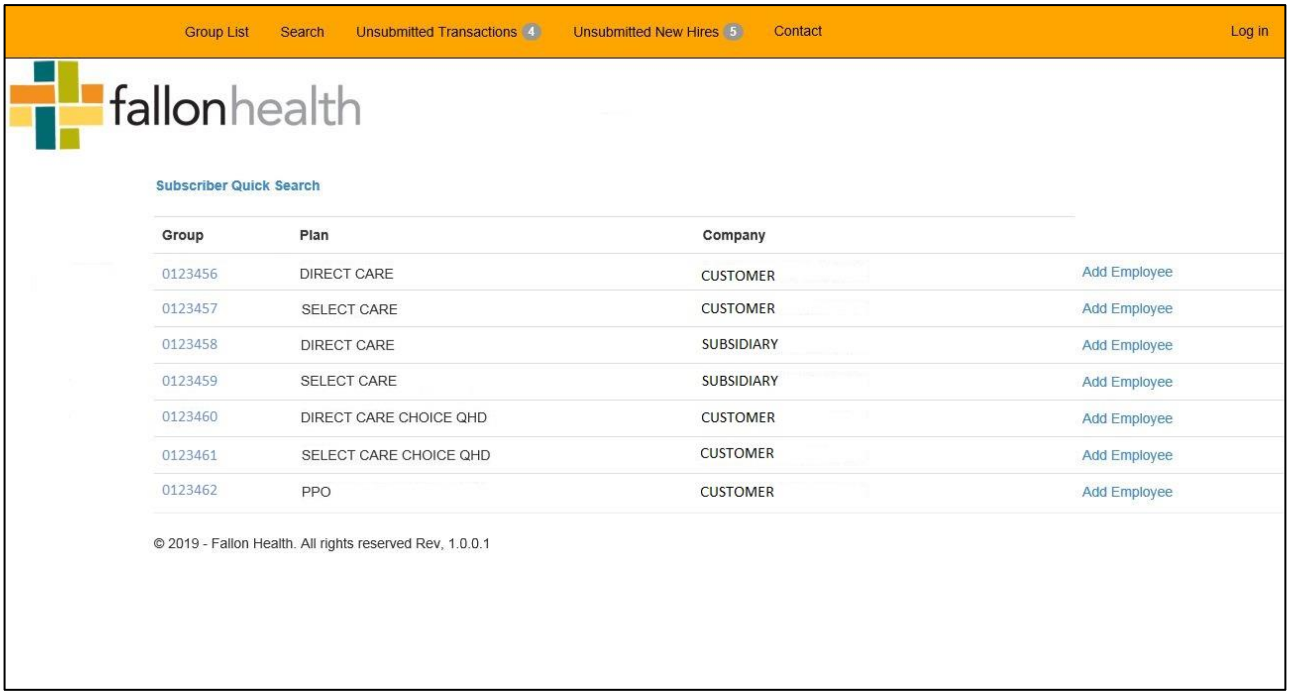


Once the file has opened in Excel (or other spreadsheet program) some columns may require formatting (Member ID will need to be formatted as a number, date fields should be formatted to date data type and zip fields can be formatted as custom data type 00000 to display all 5 digits.) In order to get this accomplished, select the column that needs formatting, right click and select Format Cells. Choose either a number, date or custom category for the corresponding field. These changes will make the file more readable.

Section 4

Adding Employees and Dependents

Add Employee – Add Employee link is located when user logs in and the Group List is presented. Clicking on the Group List tab at the top Orange bar, will also allow user to see the Group List and Add an Employee to that particular Group.



Group	Plan	Company	
0123456	DIRECT CARE	CUSTOMER	Add Employee
0123457	SELECT CARE	CUSTOMER	Add Employee
0123458	DIRECT CARE	SUBSIDIARY	Add Employee
0123459	SELECT CARE	SUBSIDIARY	Add Employee
0123460	DIRECT CARE CHOICE QHD	CUSTOMER	Add Employee
0123461	SELECT CARE CHOICE QHD	CUSTOMER	Add Employee
0123462	PPO	CUSTOMER	Add Employee

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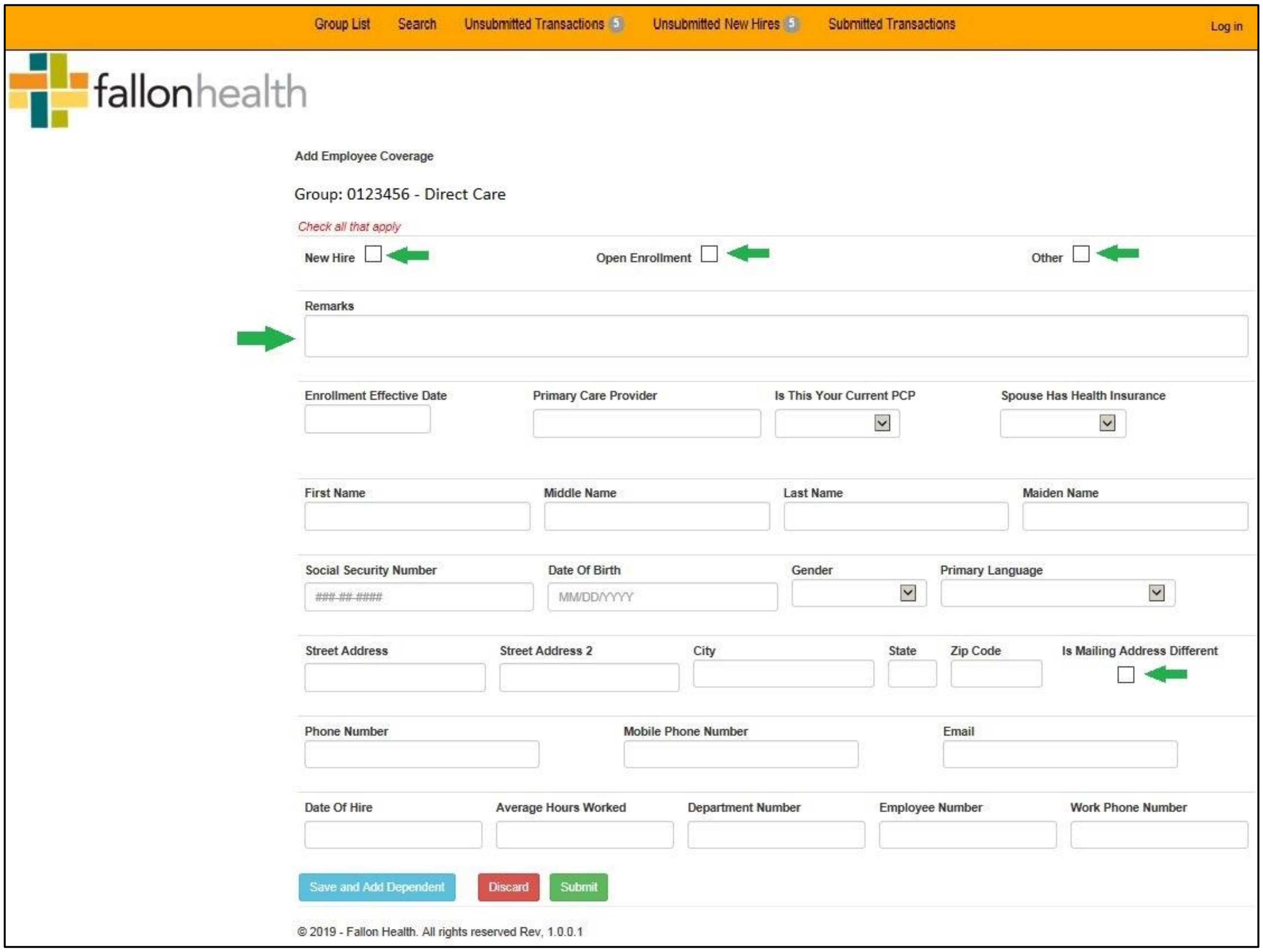
User is able to click on the **Add Employee** link to perform the following functions:

- Add a New Hire
- Add an employee during Open Enrollment
- Add employee's mailing address
- Add employee for any Other reason that can be specified in the remarks section



If the user selects "Is Mailing Address Different?" checkbox, mailing address fields will appear below street address.

If new hire has NO dependents:

Save and Add Dependent➔ Saves for additional updates

Discard➔discards all changes

Submit➔ forwards new hire transaction to Fallon Health for processing

The changes for SUBSCRIBER NAME have been submitted.

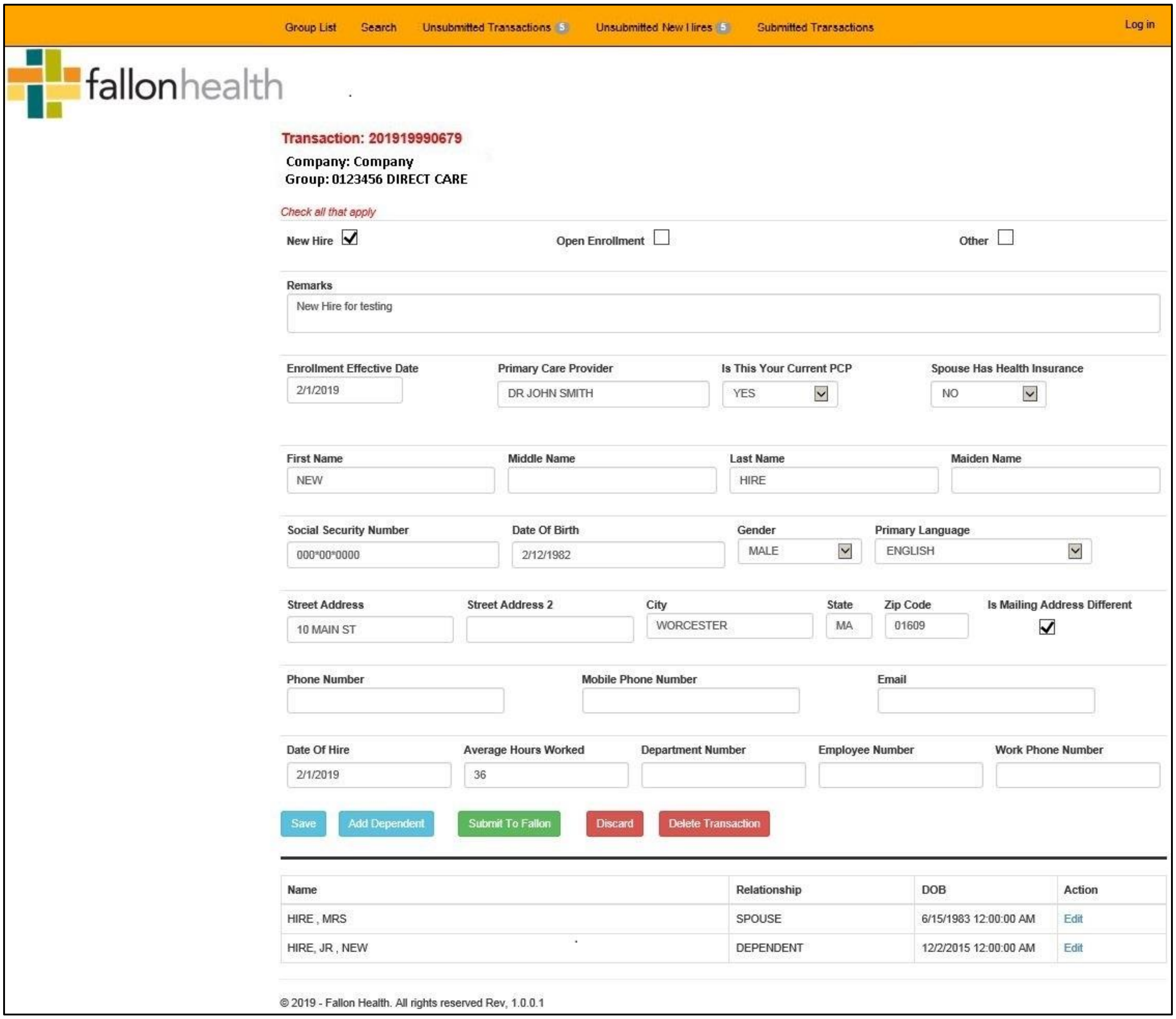
Transaction Number: xxxxxxxxxxxxx

Transaction Effective Date: mm/dd/yyyy

Changes will be available in the roster within 72 business hours.

If new hire has dependents:

Save and Add Dependent➔ Saves the new hire and allows user to add dependents.



Group List Search Unsubmitted Transactions 5 Unsubmitted New Hires 5 Submitted Transactions Log in

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Transaction: 201919990679

Company: Company
Group: 0123456 DIRECT CARE

Check all that apply

New Hire ☑ Open Enrollment ☐ Other ☐

Remarks
New Hire for testing

Enrollment Effective Date	Primary Care Provider	Is This Your Current PCP	Spouse Has Health Insurance
2/1/2019	DR JOHN SMITH	YES	NO

First Name	Middle Name	Last Name	Maiden Name
NEW		HIRE	

Social Security Number	Date Of Birth	Gender	Primary Language
000*00*0000	2/12/1982	MALE	ENGLISH

Street Address	Street Address 2	City	State	Zip Code	Is Mailing Address Different
10 MAIN ST		WORCESTER	MA	01609	☑

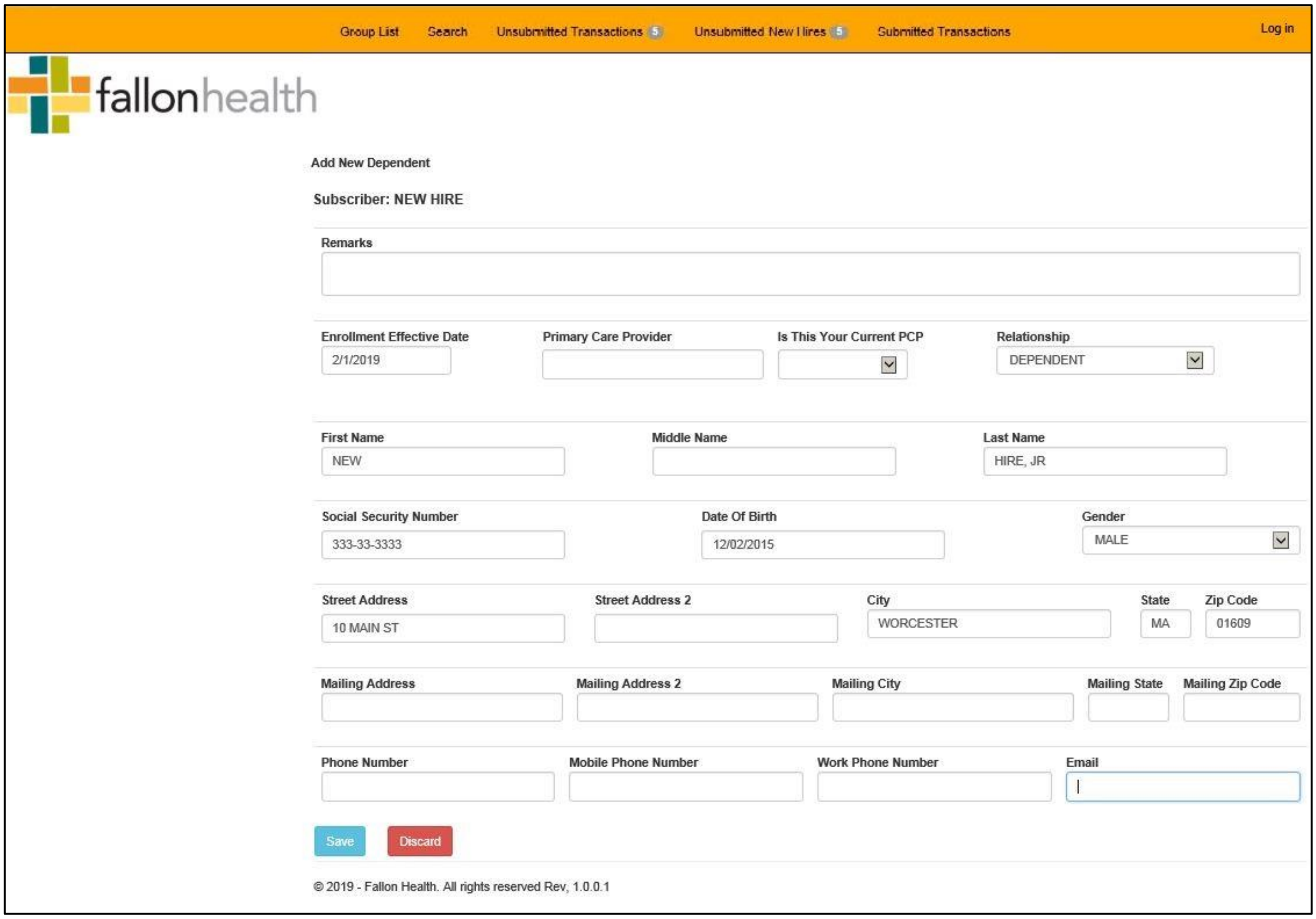
Phone Number	Mobile Phone Number	Email

Date Of Hire	Average Hours Worked	Department Number	Employee Number	Work Phone Number
2/1/2019	36			

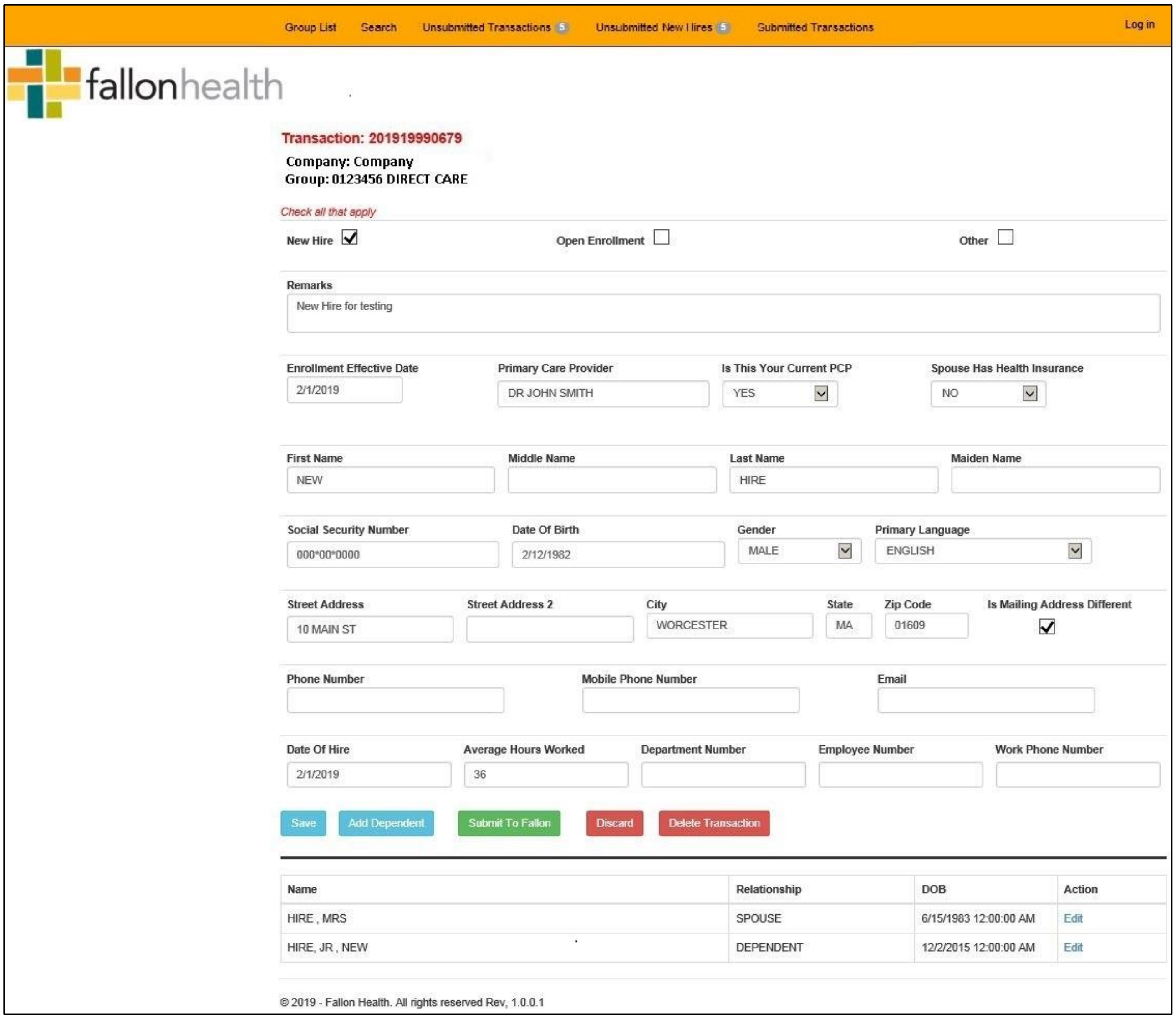
Save Add Dependent Submit To Fallon Discard Delete Transaction

Name	Relationship	DOB	Action
HIRE , MRS	SPOUSE	6/15/1983 12:00:00 AM	Edit
HIRE, JR , NEW	DEPENDENT	12/2/2015 12:00:00 AM	Edit

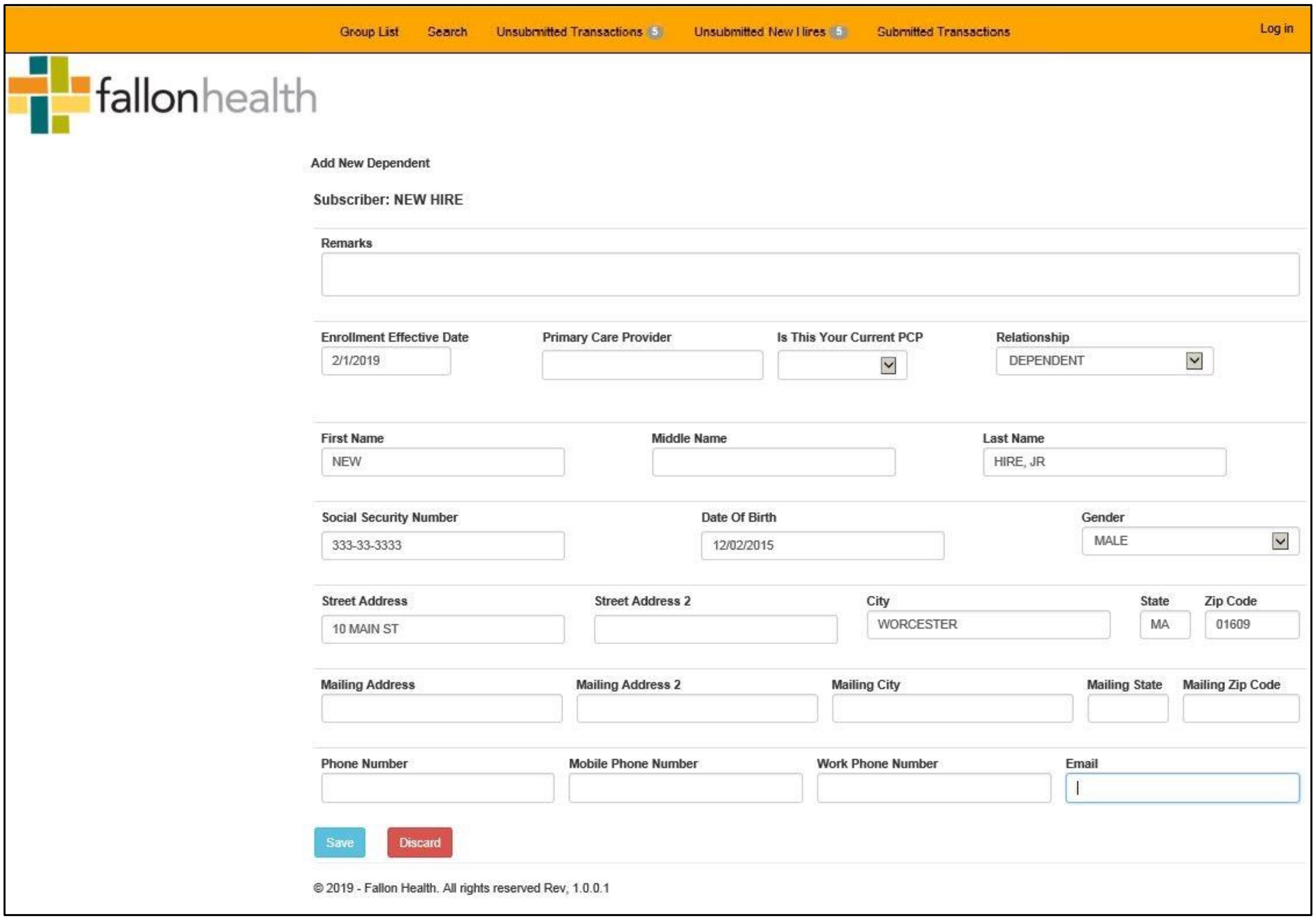
User clicks on Add Dependent and the following screen allows user to enter dependent's data:



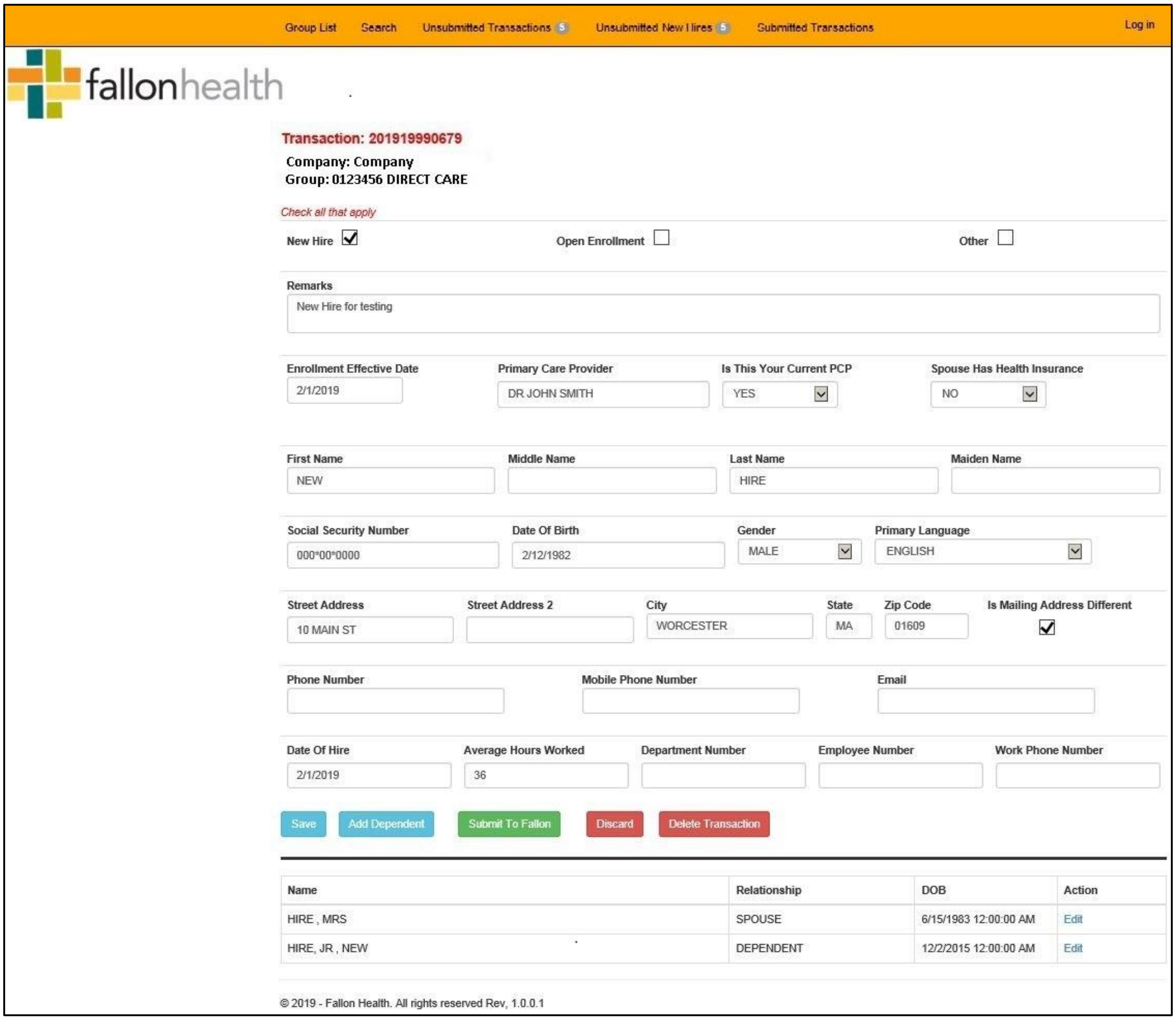
User clicks Save to return to New Hire page and see dependent added (bottom of page)



For each additional dependent, user clicks Add Dependent



User clicks Save when additional dependent information is complete



Once all dependents have been added, user clicks Submit to Fallon button, the following message will appear:

The changes for SUBSCRIBER NAME have been submitted.

Transaction Number: xxxxxxxxxxxxx

Transaction Effective Date: mm/dd/yyyy

Changes will be available in the roster within 72 business hours.

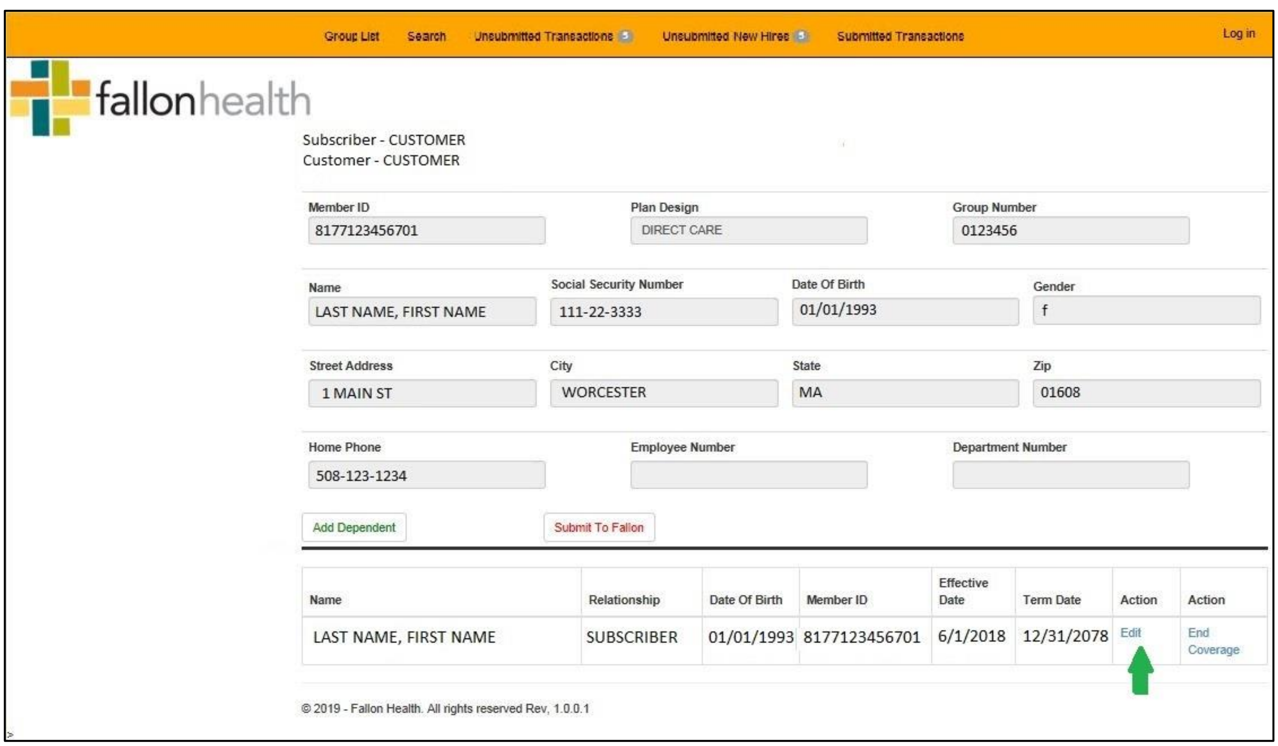
Section 5

Editing Employee and Dependent information

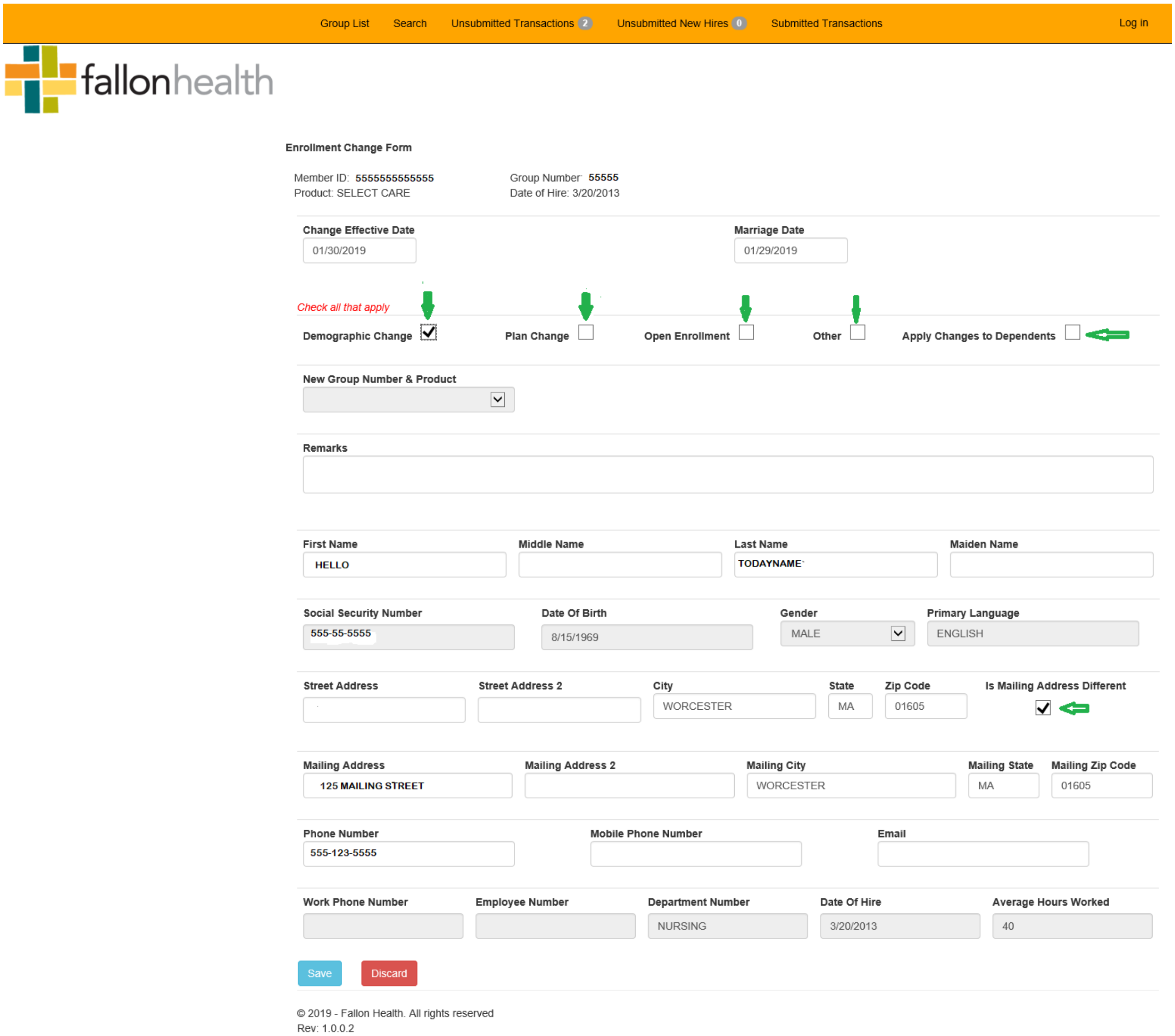
Editing Employee – An employee can have changes that can be Edited and are as follows:

- Demographic Change - Selecting a ‘Demographic Change’ checkbox will allow user to change, demographic related information, such as First Name, Middle Name, Last Name, Maiden Name, Address related fields, phone number and email. Change Effective Date and Marriage Date can also be changed.
- Plan Change – Selecting a ‘Plan Change’ checkbox will allow user to edit Plan information by selecting New Group Number and Product available in the dropdown.
- Open Enrollment – Selecting an ‘Open Enrollment’ checkbox allows user to enter a new Effective Date and or a Marriage Date.
- Other – Selecting an ‘Other’ checkbox, allows the user to edit Social Security Number, Date of Birth, Gender, Primary Language, Work Phone Number, Employee Number, Department Number, Date of Hire and Average Hours Worked.
- Apply Changes to Dependents – Selecting ‘Apply Changes to Dependents’ option will allow all the changes made to propagate to all the dependents that are associated with this member id.
- Is Mailing Address Different – a checkbox to allow user to enter the mailing address is located on the Street Address line and if selected, provides an ability to enter or edit the Mailing Address information.

Search and Select an employee that needs to be Edited. Click on the Edit link corresponding to that Employee.



Enrollment Change Form will open and display the member id, group number, product and date of hire for the member whose data is being Edited. Each option will open up the fields that can be edited.


Group List | Search | Unsubmitted Transactions 2 | Unsubmitted New Hires 0 | Submitted Transactions | Log in

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Enrollment Change Form

Member ID: **5555555555555** Group Number: **55555**
Product: SELECT CARE Date of Hire: 3/20/2013

Change Effective Date: 01/30/2019
Marriage Date: 01/29/2019

Check all that apply

Demographic Change ☑ Plan Change ☐ Open Enrollment ☐ Other ☐ Apply Changes to Dependents ☐

New Group Number & Product

Remarks

First Name	Middle Name	Last Name	Maiden Name
HELLO		TODAYNAME	

Social Security Number	Date Of Birth	Gender	Primary Language
555-55-5555	8/15/1969	MALE	ENGLISH

Street Address	Street Address 2	City	State	Zip Code	Is Mailing Address Different
		WORCESTER	MA	01605	☑

Mailing Address	Mailing Address 2	Mailing City	Mailing State	Mailing Zip Code
125 MAILING STREET		WORCESTER	MA	01605

Phone Number	Mobile Phone Number	Email
555-123-5555		

Work Phone Number	Employee Number	Department Number	Date Of Hire	Average Hours Worked
		NURSING	3/20/2013	40

Save Discard

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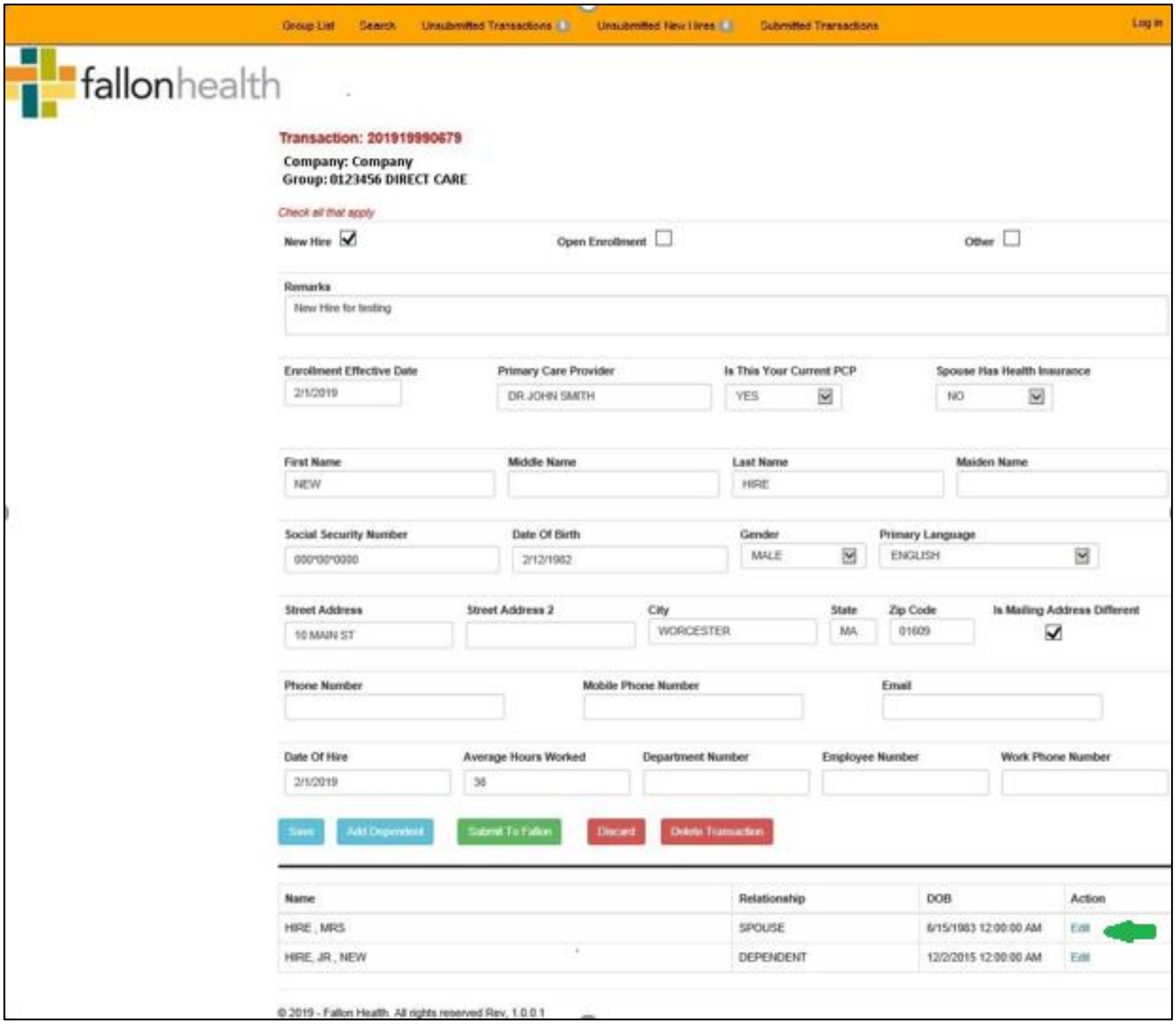
Clicking on the Save button, will apply all the edits made to this Member's record.

Editing Dependent Information – Search and Select an Employee whose dependent information needs to be Edited. Click on the Edit link corresponding to that dependent, see the link below.



After user clicks on the Edit link, the Enrollment Change presents once again and allows edits to be made and Saved.

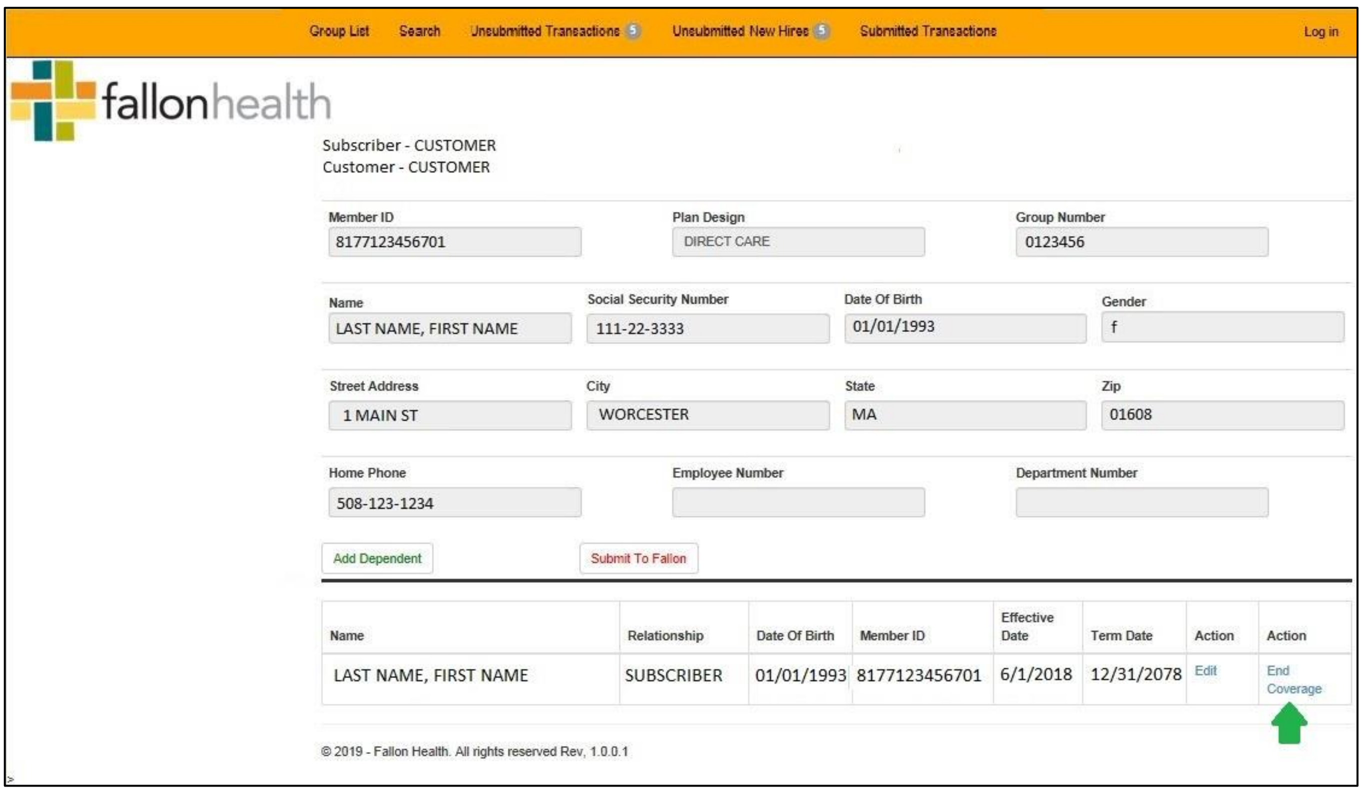
Section 6

Ending Coverage

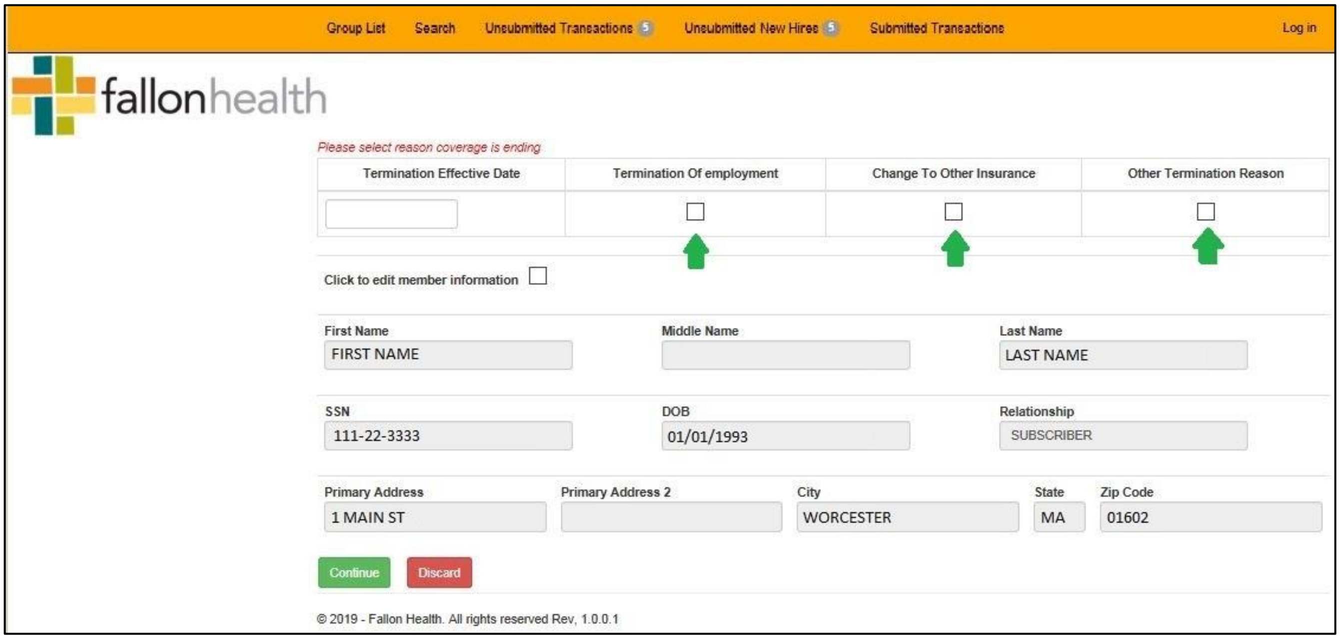
End Coverage – An employee's coverage can end for the following reasons:

- Termination Of Employment
- Change to Other Insurance
- Other Termination Reason

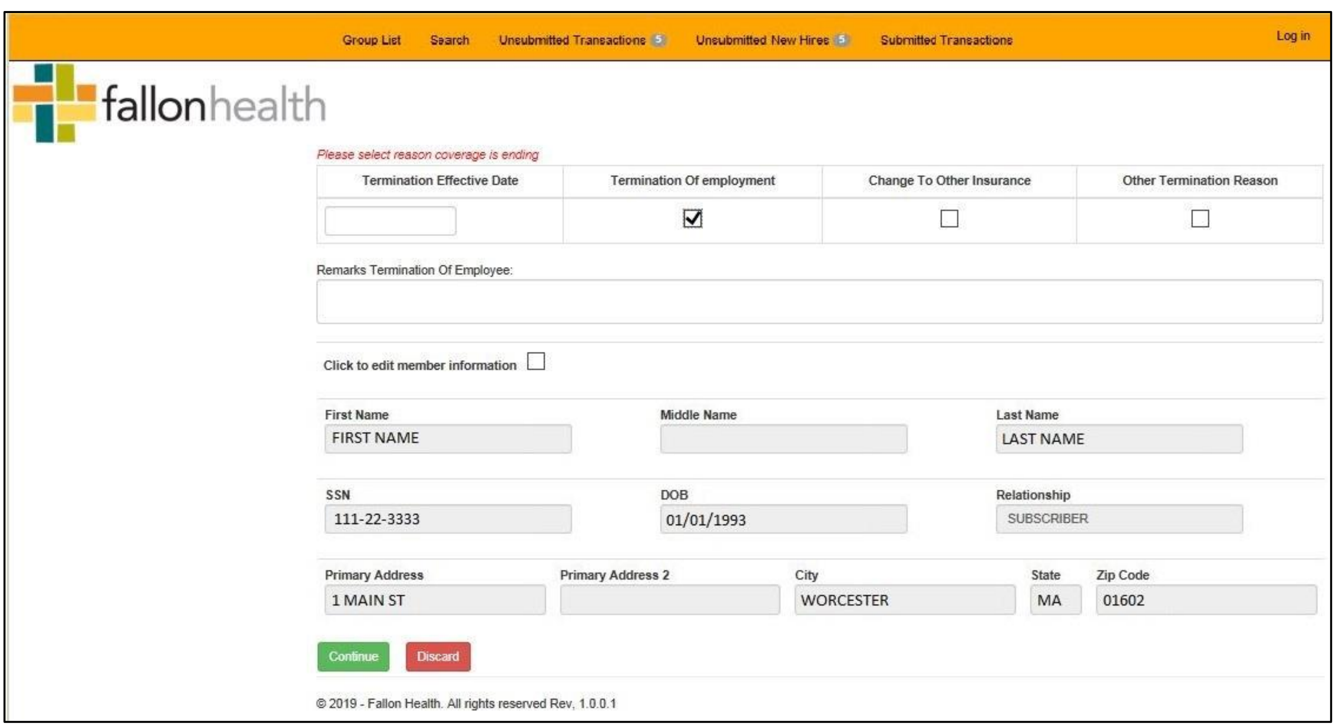
In order to end coverage for an employee, navigate to the corresponding employee and click on the End Coverage button



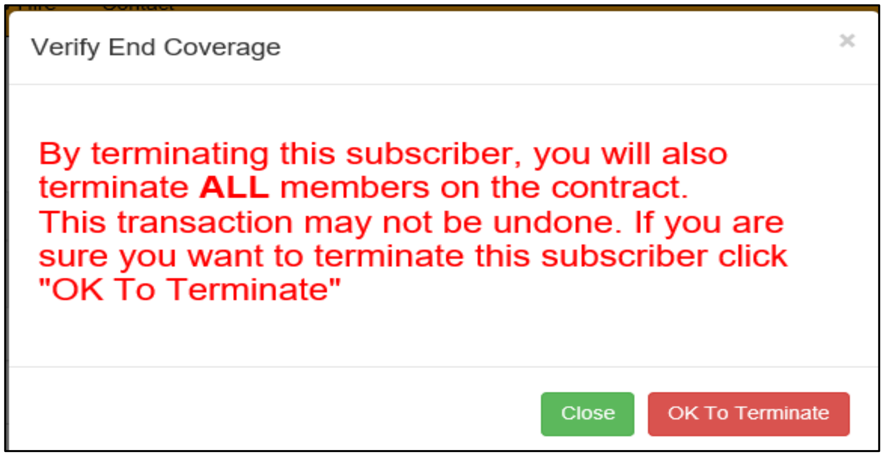
User is then presented with the following screen, where the selection of the type Termination can be made:



- ***Termination of Employment*** *selection* – User is asked to select a reason coverage is ending. If the 'Termination of employment' checkbox is selected, user is presented with the 'Remarks Termination of Employee' text box to fill in the corresponding reason for this selection.

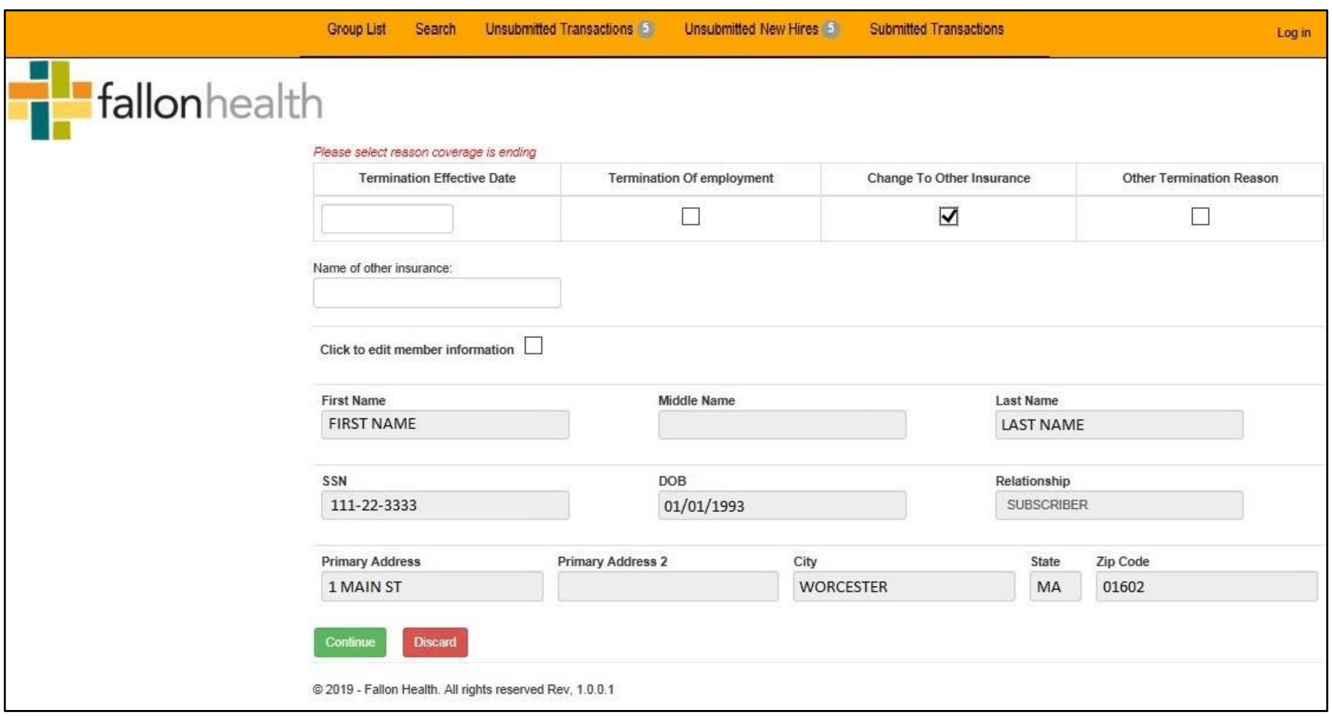


After the user fills in relevant information and clicks on Continue, the following message will be received:



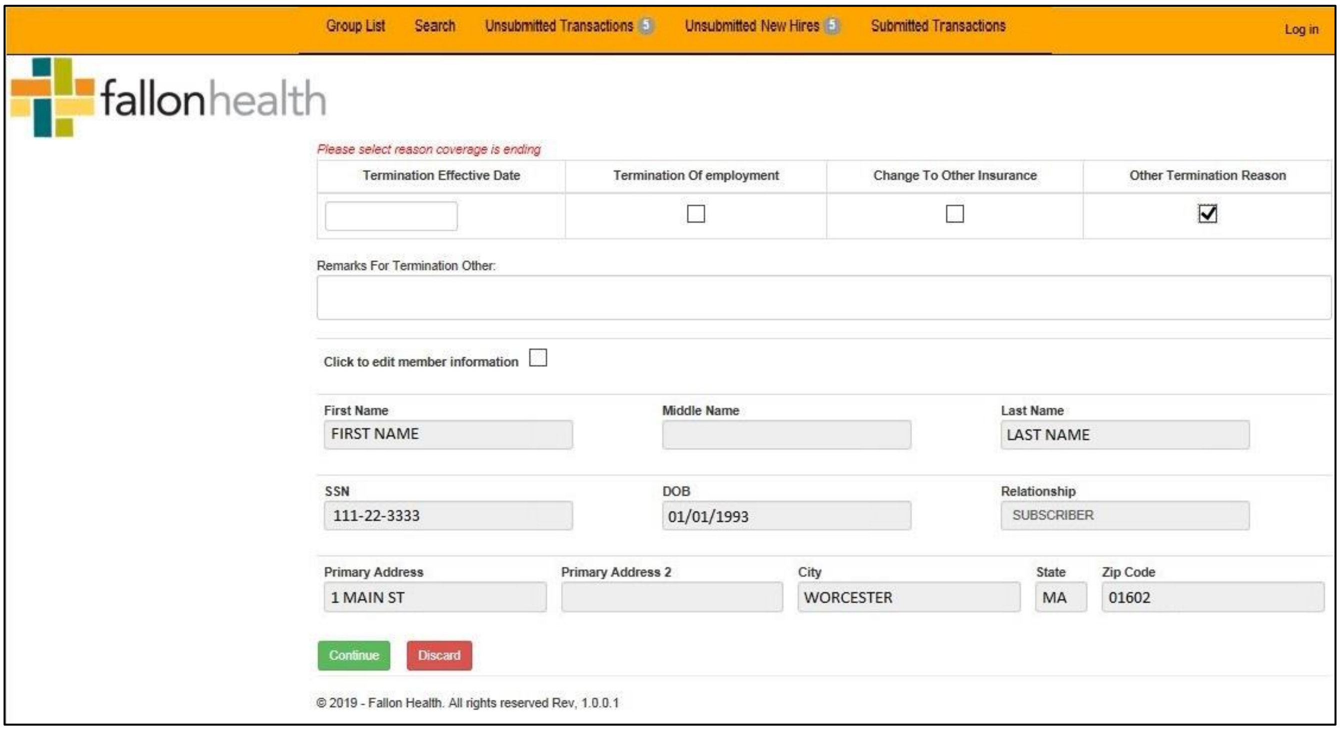
Clicking on OK to Terminate will remove this employee from the Roster.

- ***Change to other Insurance*** *selection* - If the 'Change to Other Insurance' option is selected, 'Name of other insurance' text box appears to allow for this information to be tracked.



After the ‘Continue’ button is clicked, user is given a warning and this subscriber or member will be removed from the Roster.

- ***Other Termination Reason*** *selection* – If the ‘Other Termination Reason’ option is selected, ‘Remarks for Termination Other’ text box appears so that the ‘other’ termination reason can be recorded:

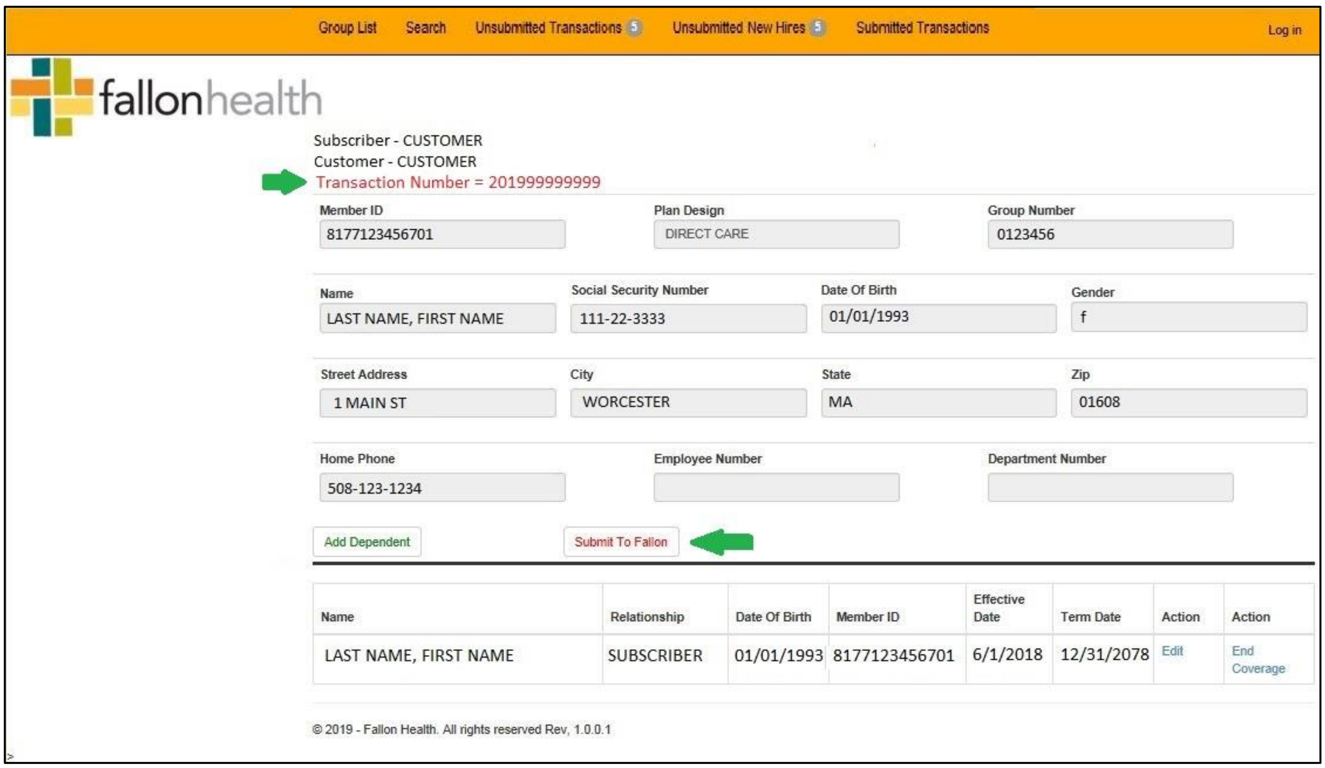


After the ‘Continue’ button is clicked, user is given a warning and this subscriber or member will be removed from the Roster.

Section 7

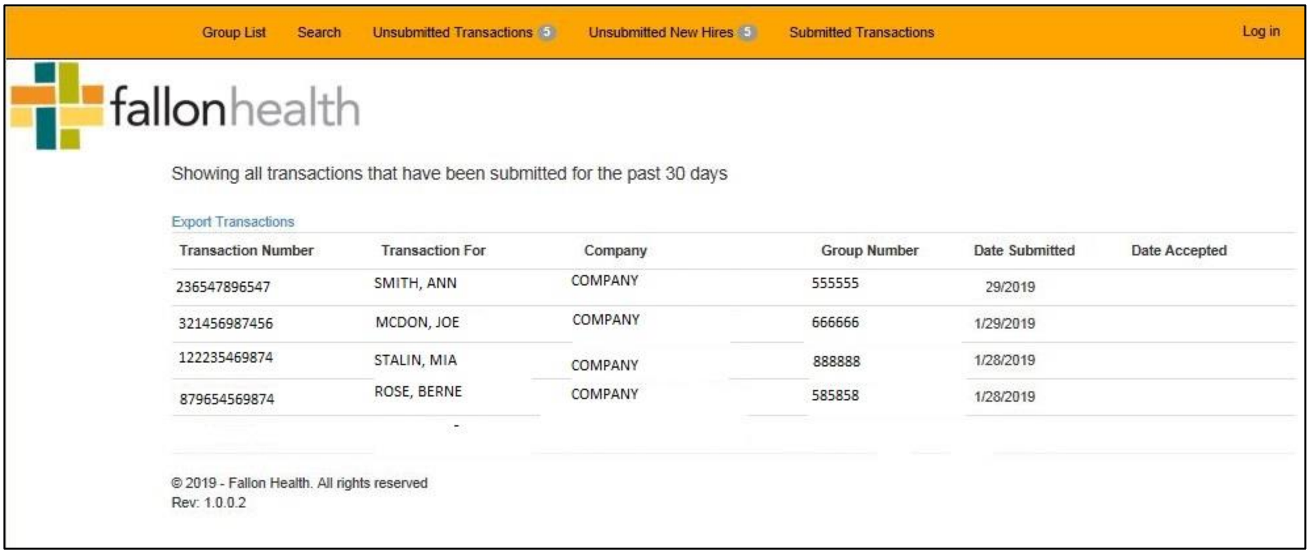
Submitting to Fallon

When a transaction is created by adding information for existing subscriber or editing any existing data, it will display as a Transaction number on the subscriber's page. It will also appear in the Unsubmitted Transactions Tab at the top of the screen. As transactions get added, the Unsubmitted Transactions number is incremented. Once transactions are Submitted to Fallon, the number of Unsubmitted Transactions is decreased. Subscriber's screen below shows a **Submit to Fallon** button and a Transaction number.



User is able to view all Submitted Transactions by clicking on Submitted Transactions within the Orange bar.

User is able to Export Transactions by clicking on the Export Transaction link on the screen.


Group List Search Unsubmitted Transactions 5 Unsubmitted New Hires 5 Submitted Transactions Log in

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Showing all transactions that have been submitted for the past 30 days

Export Transactions

Transaction Number	Transaction For	Company	Group Number	Date Submitted	Date Accepted
236547896547	SMITH, ANN	COMPANY	555555	29/2019	
321456987456	MCDON, JOE	COMPANY	666666	1/29/2019	
122235469874	STALIN, MIA	COMPANY	888888	1/28/2019	
879654569874	ROSE, BERNE	COMPANY	585858	1/28/2019	

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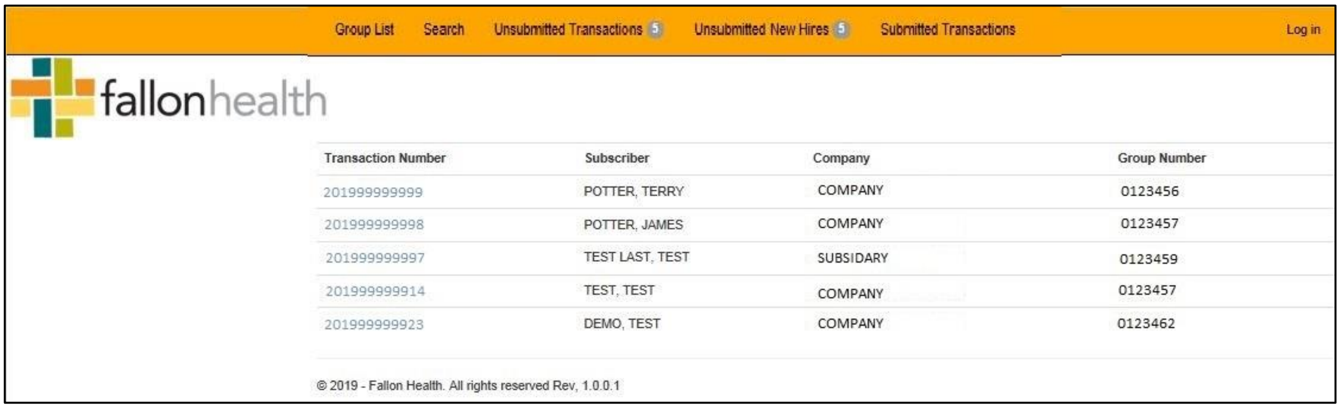
Section 8

Unsubmitted Transactions tab.

As described in Section 7, this tab shows all transactions that have not yet been submitted to Fallon. As Transactions are submitted the number next to ‘Unsubmitted Transactions’ decreases and as new transactions are added, that number is increments.



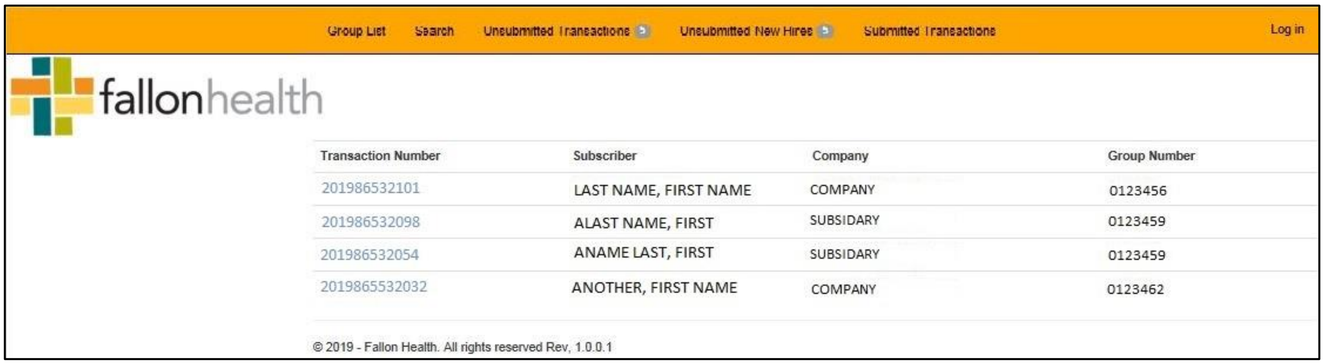
Transaction Number	Subscriber	Company	Group Number
201999999999	POTTER, TERRY	COMPANY	0123456
201999999998	POTTER, JAMES	COMPANY	0123457
201999999997	TEST LAST, TEST	SUBSIDARY	0123459
201999999914	TEST, TEST	COMPANY	0123457
201999999923	DEMO, TEST	COMPANY	0123462

The user can complete a previously saved transaction by clicking on the transaction number. The user should update all data entered. User must click Submit to Fallon to forward the transaction to Fallon for processing.

Section 9

Unsubmitted New Hires

Unsubmitted New Hires keeps count of all New Hires that have been created but not yet Submitted to Fallon. As new hires are added, the number next to Unsubmitted New Hires increments. As these transactions get submitted, the number next to Unsubmitted New Hires decreases.

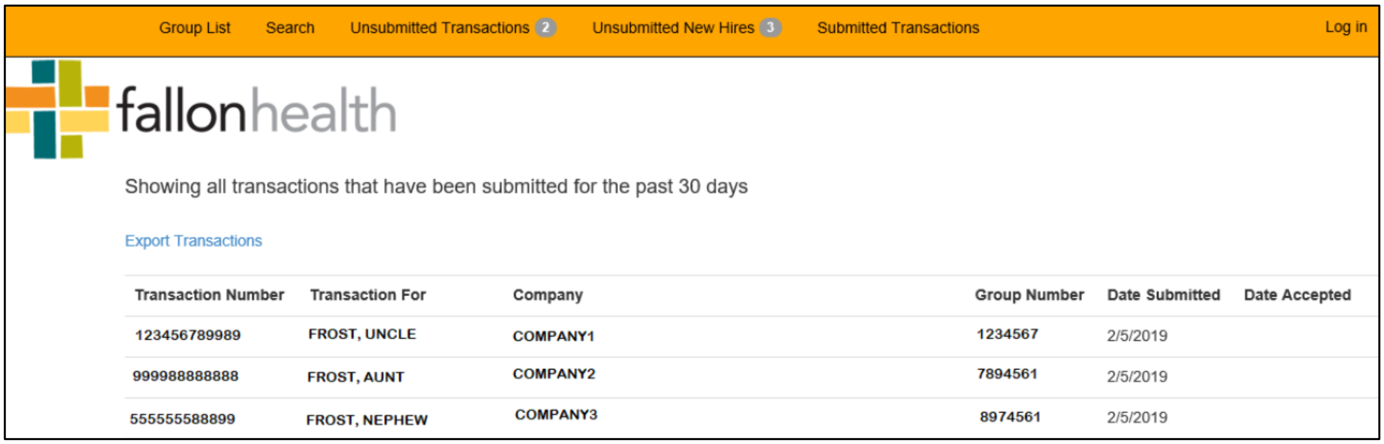


The user can complete a previously saved new hire transaction by clicking on the transaction number. The user should update all data entered. User must click Submit to Fallon to forward the transaction to Fallon for processing.

Section 10

Submitted Transactions

Submitted Transactions tab contains all transactions that have been Submitted to Fallon within the past 30 days. User clicks on the tab for Submitted Transactions and all Submitted transactions present as follows:



Transaction Number	Transaction For	Company	Group Number	Date Submitted	Date Accepted
123456789989	FROST, UNCLE	COMPANY1	1234567	2/5/2019	
999988888888	FROST, AUNT	COMPANY2	7894561	2/5/2019	
555555588899	FROST, NEPHEW	COMPANY3	8974561	2/5/2019	