



## One Source: How to complete a benefit change

1. Login to the OneSource dashboard.

The screenshot shows the OneSource dashboard interface. At the top, there is a search bar with the text "Search..." and a "SEARCH" button. Below the search bar is a navigation menu with items: ACCOUNTS, QUOTES, GROUP SEGMENT, REPORTS, SUPPORT REQUESTS, DENTAL ATTESTATIONS, AGENT PORTAL, SBCS, and MORE. The main heading reads "WELCOME TO BLUE CROSS BLUE SHIELD OF MICHIGAN MANAGING AGENT COMMUNITY!".

On the left, there is a "Dashboard MY DASHBOARD" section with a "Refresh" button and the text "As of May 19, 2021, 9:34 AM Viewing as Julie O'Neill".

Two donut charts are displayed:

- Accounts Report:** A donut chart showing a record count of 9.5k. The chart is labeled "Record Count" and "Account Status Active". Below the chart is a "View Report (Accounts Report)" link.
- Agent Support Requests Report:** A donut chart showing a record count of 152. The chart is divided into three segments: 56 (purple), 81 (blue), and 15 (light blue). The chart is labeled "Record Count" and "Status In Progress". Below the chart is a "View Report (Agent Support Requests Report - open)" link.

On the right, there is an "ACTIONS:" section with two buttons: "Launch New Business Quote" and "Launch New Support Request".

At the bottom right, there is a "What do you want to do today?" section with five buttons: "Quote New Business", "Enroll an Account", "Quote Existing Business", "Group Wide Change", and "Group Maintenance". There is also a button that says "I'll use Instant Guidance later.".

On the far right, there is a vertical "Instant Guidance" button with a question mark icon.

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

The screenshot shows a close-up of the search bar in the OneSource dashboard. The search bar contains the text "288" followed by three dots. To the right of the search bar is a "SEARCH" button. To the right of the "SEARCH" button are icons for a notification bell and a user profile.



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3. Click on “Instant Guidance.”

The screenshot shows the Nexben web application interface. At the top, there is a search bar and a user profile for 'HARVEY L...'. Below the search bar is a navigation menu with options: HOME, MY ACCOUNTS, MY QUOTES, SUPPORT REQUEST, RENEWAL CONTRACTS, and REPORTS. The main content area displays a quote for 'MIDEASTERN MICHIGAN LIB-Quote-AQ'. Under the 'ACTIONS' section, there are buttons for 'Enrollment', 'Document Generation', 'Alternate Quote', and 'Group Wide Changes'. The 'DETAILS' section is expanded, showing fields for Quote Number (00041766), Agent Name (HARVEY LEE), Quote Status (Active), and various dates. A sidebar on the right contains a question mark icon and the text 'Instant Guidance'.

4. Click “Help me with a GWC.”

The screenshot shows the Blue Cross Blue Shield of Michigan help center interface. At the top, there are logos for Blue Cross and Blue Shield of Michigan. Below the logos is the text 'How can we help you?'. There are two tabs: '? Help' and 'Things to do'. A search bar is present with the placeholder text 'Type in your question...'. Below the search bar, a list of help topics is displayed: 'Help me Enroll', 'Help me Quote', 'Help Me Quote Existing Business', 'Help me with a GWC', 'Help me with a Maintenance Change', and 'Open the Underwriting Rules'. The 'Help me with a GWC' option is highlighted with a blue background and a mouse cursor. At the bottom, it says 'powered by ucall'.



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5. Click on “Group Wide Change.”

The screenshot shows the user interface for a quote. At the top, there is a search bar and a navigation menu with options: HOME, MY ACCOUNTS, MY QUOTES, SUPPORT REQUEST, RENEWAL CONTRACTS, and REPORTS. The main content area displays 'Quote: MIDEASTERN MICHIGAN LIB'. Below this, there are four buttons in the 'ACTIONS' section: Enrollment, Document Generation, Alternate Quote, and Group Wide Changes. The 'Group Wide Changes' button is highlighted with a mouse cursor. A tooltip above the button says 'Click Group Wide Change To change the benefits for this Account.' Below the buttons, there are tabs for 'DETAILS' and 'RELATED'. The 'DETAILS' tab is active, showing fields for Quote Number (00041766), Agent Name, Quote Status Information (Active), and various dates (Requested Effective Date: 5/1/2021, Requested Renewal Month: May 1st, Requested Renewal Date: 5/1/2021).

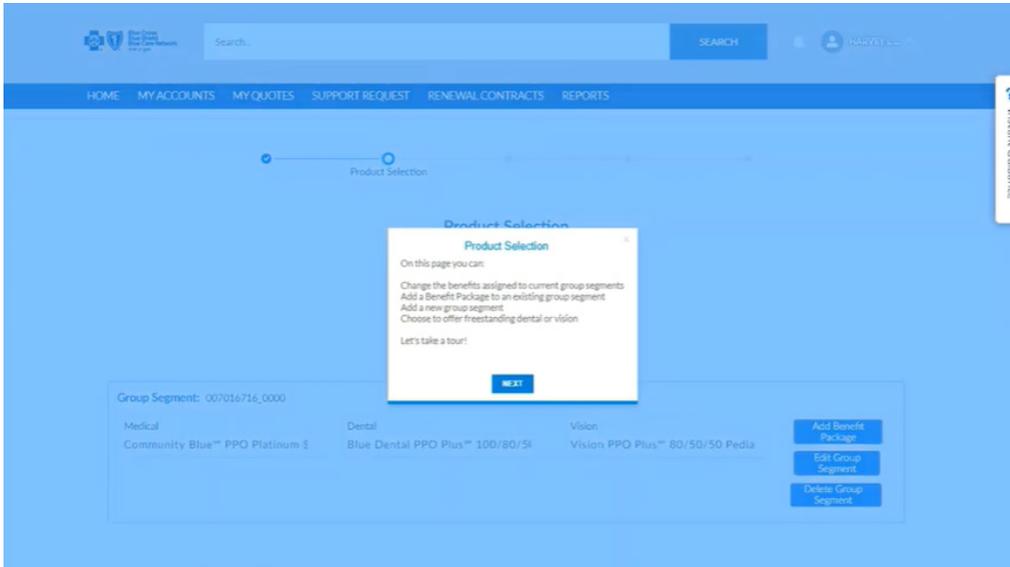
6. Enter the requested effective date.

The screenshot shows the 'Account Information' form. At the top, there is a search bar and a navigation menu. The main content area displays 'Account Information' with a progress indicator. Below this, there are several fields: 'Requested Effective Date' (set to 'May 1 2021'), 'Renewal Month' (set to 'May 1st'), 'Physical Address' (503 S SAGINAW ST #711), 'City' (FLINT), 'State' (MI), 'ZIP Code' (48502), and 'County' (GENESEE). A tooltip above the 'Requested Effective Date' field says 'Select the Requested Effective Date Then click Next at the bottom of the page.' At the bottom of the form, there are 'Cancel' and 'Save for later' buttons.

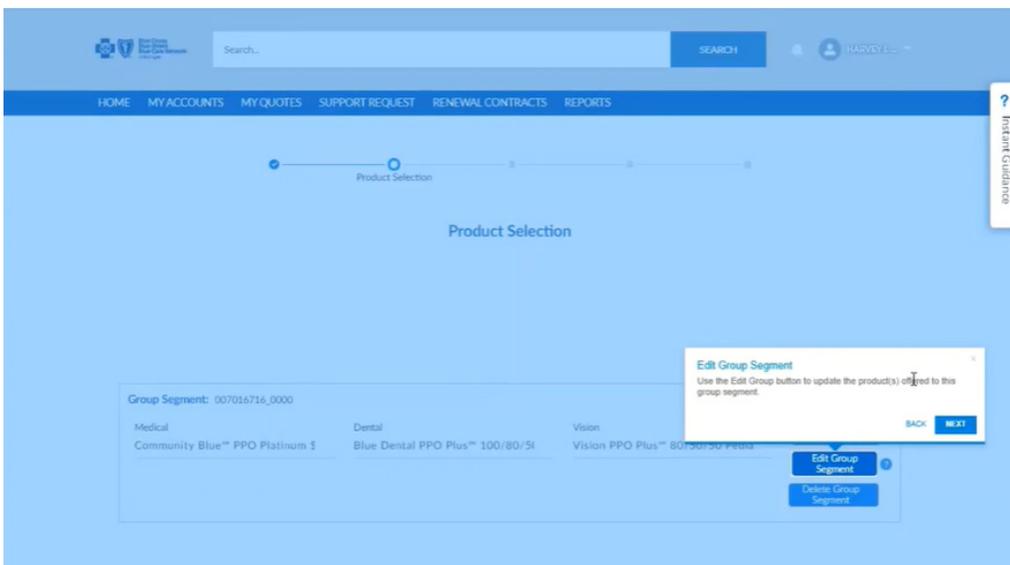


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7. Select products and click on “Next” to begin.



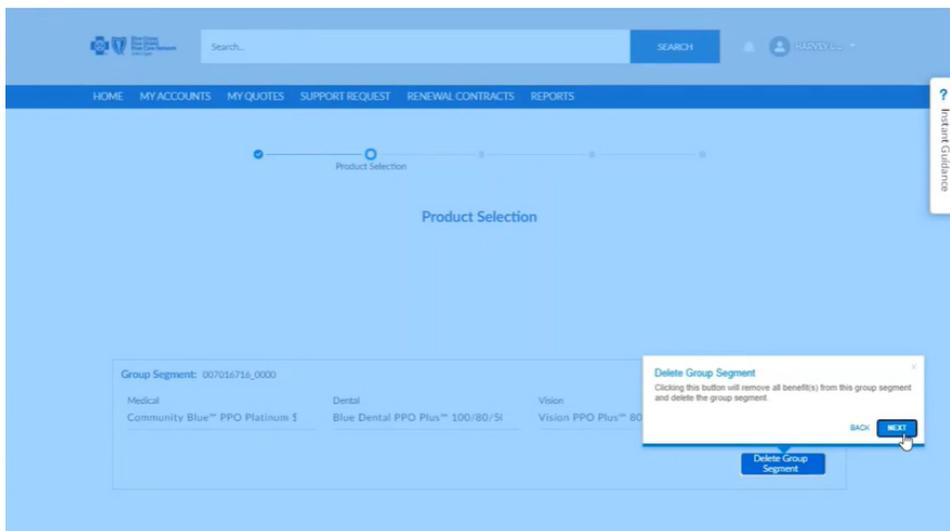
8. Use the “Edit Group” button to update the new products for the group. Click “Next” to proceed.



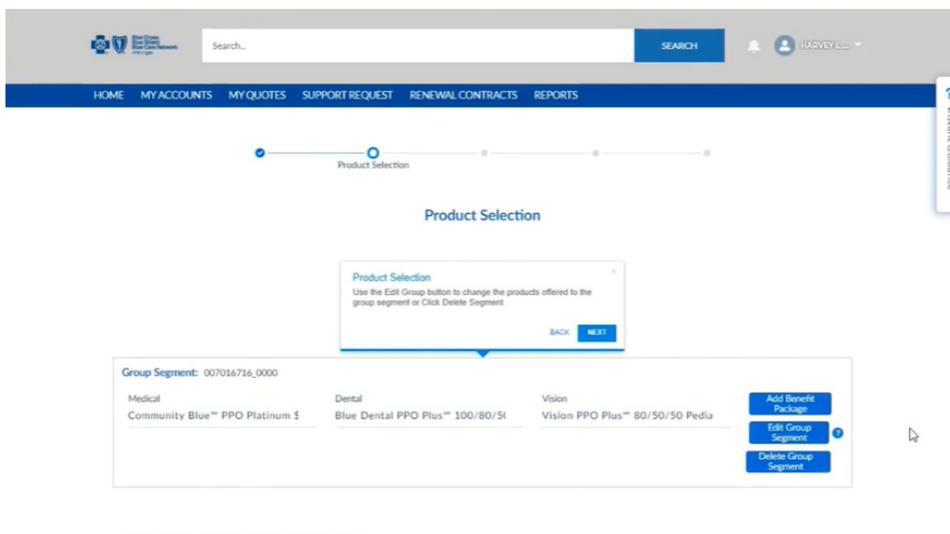


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9. The “Delete” button will remove all benefits as well as group segment. Only click this if the intention is to delete the segment from the group.



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





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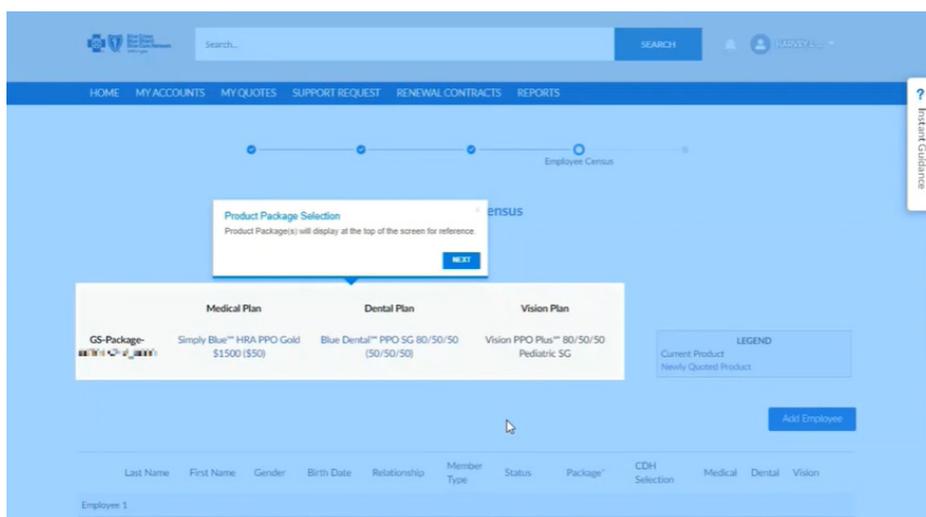
11. A drop down medical box will appear. Use this to change the group's medical package or remove medical from the group. Continue to do this for dental and vision. Once all lines of coverage match the Part C agreement, click "Save Changes" and then "Next."

12. Answer all questions and click "Next."

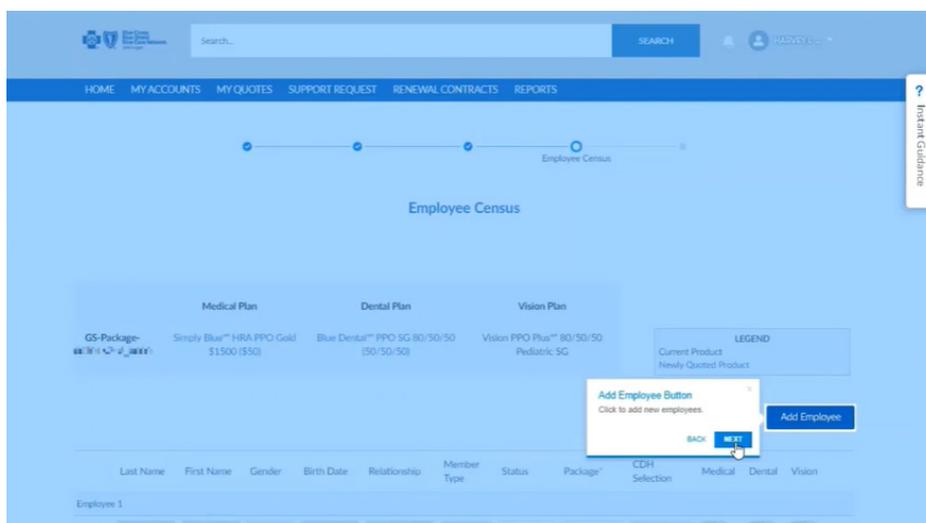


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13. Confirm the selections are correct on the Summary of Groupings page. Click “Next.” The product package will appear at the top of the screen for reference. Click “Next.” Note: Current products are listed in black font, the new products will display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



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





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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	G5-Packag		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employee 2											
✓	lastname	ERIC	11/16/1962	Employee	Regular	Enrolling	G5-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

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

The screenshot shows the 'Group/Agent Contact' step in a multi-step process. The current step is highlighted in the progress bar. The form contains the following elements:

- Group/Agent Contact** (Section Header)
- Instruction: "Please enter the email addresses of the group's representative and agent the required documents / agreements."
- Form Fields:
  - Group Representative Name & Position
  - Group Rep Email
  - Agent Name
  - Agent Email (example: no-reply@bcbsm.com)
- Buttons: "Next", "Previous", "Save for later"
- Modal: A small dialog box titled "Group/Agent Contact" with the text "Select the Group Representative below" and a "NEXT" button.

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

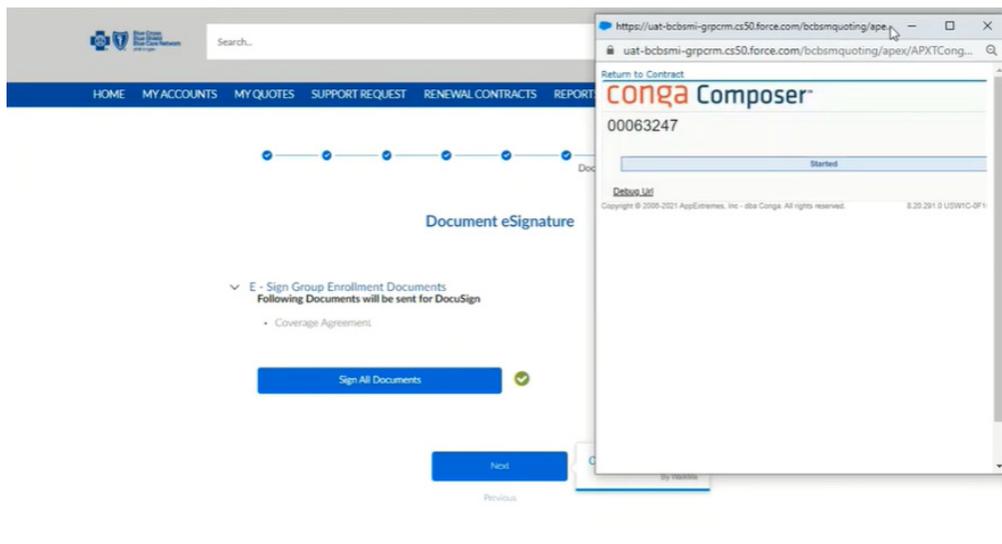
The screenshot shows the 'Document eSignature' step in the process. The current step is highlighted in the progress bar. The form contains the following elements:

- Document eSignature** (Section Header)
- Section: "E - Sign Group Enrollment Documents"
  - Text: "Following Documents will be sent for DocuSign"
    - Coverage Agreement
- Buttons: "Sign All Documents", "Next", "Previous", "Save for later"
- Modal: A dialog box titled "Click Sign All Documents" with the text "This step may take a moment." and a "NEXT" button.

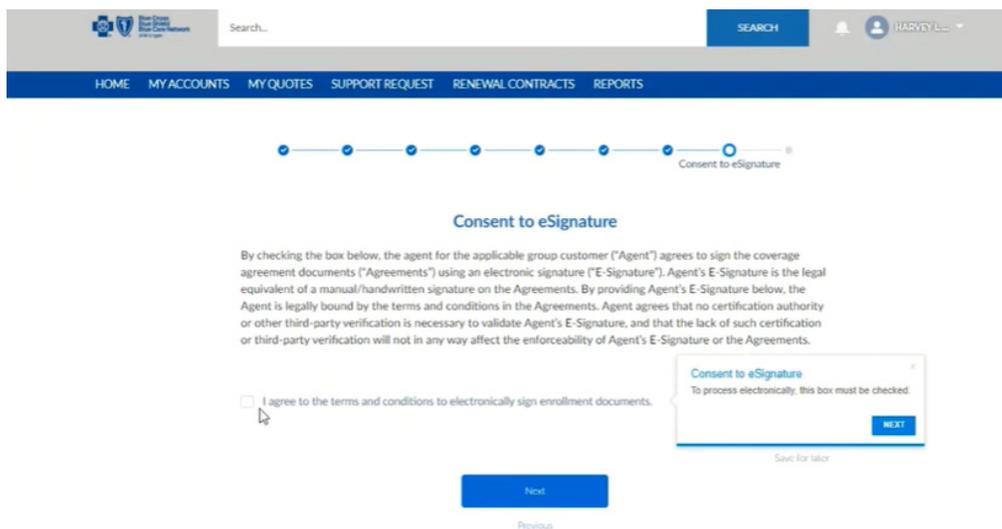


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19. Cogna Composer will load the eSignature documents. Once the documents have been uploaded the Cogna Composer box will disappear. Click “Next.”



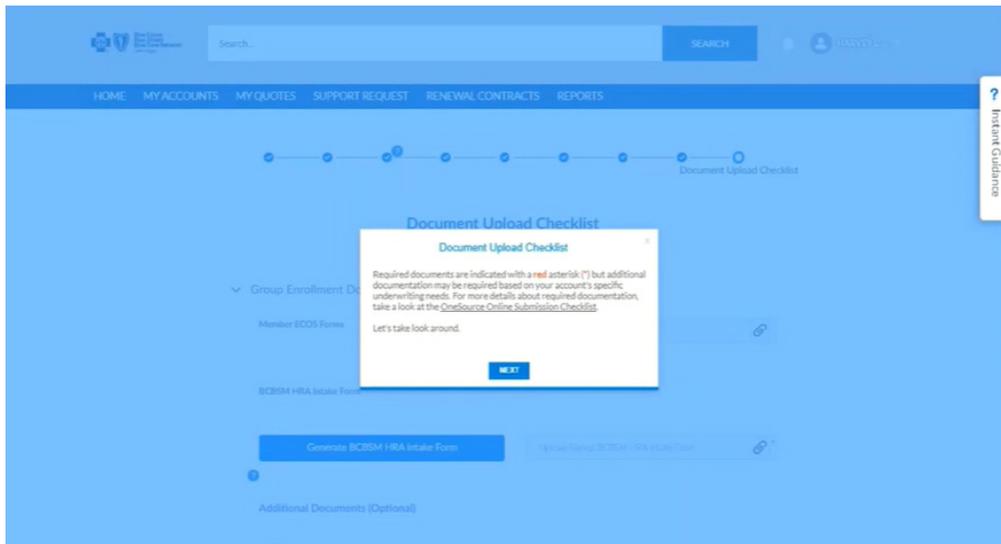
20. The Consent to eSignature page will open. Check the box to agree to the terms and conditions and click “Next.”



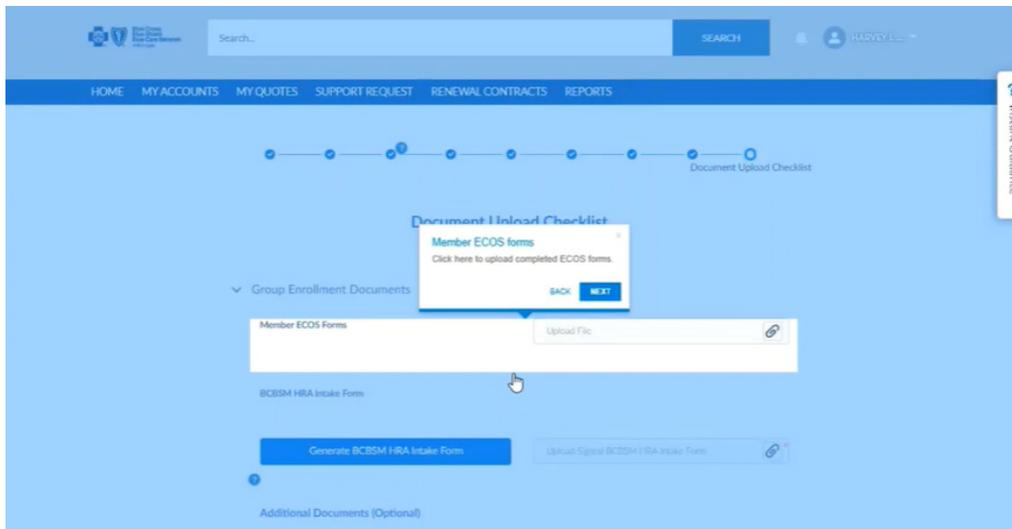


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21. The Document Upload Checklist box will appear. Upload any required documents. Note: required documents are indicated with a red asterisk. Click “Next.”



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





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

24. Confirm and submit, click “Next.”



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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.