Enrollment and Billing Support Form

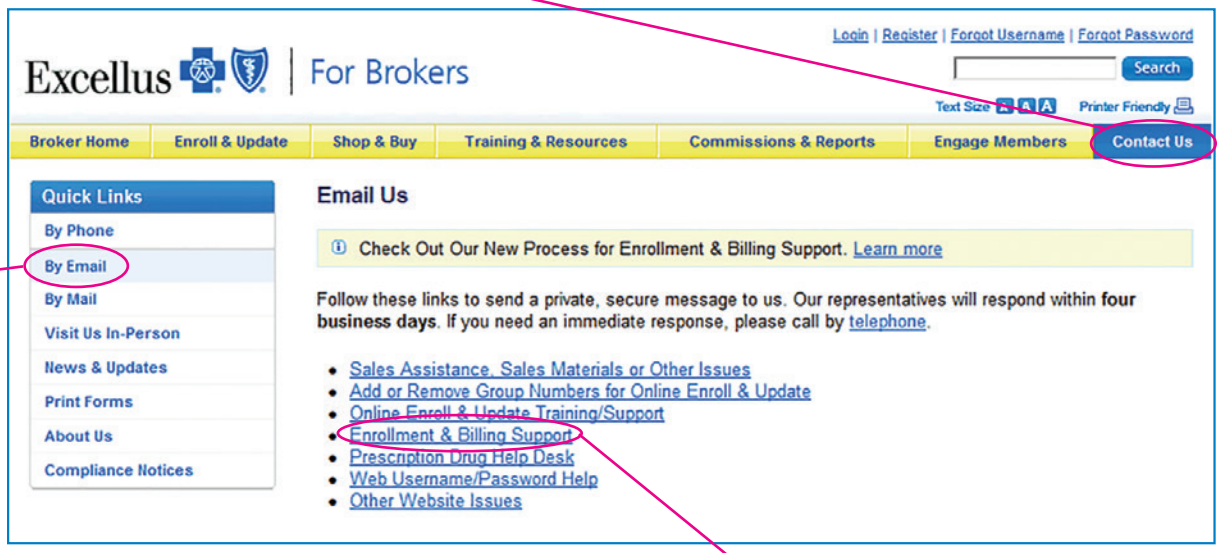
Why use this form?

The purpose of this web based form is to streamline all of your Membership and Billing inquiries and requests. By submitting your inquiries and requests via this form, they are securely transmitted directly to the request management system that is utilized to assign and process requests within our Membership and Billing department. Requests submitted via this online tool can be easily tracked, assigned and managed through completion.

The process is simple; this document outlines how to use the form and what to expect once you submit an inquiry to Membership and Billing.

Accessing the form

1 From the Broker home page of our website, click 'Contact Us' from the upper right hand corner



2 Click 'By Email' from the options on the left

3 Click 'Enrollment & Billing Support'

Using the form

The fields of the form are self-explanatory. To ensure your inquiry is routed appropriately, please review the descriptions below for the 'Reason for Inquiry' field:

- Billing – Use to request copies of invoices.
- E-File – Only groups that have been pre-approved for our e-File enrollment may use this option. Enrollment eFile is an automated solution to make enrollment additions, changes, and terminations in place of submitting paper applications. Please contact your account service team for more information on this enrollment method.
- ID Card Request/Research – Use to submit a request for a new set of ID cards or when requesting a mass reissue of ID cards for an entire group.
- Reconciliation – Use to request pertaining to the posting of funds or to request a reconciliation worksheet of payment activity.
- Subscriber/Member – Use for member activity, new enrollments (single or multiple enrollments), member additions to existing contracts, membership changes, terminations, general questions and research. All appropriate paperwork must accompany the request and required fields must be completed.

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Tracking System and Notifications

You will be notified when your inquiry is received, assigned and completed.

- Inquiry Received: As soon as your inquiry is submitted, you will receive a pop up message indicating that your inquiry was received. This is a system generated generic message; there are no timeframes or specific information noted.
- Tracking Number: When your inquiry has been assigned internally, you will receive an automated email from the system which will include a tracking number. The tracking number can be referred to with any questions related to the inquiry. It will take up to 1 business day for you to receive your tracking number.
- Complete: This email will advise that the inquiry was completed. The tracking number and resolution to the inquiry will be provided in this email. If for some reason the request was not completed as requested, please reach out to your dedicated support representative with the tracking number.
- Closed – No Action Taken: If your inquiry does not contain the necessary information to complete, it will be closed without any action taken. A detailed description of the reason for closing out the inquiry will be provided in this email. A subsequent request will need to be filled out with the necessary information if this is asked for in the closure notification. If questions about it exist, utilize the tracking number when contacting your dedicated support representative.

Additional Information Regarding Future Enhancements:

Please note that the following enhancements are in process; we are unsure of the exact timeframe that they will be in production.

- Currently, the email you receive with your tracking number does not contain specific information about the inquiry. An effort is underway to have this information pulled into the email.
  - Based on the type of inquiry, the automated email sent to you could contain the group name, group number, broker name, subscriber name, subscriber ID#, and the membership inquiry number
- A "Print Friendly" button will be added on the input and confirmation screens so you can print relevant/important pages for your records.
- Examples of each reason option will be displayed to be sure you selected the right reason for your inquiry. This will help to ensure the inquiry is routed to the appropriate area for resolution.

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