

Broker Enrollment Portal User Guide

Your resource for navigating the BSWHP broker portal

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Introduction

Welcome to the enhanced BSWHP Broker enrollment portal

Our enhanced enrollment experience has been redesigned to provide a more intuitive, efficient, and user-friendly way to manage employee and dependent enrollments, eligibility changes, benefit elections, demographic updates, and coverage maintenance activities.

The new portal enrollment design streamlines your data entry into a well-organized and defined “Guided enrollment process” that reduces manual data entry, improves transaction accuracy, and provides greater visibility into the status of your enrollment requests.

Available 24 hours a day, 7 days a week, the self-service portal allows brokers to perform a variety of enrollment functions in a secure online environment, including:

- Adding new employees and dependents
- Managing Open Enrollment and qualifying life event transactions
- Updating demographic information
- Uploading required supporting documentation
- Viewing and managing Medical, Dental, and Life benefit elections
- Processing COBRA enrollments (when applicable)
- Managing subaccount changes
- Terminating coverage
- Accessing and printing member ID cards
- Tracking enrollment transaction status
- Downloading enrollment confirmations and summaries for audit and recordkeeping purposes

The enhanced portal incorporates automated business rules to calculate eligibility dates, waiting periods, and effective dates, helping ensure that enrollment submissions are processed accurately and consistently. New features such as enrollment status tracking, document upload capabilities, auto-populated information, downloadable confirmations, and improved user guidance provide a more seamless enrollment experience for Brokers.

Whether you are enrolling a new employee, updating existing member information, managing benefit changes, or submitting supporting documentation, this guide will walk you through each step of the enrollment process and provide helpful tips, examples, and frequently asked questions to assist you along the way.

Need portal access?

New External users must register before accessing enrollment features.

Please refer to the [Broker Portal User Registration Guide](#) for step-by-step instructions on creating and managing your portal account or simply by clicking on this link [Broker portal](#) to register for your portal account.

Who should use this guide?

This guide is intended for:

- Benefits Administrators
- Brokers and Broker Support Staff
- Authorized Enrollment Representatives

Use this guide as your primary resource for completing enrollment transactions and maintaining employee and dependent coverage through the BSWHP Broker Enrollment Portal.

Getting started

Before beginning an enrollment transaction, ensure you have:

- ✓ Active portal access
- ✓ Employee and dependent demographic information
- ✓ Required supporting documentation (when applicable)
- ✓ Benefit election information
- ✓ Qualifying event details and event dates

Having this information readily available will help ensure a smooth and efficient enrollment experience.

Let's get started and explore the powerful features available through the enhanced BSWHP Broker Enrollment Portal.

Enrollment changes are easiest when you have the employee's personal information, dependent information, event dates, and supporting documentation available before beginning the transaction. This helps ensure faster processing and reduces delays related to incomplete submissions.

Terminology & definitions

Helpful terms to understand as you walk through the different enrollment transactions.

Enrollment portal terminology guide

Term	Definition
Active Employee	An employee who is currently employed and eligible for benefits coverage.
Anniversary Period	The annual period when a group may review and make changes to benefit elections.
Benefit Plan	The specific medical, dental, or life insurance plan selected for coverage.
Broker	An authorized representative who assists employers with benefit administration and enrollment activities.
COBRA	A continuation of health coverage that allows eligible individuals to maintain benefits after certain qualifying events such as termination of employment.
Coordination of Benefits (COB)	Information collected when a member has coverage through more than one insurance carrier.
Court Ordered Dependent	A dependent who must be covered under a court-issued order requiring health insurance coverage.
Covered Dependent	An eligible spouse or child enrolled under an employee's benefit coverage.
Dental Plan	A benefit plan that provides coverage for dental services.
Effective Date	The date benefits begin or end based on the enrollment event and eligibility rules.
Employer Administrator	The individual who is authorized to manage employee benefit enrollments on behalf of an employer group.
Enrollment Event	The reason an enrollment changes is being requested, such as a new hire, marriage, birth, or loss of other coverage.
Enrollment Event Date	The date of the qualifying event occurred. This date is used to determine eligibility and effective dates.
Group	An employer organization that offers health benefits to its employees.
Life Insurance Plan	A benefit providing life insurance coverage for eligible employees.
Mailing Address	An address where correspondence should be sent if different from the residential address.
Medical Plan	A health insurance plan providing medical and healthcare coverage.
Member	Any individual covered under the health plan, including employees and dependents.

New Employee	An employee who is newly hired and becomes eligible for benefits.
Open Enrollment (OE)	A designated period when eligible employees may enroll in or make changes to their benefit coverage without a qualifying event.
Other Insurance	Coverage the member has through another health insurance carrier.
Primary Language	The language is preferred by the member for communication purposes.
Qualifying Event	A life event that allows an employee or dependent to enroll in or change coverage outside of Open Enrollment. Examples include marriage, birth, adoption, or loss of other coverage.
Residential Address	The member's physical home address.
Retired Employee	A former employee who remains eligible for specific benefits based on group rules.
Save As Draft	A portal feature that allows users to save enrollment information and return later to complete the transaction.
Subscriber	The primary employee enrolled in coverage. The portal uses the term Active Employee instead.
Subscriber Number	The unique identification number assigned to the employee's health plan coverage.
Subaccount	A specific division, location, or business unit within an employer group.
Termination of Benefits	The voluntary ending of selected benefit coverage while employment remains active.
Termination of Employment	The end of an employee's employment relationship with the employer.
Waiting Period	The amount of time an employee must wait before becoming eligible for benefits coverage after hire.
Employment Status	Indicates whether an individual is an Active Employee or Retired Employee.

Common enrollment events

Enrollment Event	Description
New Employee	Newly hired employee enrolling for benefits.
Marriage	Employee gets married and wishes to add a spouse or update coverage.

Birth	Employee adds a newborn child to coverage.
Adoption	Employee adds an adopted child to coverage.
Loss of Other Coverage	Employee loses other health insurance and needs coverage.
Court Ordered Dependent	Dependent coverage required by court order.
COBRA Election	Eligible individual elects COBRA continuation coverage.
Death	Coverage termination due to death.
Termination of Employment	Coverage ends because employment has ended.

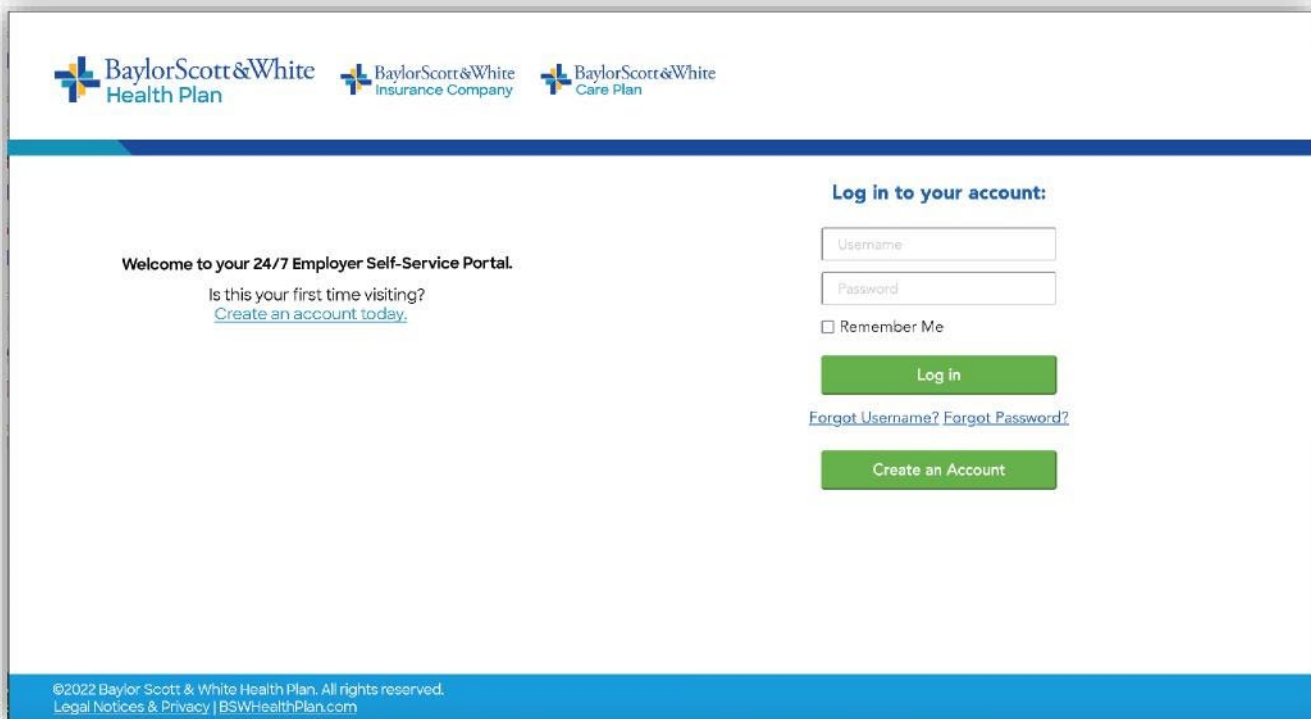
Acronyms Used in the Guide

Acronym	Meaning
COB	Coordination of Benefits
COBRA	Consolidated Omnibus Budget Reconciliation Act
OE	Open Enrollment
PDF	Portable Document Format
SSN	Social Security Number

Accessing the portal for external users

[Log in/ Create Account](#)

If you have already set up your account: Go to [BSWHP Broker Portal](#) and enter your username and password. Click Log In to proceed.

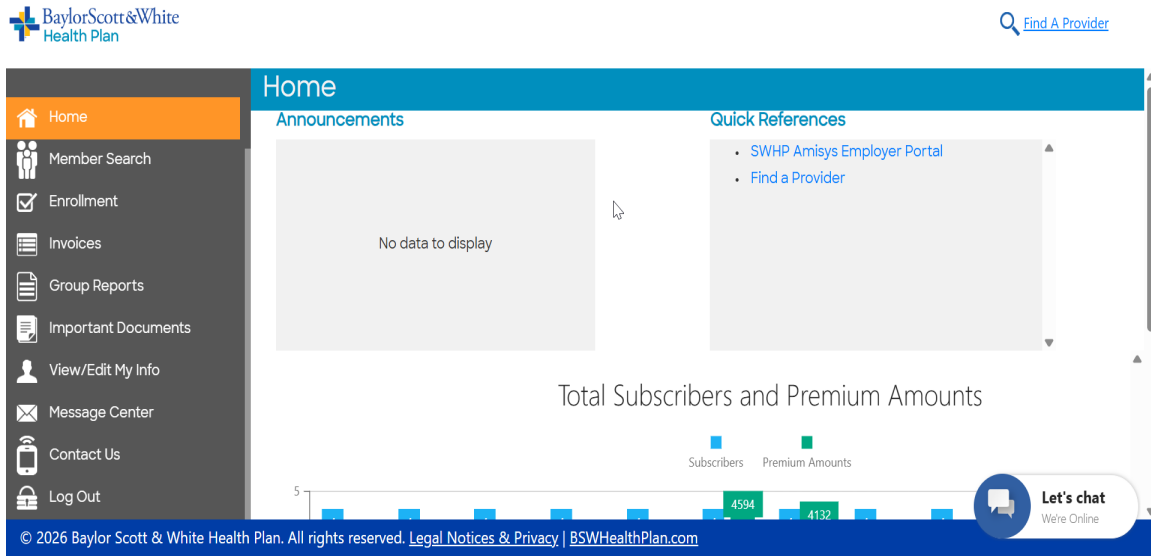


The screenshot shows the login page for the Baylor Scott & White Health Plan. At the top, there are three logos: the main Health Plan logo, the Insurance Company logo, and the Care Plan logo. Below the logos, on the left, is a welcome message: "Welcome to your 24/7 Employer Self-Service Portal." followed by "Is this your first time visiting?" and a link "Create an account today." On the right, under the heading "Log in to your account:", there are input fields for "Username" and "Password", a checkbox for "Remember Me", a green "Log in" button, a link "Forgot Username? Forgot Password?", and a green "Create an Account" button. At the bottom, a blue footer bar contains the copyright notice: "©2022 Baylor Scott & White Health Plan. All rights reserved. Legal Notices & Privacy | BSWHealthPlan.com".

Viewing home screen

The home screen allows you to navigate to the area of interest, so you can find what you need at your fingertips.

- See the latest Announcements
- Quick References
- Quick Glance at Total Subscribers and Premium Amounts
- View Members
- Enrollment transactions
- See Invoices
- Group Reports
- Important Documents
- View/ Edit My Information
- Message Center- New Upgrade coming soon
- Contact Us
- Log out



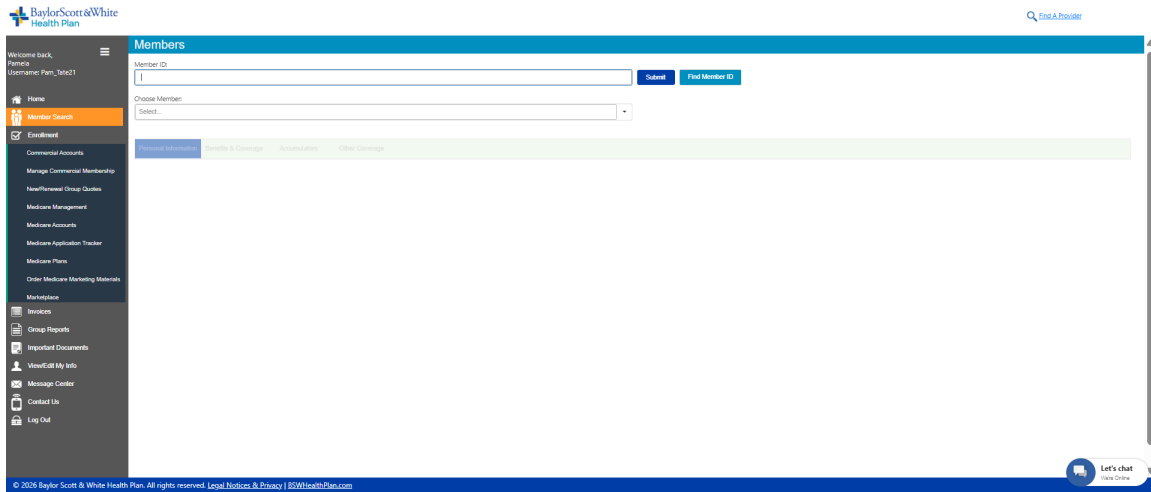
Viewing member ID cards

To access Member ID Cards, log in to the portal and select Member Search in the left navigation.

- Enter the member ID and click Submit, or
- Select Find Member ID to search by First Name, Last Name, Date of Birth or Account ID
- Click View ID Cards

You can also view Member ID Cards from the Enrollment section of the portal.

- From Membership Search in the left navigation
- Search by the member ID or by the member's name
- Click submit
- Click View ID Cards Or Request New ID Card
- Or you can also go to Current Membership in the left navigation menu
- Click on the listed member or search by member name in the search bar
- Click on the member to view benefit and coverage information



Members

Member ID:

Find Member ID

Choose Member:

Personal Information | **Health & Coverage** | Accounts | Other Coverage

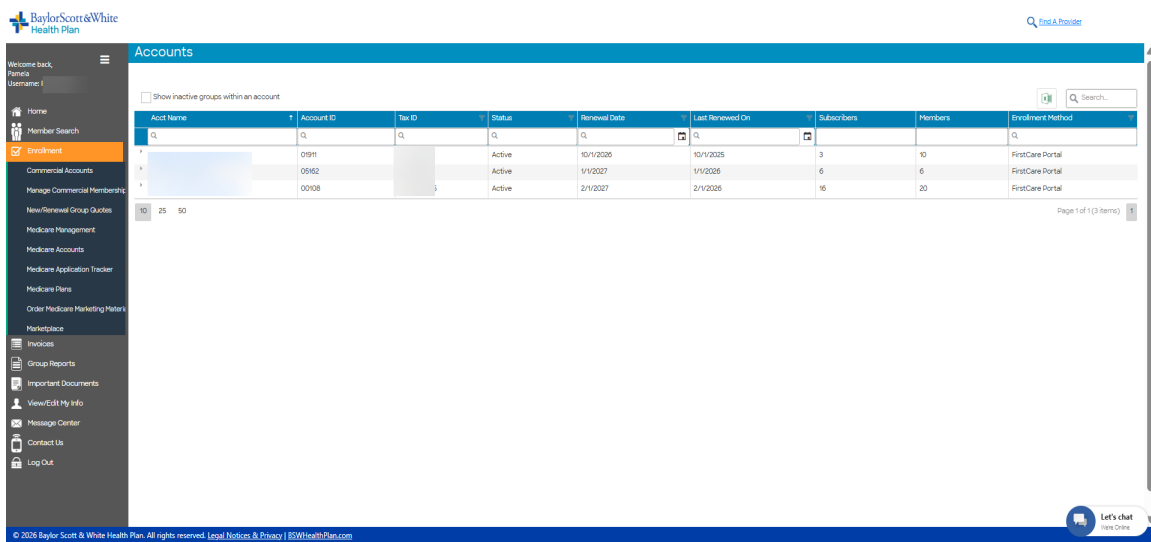
Accounts

Account Name	Account ID	Tax ID	Status	Renewal Date	Last Renewed On	Subscribers	Members	Enrollment Method
CL	CL	CL	CL	CL	CL	CL	CL	CL
	01911		Active	10/1/2026	10/1/2025	3	10	First Care Portal
	05952		Active	1/1/2027	1/1/2026	6	6	First Care Portal
	00108		Active	2/1/2027	2/1/2026	16	20	First Care Portal

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Enrollment dashboard

Current Membership To access Current Online Enrollment, log in to the portal and select Enrollment, then Current Membership in the left navigation. This will give you the ability to view your Account ID/ Group and view any subaccounts associated to your account.

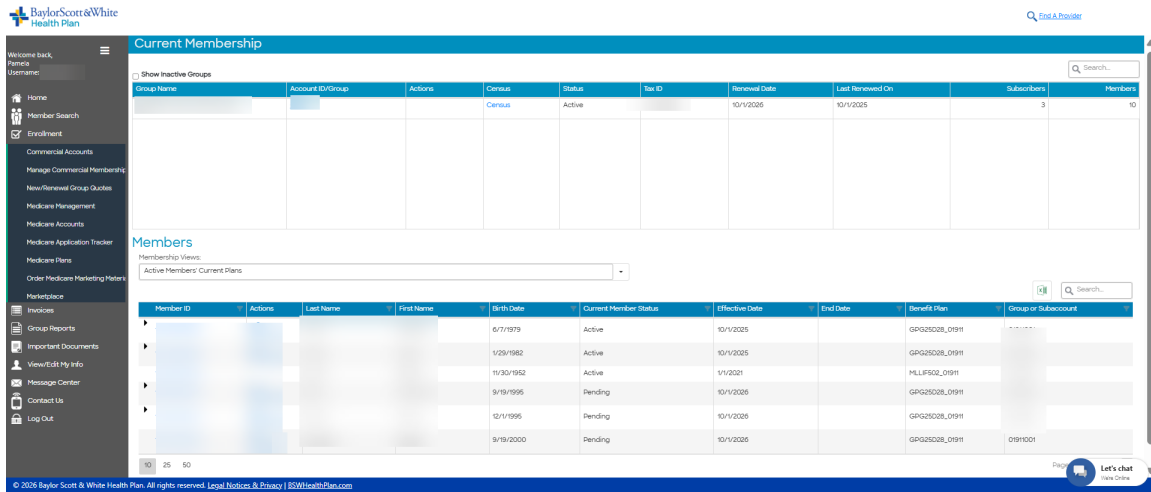


Accounts

☐ Show inactive groups within an account

Account Name	Account ID	Tax ID	Status	Renewal Date	Last Renewed On	Subscribers	Members	Enrollment Method
CL	CL	CL	CL	CL	CL	CL	CL	CL
	01911		Active	10/1/2026	10/1/2025	3	10	First Care Portal
	05952		Active	1/1/2027	1/1/2026	6	6	First Care Portal
	00108		Active	2/1/2027	2/1/2026	16	20	First Care Portal

Page 1 of 1 (3 items)



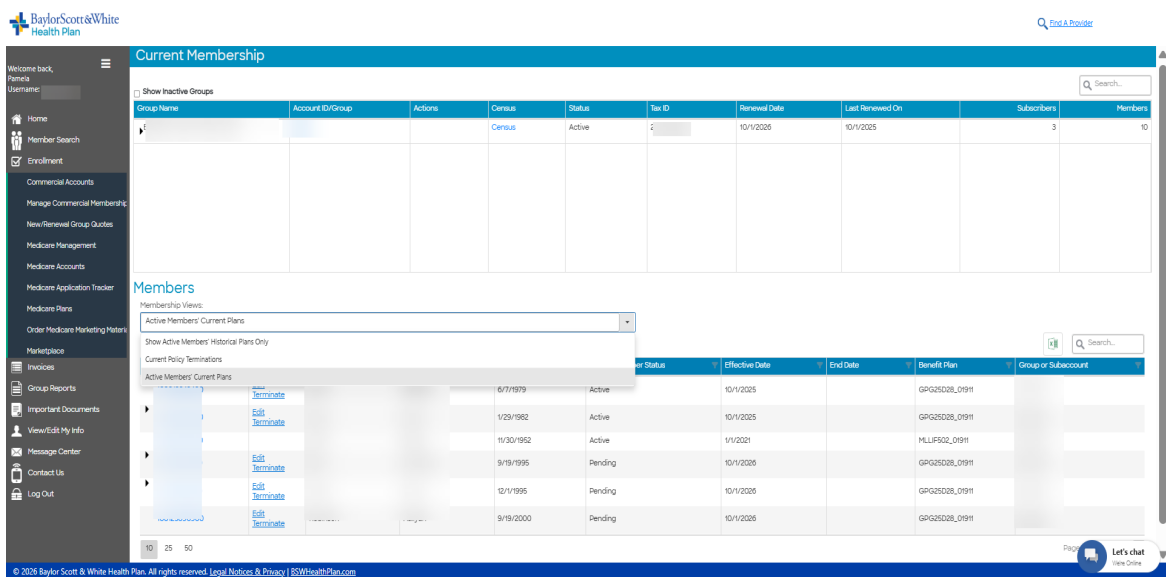
Current Membership

Membership Views: Active Members' Current Plans

Group Name	Account ID/Group	Actions	Census	Status	Tax ID	Renewal Date	Last Renewed On	Subscribers	Members
			Census	Active		10/1/2025	10/1/2025	3	10

Member ID	Actions	Last Name	First Name	Birth Date	Current Member Status	Effective Date	End Date	Benefit Plan	Group or Subaccount
				6/1/1979	Active	10/1/2025		GPQ25028_019H	
				1/29/1982	Active	10/1/2025		GPQ25028_019H	
				11/30/1952	Active	1/1/2021		MLLF502_019H	
				9/19/1995	Pending	10/1/2026		GPQ25028_019H	
				12/1/1995	Pending	10/1/2026		GPQ25028_019H	
				9/19/2000	Pending	10/1/2026		GPQ25028_019H	0191001

1. Scrolling down, you will see your current employee enrollments for Active Members' Current Plans, Current Policy Terminations, or Show Active Members' Historical Plan Only. There are short cuts to managing your membership through editing, terminating, and adding dependents.



Current Membership

Membership Views: Active Members' Current Plans

Show Active Members' Historical Plans Only

Current Policy Terminations

Active Members' Current Plans

Group Name	Account ID/Group	Actions	Census	Status	Tax ID	Renewal Date	Last Renewed On	Subscribers	Members
			Census	Active		10/1/2025	10/1/2025	3	10

Member ID	Actions	Last Name	First Name	Birth Date	Current Member Status	Effective Date	End Date	Benefit Plan	Group or Subaccount
	Edit Terminate			6/1/1979	Active	10/1/2025		GPQ25028_019H	
	Edit Terminate			1/29/1982	Active	10/1/2025		GPQ25028_019H	
	Edit Terminate			11/30/1952	Active	1/1/2021		MLLF502_019H	
	Edit Terminate			9/19/1995	Pending	10/1/2026		GPQ25028_019H	
	Edit Terminate			12/1/1995	Pending	10/1/2026		GPQ25028_019H	
	Edit Terminate			9/19/2000	Pending	10/1/2026		GPQ25028_019H	0191001

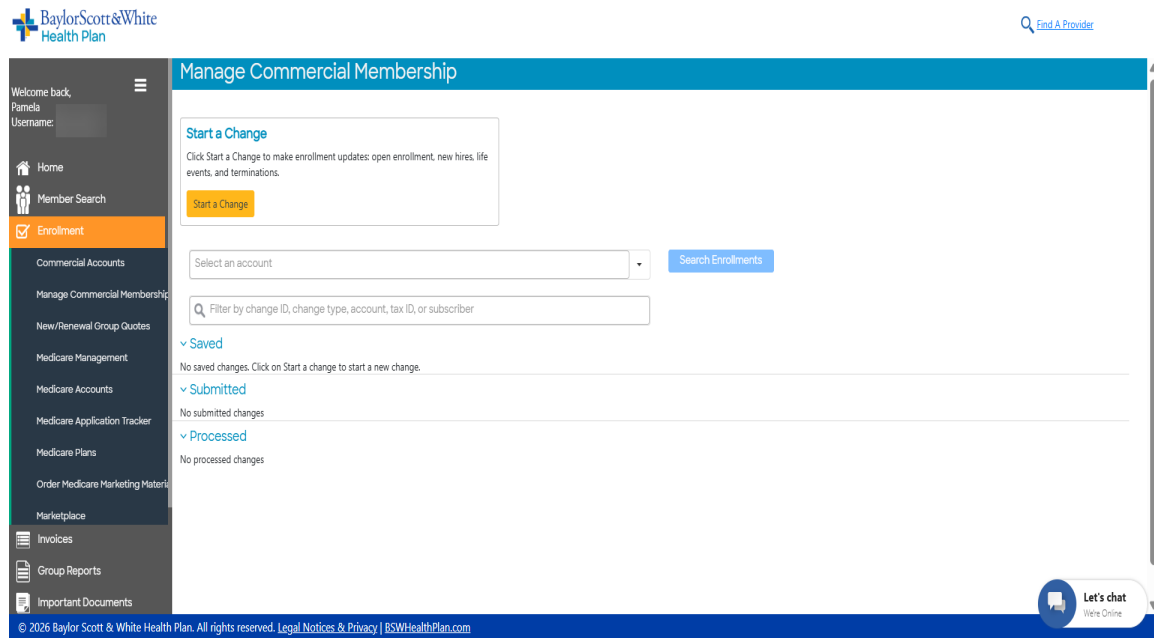
Manage commercial membership

From the Enrollment tab you can Manage membership by clicking on Manage Commercial Membership tab. Click on Start a Change and walk through the Guided enrollment transaction.

From this Manage Commercial Membership dashboard screen you can see the Enrollments and/or Changes that you the user has started or other users

from your brokerage or from your employer group client that have access to the Group Account under the Saved Enrollments, Submitted Enrollments, and Processed Enrollments.

Broker portal



Manage Commercial Membership

Welcome back, Pamela
Username: [redacted]

Home
Member Search
Enrollment
Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Material
Marketplace
Invoices
Group Reports
Important Documents

Find A Provider

Start a Change
Click Start a Change to make enrollment updates: open enrollment, new hires, life events, and terminations.
[Start a Change](#)

Select an account [dropdown]
[Search Enrollments](#)

Filter by change ID, change type, account, tax ID, or subscriber [input]

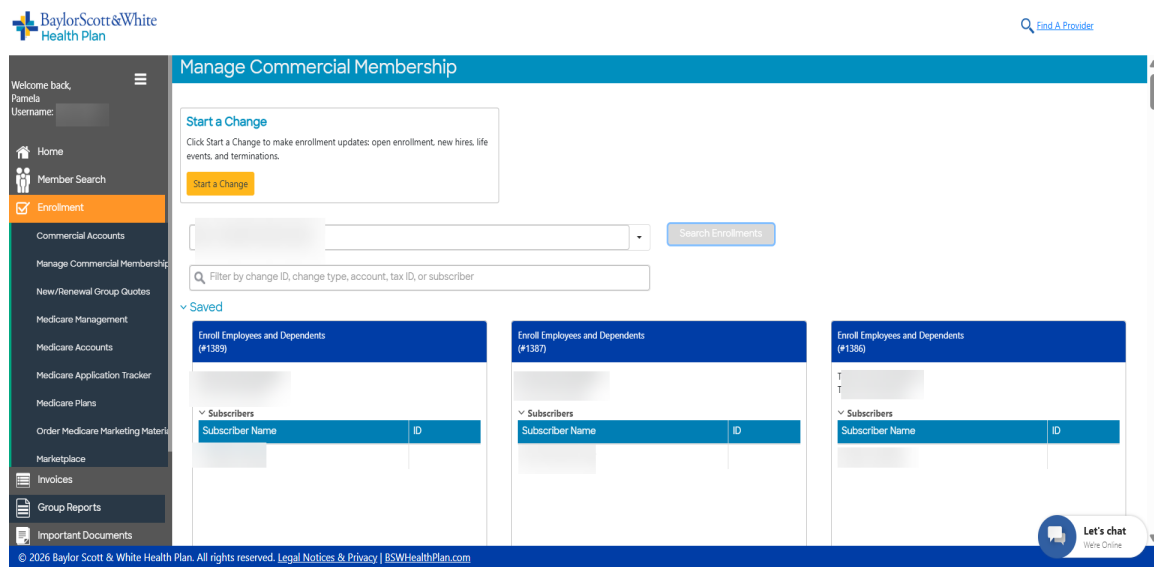
▼ **Saved**
No saved changes. Click on Start a change to start a new change.

▼ **Submitted**
No submitted changes

▼ **Processed**
No processed changes

Let's chat
View Online

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Manage Commercial Membership

Welcome back, Pamela
Username: [redacted]

Home
Member Search
Enrollment
Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
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Important Documents

Find A Provider

Start a Change
Click Start a Change to make enrollment updates: open enrollment, new hires, life events, and terminations.
[Start a Change](#)

[dropdown]
[Search Enrollments](#)

Filter by change ID, change type, account, tax ID, or subscriber [input]

▼ **Saved**

Enroll Employees and Dependents (#1389)	
▼ Subscribers	
Subscriber Name	ID
[redacted]	[redacted]

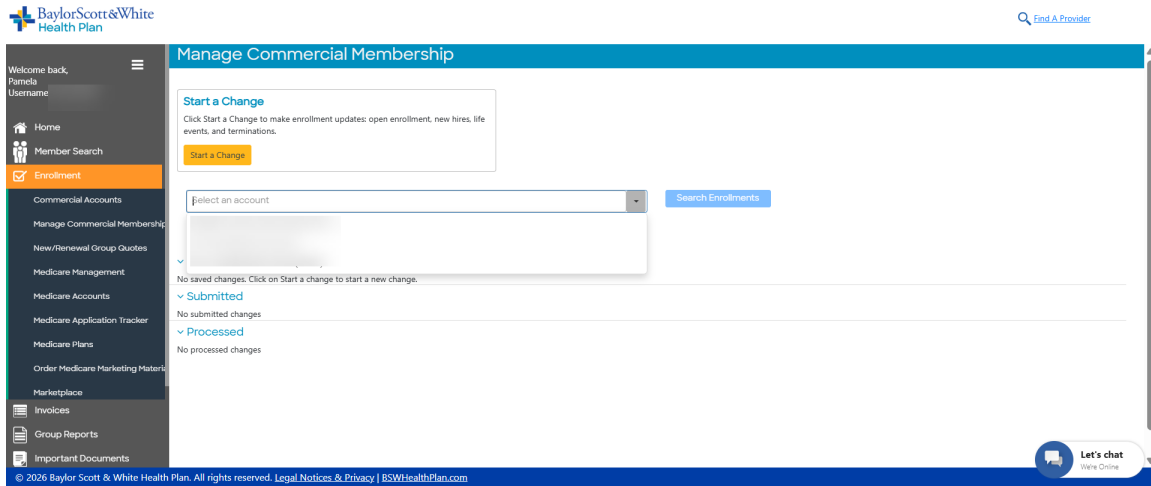
Enroll Employees and Dependents (#1387)	
▼ Subscribers	
Subscriber Name	ID
[redacted]	[redacted]

Enroll Employees and Dependents (#1390)	
▼ Subscribers	
Subscriber Name	ID
[redacted]	[redacted]

Let's chat
View Online

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Click on the dropdown for Select Account then click on Search Enrollments to see what has been Saved, Submitted, and Processed.



Welcome back, Pamela
Username: [redacted]

Home
Member Search
Enrollment
Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Materials
Marketplace
Invoices
Group Reports
Important Documents

Find A Provider

Manage Commercial Membership

Start a Change
Click Start a Change to make enrollment updates: open enrollment, new hires, life events, and terminations.

[Start a Change](#)

Select an account [dropdown menu]

[Search Enrollments](#)

No saved changes. Click on Start a change to start a new change.

Submitted
No submitted changes

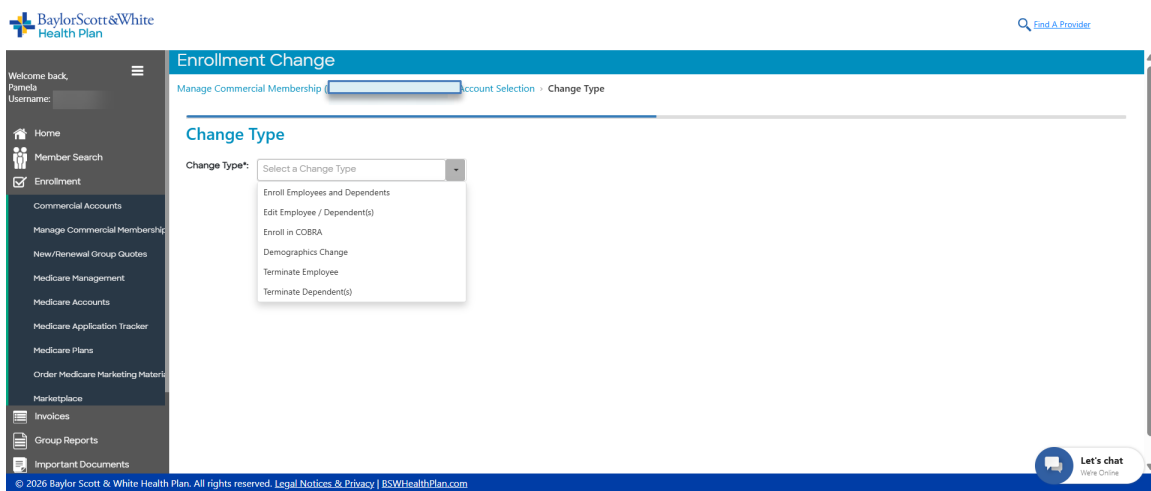
Processed
No processed changes

Let's chat
Write Online

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Starting a membership change

- Click Start a change
- Click on the Account Name and click Continue
- Click on Change Type
 - Select on the options listed
 - Open Enrollment (will only see this option if your group is currently in their Annual Enrollment Period)
 - Enroll Employee(s) and Dependent(s)
 - Edit Employee /Dependent(s)
 - Enroll in Cobra
 - Demographics Change
 - Terminate Employee
 - Terminate Dependent(s)
 - Click on Continue with Guided Membership Change



Welcome back, Pamela
Username: [redacted]

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Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
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Medicare Plans
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Invoices
Group Reports
Important Documents

Find A Provider

Enrollment Change

Manage Commercial Membership [dropdown menu] Account Selection > Change Type

Change Type

Change Type*: Select a Change Type [dropdown menu]

- Enroll Employees and Dependents
- Edit Employee / Dependent(s)
- Enroll in COBRA
- Demographics Change
- Terminate Employee
- Terminate Dependent(s)

Let's chat
Write Online

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Open Enrollment

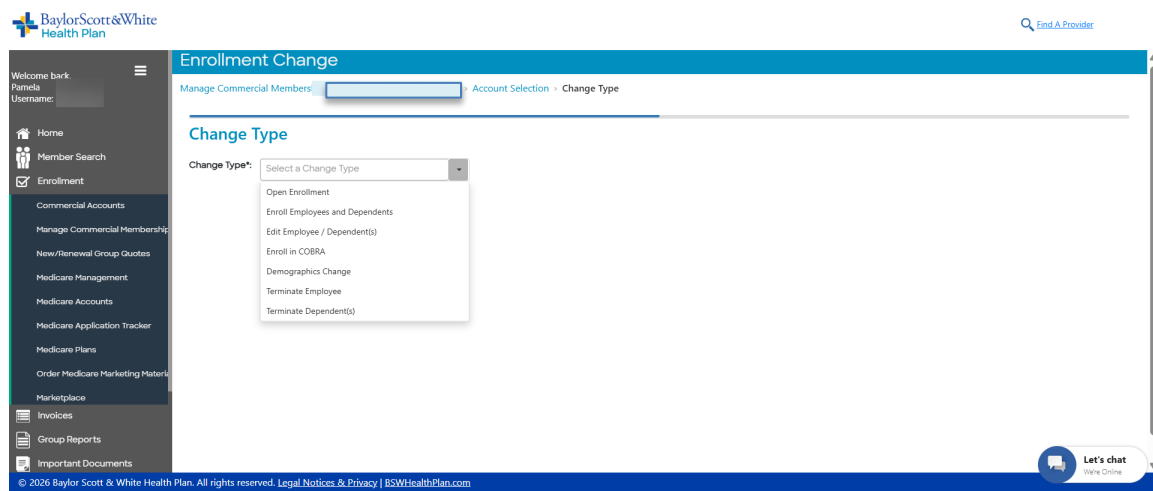
Is to do changes to current membership, add new membership such as adding a dependent to current membership, adding existing employees for the first time, adding dental plan, or just making general updates to employees' coverage for the new plan year.

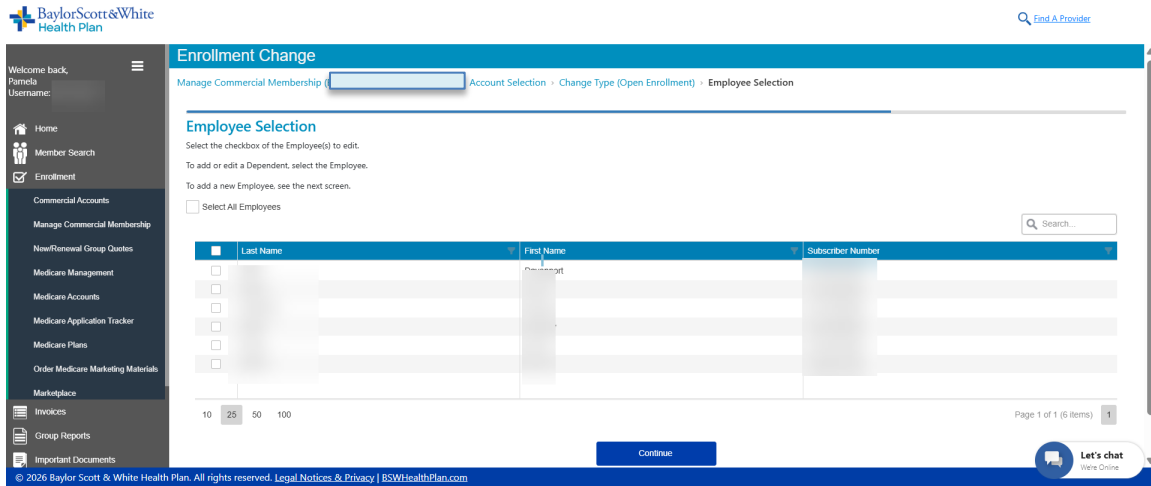
When you click Open Enrollment, you will be given two choices one is to use the Guided Membership Changes or Upload Members from a File.

Step 1: Click Guided Membership Changes

Step 2: View the Change Summary

Step 3: Click to continue to add a New Employee or click on any member in the summary list and click on the grey triangle to open the employees and any dependents currently being covered.





Welcome back, Pamela
Username: P

Home
Member Search
Enrollment

Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
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Invoices
Group Reports
Important Documents

Find A Provider

Enrollment Change
Manage Commercial Membership [Account Selection] > Change Type (Open Enrollment) > Employee Selection

Employee Selection
Select the checkbox of the Employee(s) to edit.
To add or edit a Dependent, select the Employee.
To add a new Employee, see the next screen.
☐ Select All Employees

Search...

	Last Name	First Name	Subscriber Number
☐			
☐			
☐			
☐			
☐			

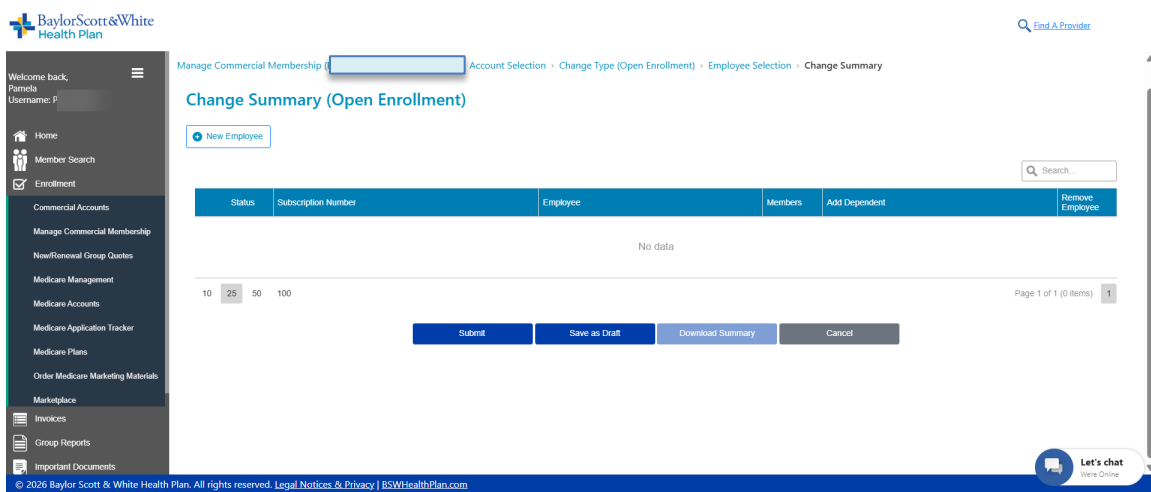
10 25 50 100

Page 1 of 1 (0 items) 1

Continue

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Welcome back, Pamela
Username: P

Home
Member Search
Enrollment

Commercial Accounts
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Find A Provider

Change Summary (Open Enrollment)
New Employee

Search...

Status	Subscription Number	Employee	Members	Add Dependent	Remove Employee
No data					

10 25 50 100

Page 1 of 1 (0 items) 1

Submit Save as Draft Download Summary Cancel

Let's chat
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Enrolling employees and dependents

When you click Enroll Employees and Dependents, you will be given two choices one is to use the Guided Membership Changes or Upload Members from a File.

Step 1: Click Start a Change

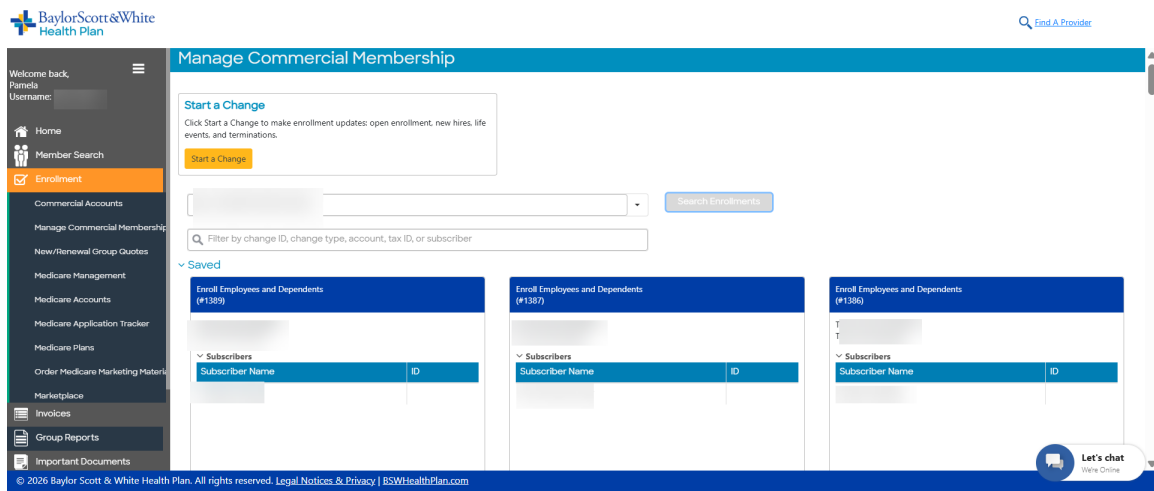
Step 2: Click Guided Membership Changes

Step 3: Click to add a New Employee or click on any member in the summary list and click on the grey triangle to open the employees and Click on Add Dependent on the right.

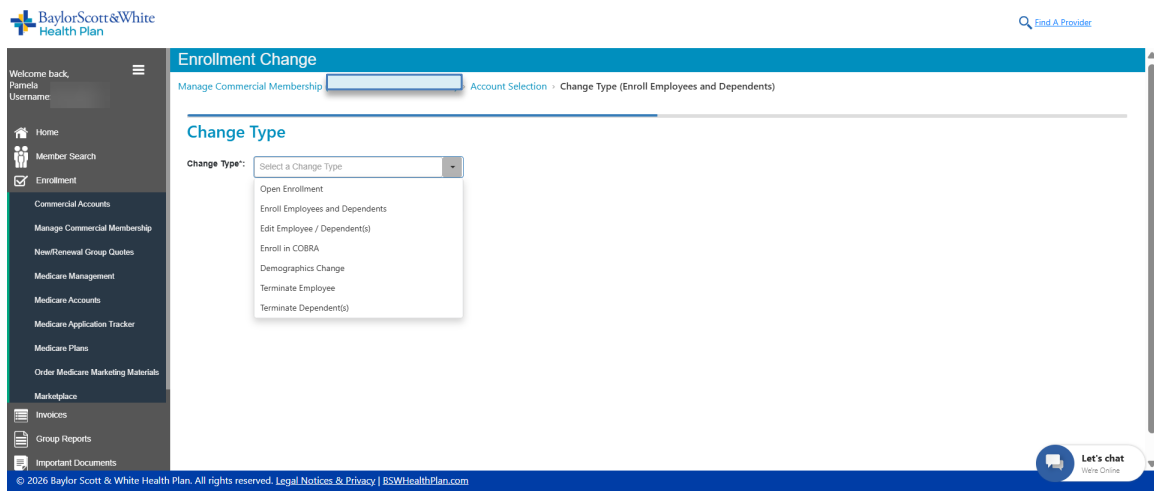
Step 4: Walk through the information and then Save the different sections in case you need to need to come back later or Save and Close to be taken to the review step and submit your request.

Step 5: Once everything is reviewed, click Submit. A message will display letting you know that the request has been submitted.

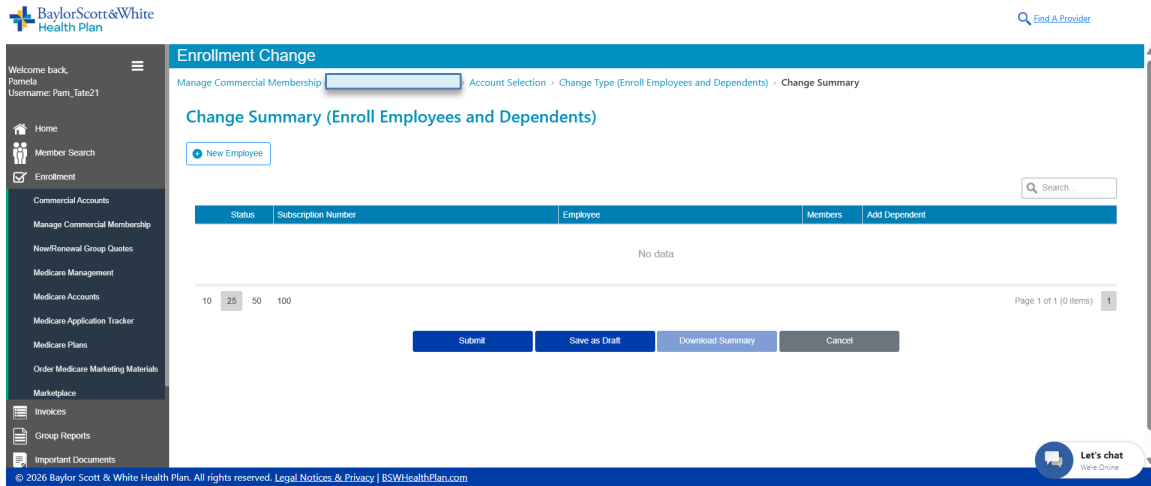
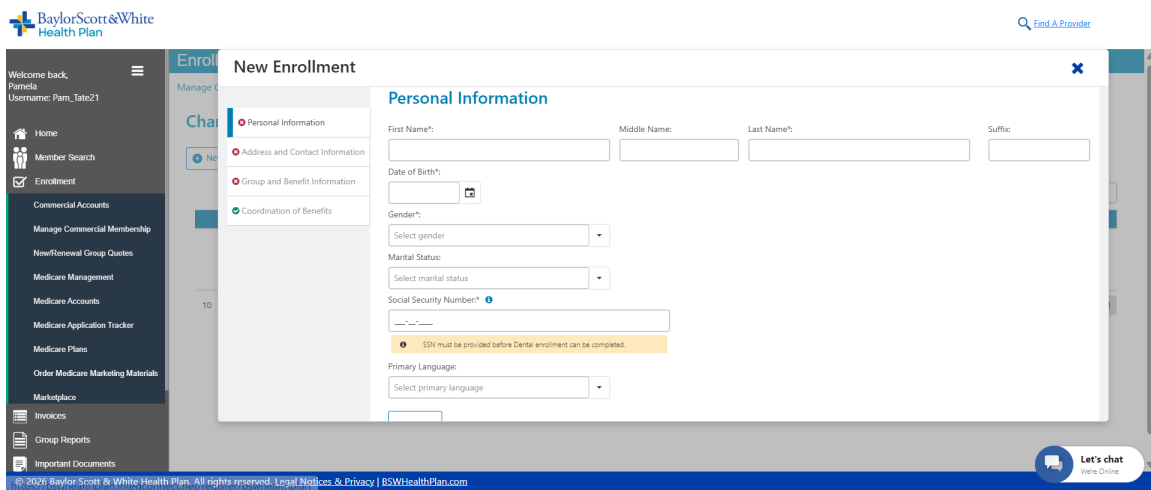
Step 6: Head back to the dashboard to see all transactions that have been submitted.



The screenshot shows the 'Manage Commercial Membership' dashboard. On the left is a navigation menu with options like Home, Member Search, Enrollment (selected), Commercial Accounts, Manage Commercial Membership, New/Renewal Group Quotes, Medicare Management, Medicare Accounts, Medicare Application Tracker, Medicare Plans, Order Medicare Marketing Materials, Marketplace, Invoices, Group Reports, and Important Documents. The main content area has a header 'Manage Commercial Membership' and a 'Start a Change' button. Below this is a search bar and a 'Filter by change ID, change type, account, tax ID, or subscriber' input. Three 'Saved' sections are visible, each titled 'Enroll Employees and Dependents' with a unique ID (#1389, #1387, #1386). Each section contains a table with columns for 'Subscriber Name' and 'ID'. A 'Let's chat' button is in the bottom right corner.



The screenshot shows the 'Enrollment Change' screen. The navigation menu is the same as in the previous screenshot. The main content area has a header 'Enrollment Change' and a breadcrumb trail: 'Manage Commercial Membership' > 'Account Selection' > 'Change Type (Enroll Employees and Dependents)'. Below this is a 'Change Type' section with a dropdown menu. The dropdown is open, showing options: 'Open Enrollment', 'Enroll Employees and Dependents', 'Edit Employee / Dependent(s)', 'Enroll in COBRA', 'Demographics Change', 'Terminate Employee', and 'Terminate Dependent(s)'. A 'Let's chat' button is in the bottom right corner.

Edit employee(s)/dependents

For Editing Employees, you will pick Edit Employee(s)/Dependent(s) change type. This selection takes you to the Employee Selection page, so you can see the active membership to edit.

Step 1: Click Edit Employee(s)/Dependents

Step 2: Click the Employee to Edit

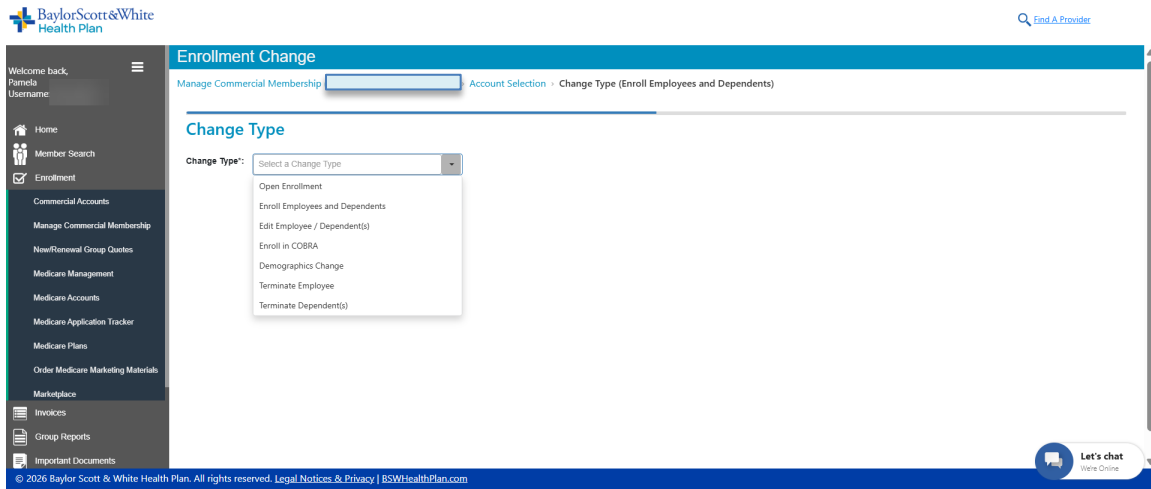
Step 3: Click Continue

Step 4: View Employee to Edit

Step 5: Expand the list, then select the highlighted employee's name to edit their information. To view dependents, expand the employee's record and select the dependent you want to review.

Step 6: Walk through the questions and click next to proceed then Save or Save and Close.

Step 7: Once Save and Close it will take you to the screen to review your updates and click Submit.



Enrollment Change

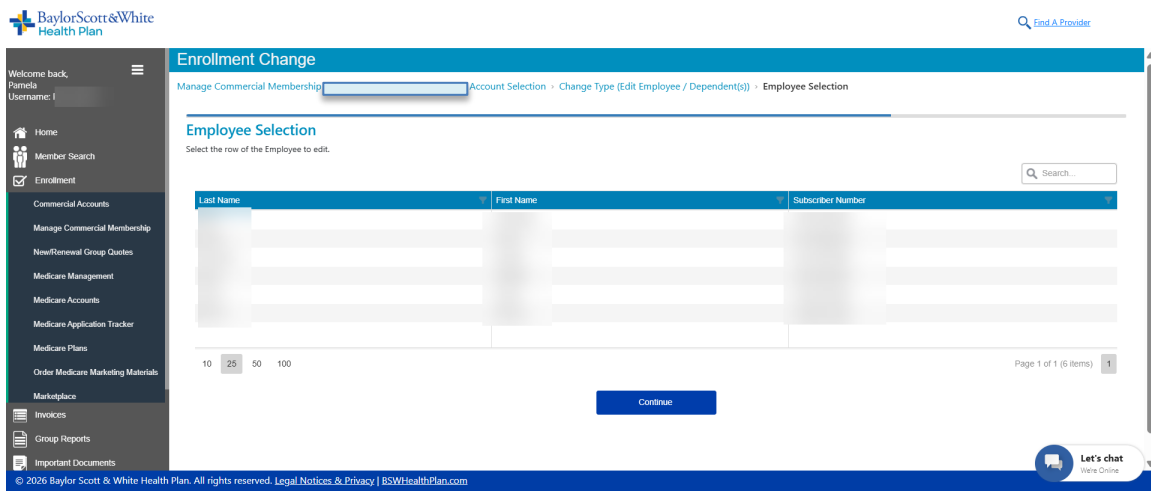
Manage Commercial Membership > Account Selection > Change Type (Enroll Employees and Dependents)

Change Type

Change Type:

- Open Enrollment
- Enroll Employees and Dependents
- Edit Employee / Dependent(s)
- Enroll in COBRA
- Demographics Change
- Terminate Employee
- Terminate Dependent(s)

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Enrollment Change

Manage Commercial Membership > Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection

Employee Selection

Select the row of the Employee to edit.

Last Name	First Name	Subscriber Number

10 25 50 100

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[Continue](#)

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Enrollment Change

Manage Commercial Membership [Search] Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection > Change Summary

Change Summary (Edit Employee / Dependent(s))

Search...

Status	Subscription Number	Employee	Members	Add Dependent
⊕			2	Add Dependent

Status	Name	Relationship	Medical	Dental	Life	Remove
⊕		Self	GPG25028_01911	MLDENV11_01911	MLLIF502_01911	
⊕		Child	GPG25028_01911	None	None	Remove

10 25 50 100 Page 1 of 1 (1 items) 1

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Enrolling in Cobra

For Enrolling in Cobra, you will pick change type, Enroll in Cobra. If you are a self-administered group for Cobra, you will be able to continue through the Guided Membership Change, but if you are enrolled in the BSWHealth Plan Cobra Administrator you will be taken to Health Equity where you will need to login and continue the State Continuation or Cobra enrollment. This selection takes you to the Employee Selection page, so you can see the active membership to edit and enroll in Cobra.

Note: Make sure to terminate the employee before you enroll them into Cobra benefits whether the group enrolls Cobra through HealthEquity WageWorks or through self-administrator.

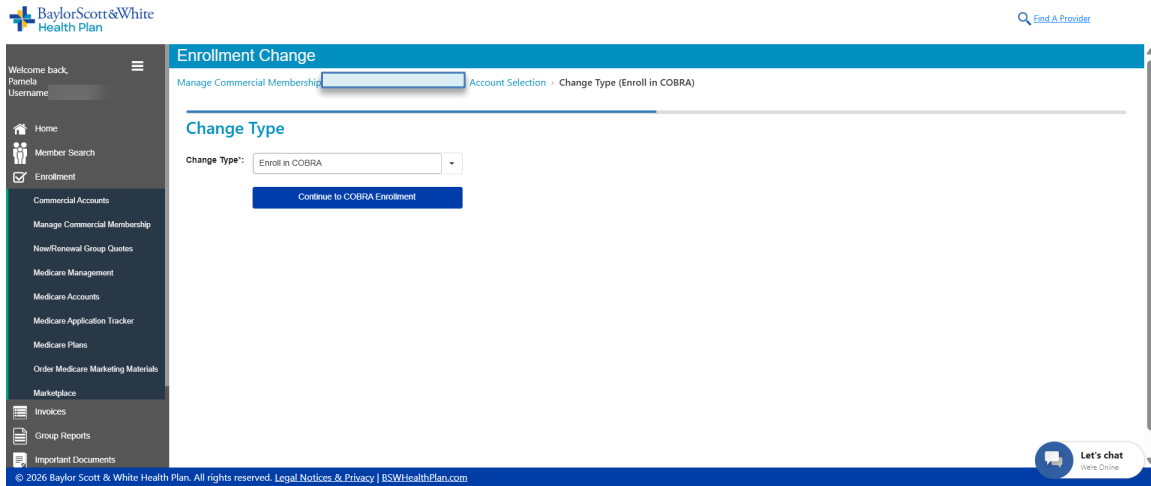
For BSW Health Plan Cobra administered groups

Step 1: Click Manage Membership

Step 2: Click Change type Enroll in Cobra

Step 3: Continue to Cobra Enrollment

Step 4: Continue to Login to HealthEquity WageWorks to complete the Cobra Enrollment



Enrollment Change

Manage Commercial Membership [Account Selection] Change Type (Enroll in COBRA)

Change Type

Change Type: Enroll in COBRA

Continue to COBRA Enrollment

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HealthEquity[®] WageWorks

Username

Password

☐ I comply with HIPAA Privacy & Security

Login



For self-administered Cobra groups

Step 1: Click Manage Membership

Step 2: Click Change type Enroll in Cobra

Step 3: Click Continue with Guided Membership Change

Step 4: Click the Employee to Edit

Step 5: Click Continue

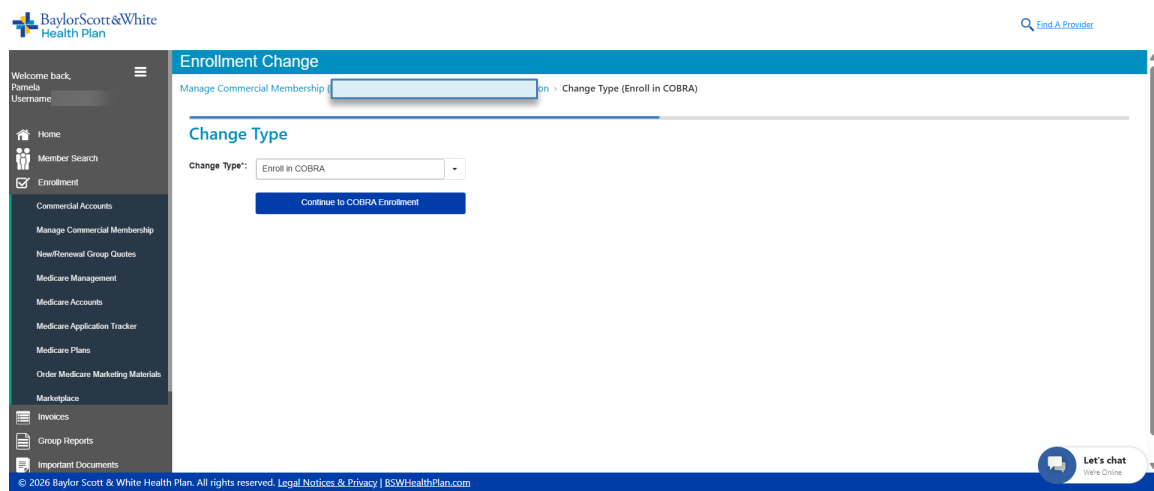
Step 6: View Employee Name and the list of dependents associated with the employee and click the checkbox of employee or dependents to enroll into Cobra. Note you must pick all that this applies.

Step 7: Click on each individual to enroll and walk through the steps for each employee and dependent.

Step 8: Confirm the dependent name on the Change Summary page (Edit Dependent)

Step 9: Walk through the questions and click next to proceed then Save or Save and Close.

Step 10: Once Save and Close it will take you to the screen to review your updates and click



Enrollment Change

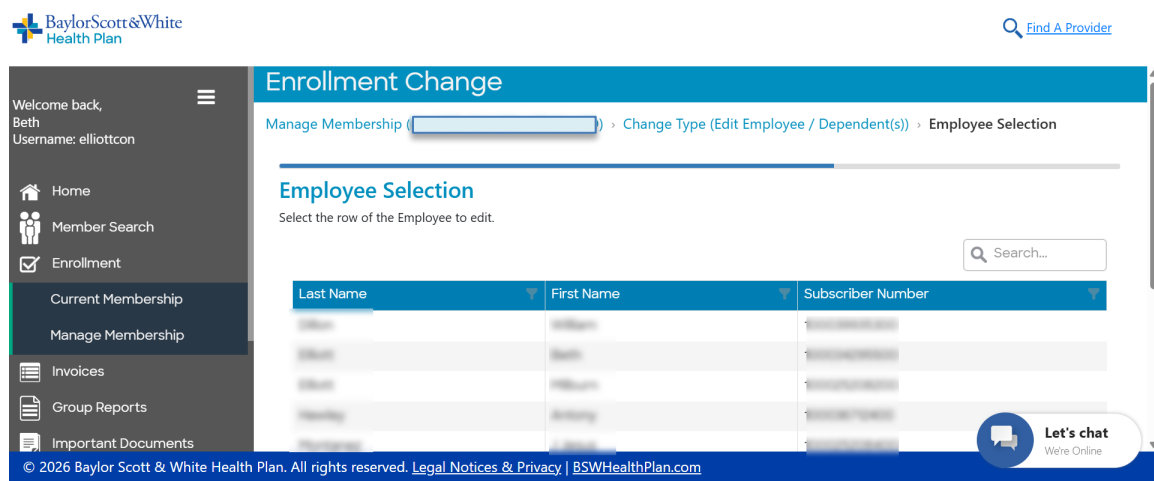
Manage Commercial Membership [] Change Type (Enroll in COBRA)

Change Type

Change Type: Enroll in COBRA

Continue to COBRA Enrollment

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Enrollment Change

Manage Membership [] Change Type (Edit Employee / Dependent(s)) Employee Selection

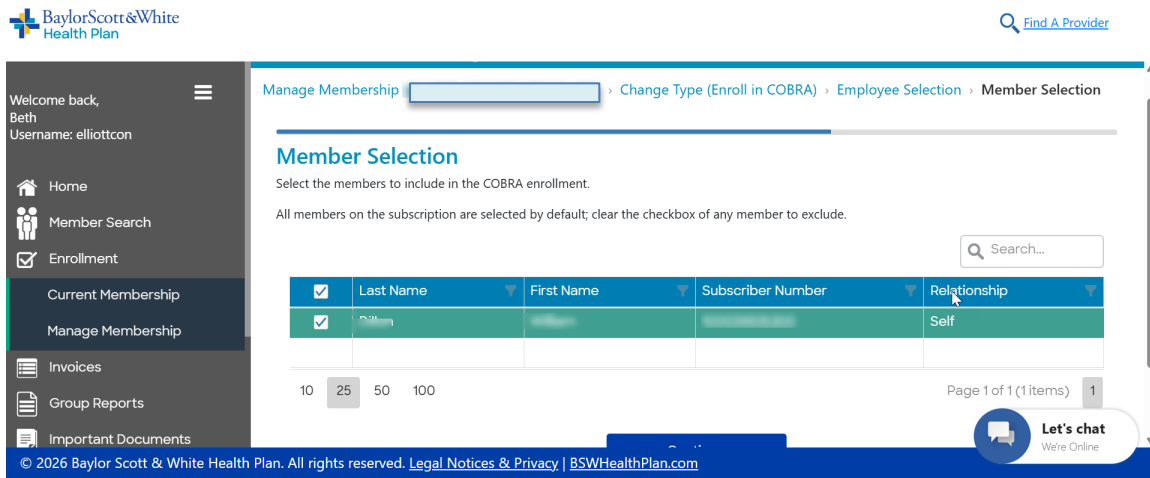
Employee Selection

Select the row of the Employee to edit.

Search...

Last Name	First Name	Subscriber Number
Elliot	Beth	[]
Elliot	Beth	[]
Elliot	Beth	[]
Elliot	Beth	[]
Elliot	Beth	[]
Elliot	Beth	[]

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Welcome back, Beth
Username: elliottcon

Home
Member Search
Enrollment
Current Membership
Manage Membership
Invoices
Group Reports
Important Documents

Manage Membership > Change Type (Enroll in COBRA) > Employee Selection > Member Selection

Member Selection

Select the members to include in the COBRA enrollment.

All members on the subscription are selected by default; clear the checkbox of any member to exclude.

Search...

☒	Last Name	First Name	Subscriber Number	Relationship
☒	Smith	John	123456789	Self

10 25 50 100

Page 1 of 1 (1 items)

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Demographics change

For Demographic Changes, you will pick change type, Demographic Change. This selection takes you to the Employee Selection page, so you can see the active membership to edit. You can change personal information, address and contact information, and coordination of benefits.

Step 1: Click the Employee to Edit

Step 2: Click Continue

Step 3: View Employee Name and if there are any dependents associated to the employee, they will be listed and pick the employee or dependents to view

Step 4: Click the name to edit.

Step 5: Confirm the employee or dependent name on the Change Summary page (Demographic Change)

Step 6: Walk through the questions and click next to proceed then Save or Save and Close.

Step 7: Once you Save and Close it will take you to the screen to review your updates and click

Logo

Baylor Scott & White

Health Plan

Find A Provider

Welcome back,
Pamela
Username:

Home

Member Search

Enrollment

Commercial Accounts

Manage Commercial Membership

New/Renewal Group Quotes

Medicare Management

Medicare Accounts

Medicare Application Tracker

Medicare Plans

Order Medicare Marketing Materials

Marketplace

Invoices

Group Reports

Important Documents

Enrollment Change

Manage Commercial Membership (BURNET COUNTY RECYCLING) > Account Selection > Change Type (Demographics Change)

Change Type

Change Type:

Select a Change Type

Open Enrollment

Enroll Employees and Dependents

Edit Employee / Dependent(s)

Enroll in COBRA

Demographics Change

Terminate Employee

Terminate Dependent(s)

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Version 1.0 | Effective October 1, 2026

23

Enrollment Change

Manage Commercial Membership [Redacted] > Account Selection > Change Type (Demographics Change) > Employee Selection

Employee Selection

Select the row of the Employee to edit.

Search...

Last Name	First Name	Subscriber Number
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

10 25 50 100

Page 1 of 1 (5 Items) 1

Continue

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Enrollment Change

Manage Commercial Membership [Redacted] > Account Selection > Change Type (Demographics Change) > Employee Selection > Change Summary

Change Summary (Demographics Change)

Search...

Status	Subscription Number	Employee	Members
✓	[Redacted]	[Redacted]	2

Status	Name	Relationship	Medical	Dental	Life	Remove
✓	[Redacted]	Self	GPQ25028_01911	MLDENV11_01911	MLLIF502_01911	
✓	[Redacted]	Child	GPQ25028_01911	None	None	

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Enrollment Change

Manage Membership [Redacted] > Change Type (Demographics Change) > Employee Selection

Employee Selection

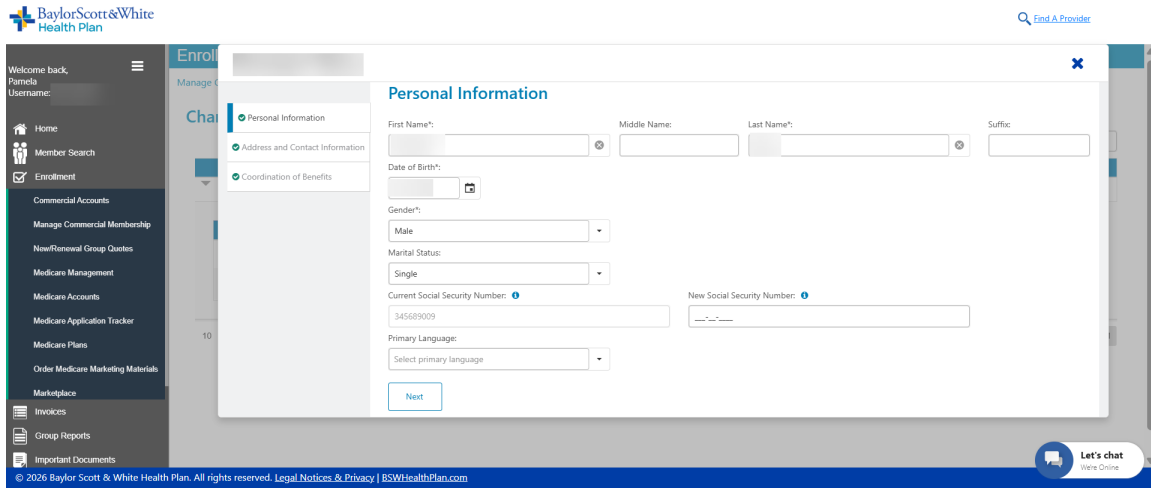
Select the row of the Employee to edit.

Search...

Last Name	First Name	Subscriber Number
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

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The screenshot shows the 'Personal Information' form within the Baylor Scott & White Health Plan enrollment portal. The form is titled 'Personal Information' and includes fields for First Name, Middle Name, Last Name, and Suffix. It also has fields for Date of Birth, Gender (Male), Marital Status (Single), Current Social Security Number (345689009), and New Social Security Number. A Primary Language dropdown menu is set to 'Select primary language'. A 'Next' button is at the bottom. The left sidebar shows navigation options like Home, Member Search, Enrollment, Commercial Accounts, and Invoices. The footer includes copyright information for 2026 Baylor Scott & White Health Plan.

Terminate employee(s)

For termination of employee(s), you will pick change type, Terminate Employee(s). This selection takes you to the Employee Selection page, so you can see the active membership to edit. Groups that have ancillary plans are able to terminate the employee benefits only or terminate employment.

Note: that if you terminate employment, it terms for both the employee and any dependents. If you terminate benefits and you terminate the employee, it will also terminate for the dependents.

Step 1: Click Start a change

Step 2: Click Terminate Employee change type

Step 3: Click Continue

Step 4: Click the employee's name

Step 5: Click continue

Step 6: Confirm the employee or dependent name on the Change Summary page (Terminate benefits or terminate employment)

Enrollment Change

Manage Commercial Membership [Account Selection] > Change Type (Terminate Employee)

Change Type

Change Type: Terminate Employee

[Continue with Guided Membership Change](#)

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Enrollment Change

Manage Commercial Membership [Account Selection] > Change Type (Terminate Employee) > Employee Selection

Employee Selection

Select an employee.

Last Name	First Name	Subscriber Number
Barry	Davenport	100125091000

Page 1 of 1 (5 items)

[Continue](#)

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Enrollment Change

Manage Commercial Membership [Account Selection] > Change Type (Terminate Employee) > Employee Selection > Change Summary

Change Summary (Terminate Employee)

Status	Subscription Number	Employee	Members
⊖			2

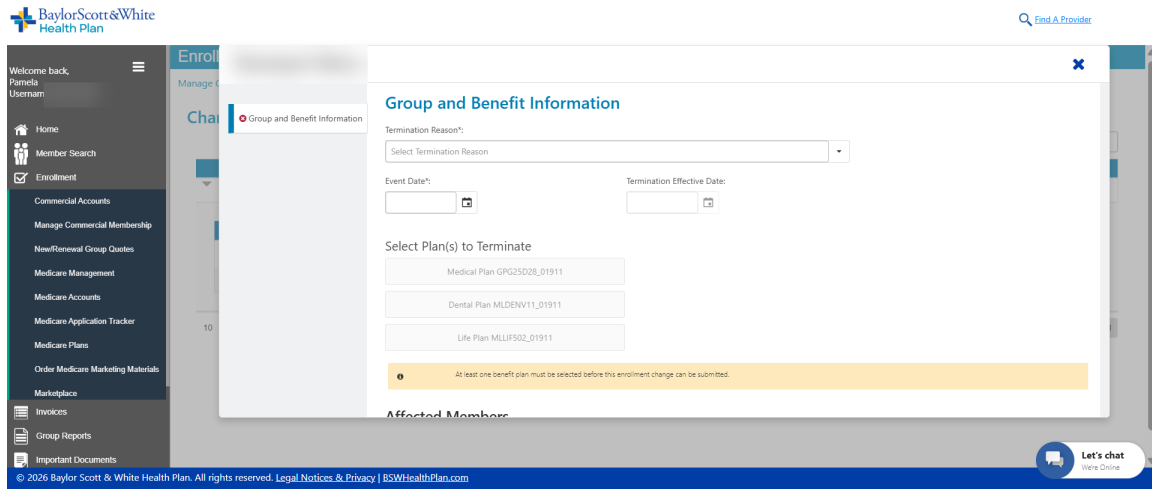
Status	Name	Relationship	Medical	Dental	Life	Termination Event
⊖		Self	GP25028_01911	MLDENV11_01911	MLLIF502_01911	
⊖		Child	GP25028_01911	None	None	

Page 1 of 1 (1 items)

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Step 7: Walk through the questions on the Group and Benefit Information page and click next to proceed then Save or Save and Close.



Step 8: Save and Close it will take you to the screen to review your updates and click Submit

Terminate dependent(s)

For termination of dependent(s), you will pick change type, Terminate Dependent(s). This selection takes you to the Employee Selection page, so you can see the active membership to edit. Groups that have ancillary plans can terminate the employee benefits only or terminate employment.

Note: that if you terminate employment, its terms for both the employee and any dependents. If you terminate benefits and you terminate the employee, it will also terminate for the dependents.

Step 1: Click the Employee(s) name to terminate dependents for

Step 2: Click Continue

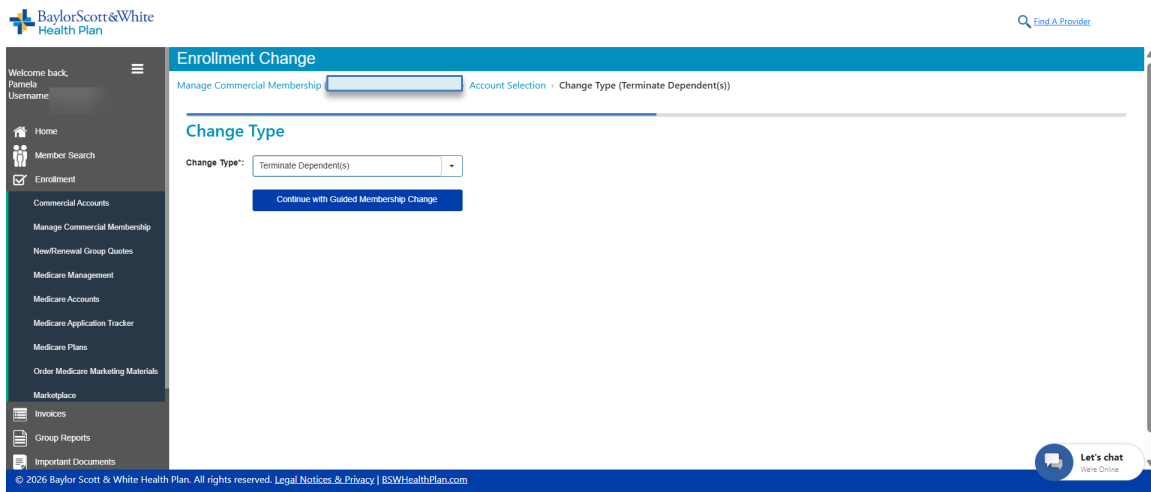
Step 3: View the dependent names associated with the employee. Dependents will be listed individually and may be selected one at a time or all at once.

Step 4: Click the name or names to terminate

Step 5: Confirm the dependent name on the Change Summary page (Terminate benefits)

Step 6: Walk through the questions and select the benefits to terminate for each dependent and click next to proceed then Save or Save and Close.

Step 7: Save and Close it will take you to the screen to review your updates and click submit



Enrollment Change

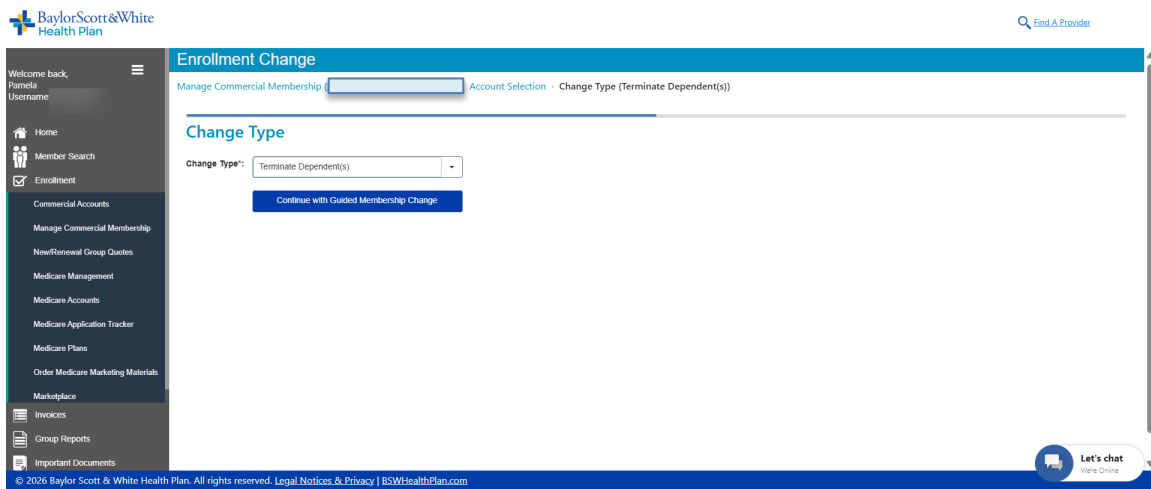
Manage Commercial Membership Account Selection > Change Type (Terminate Dependent(s))

Change Type

Change Type:

[Continue with Guided Membership Change](#)

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Enrollment Change

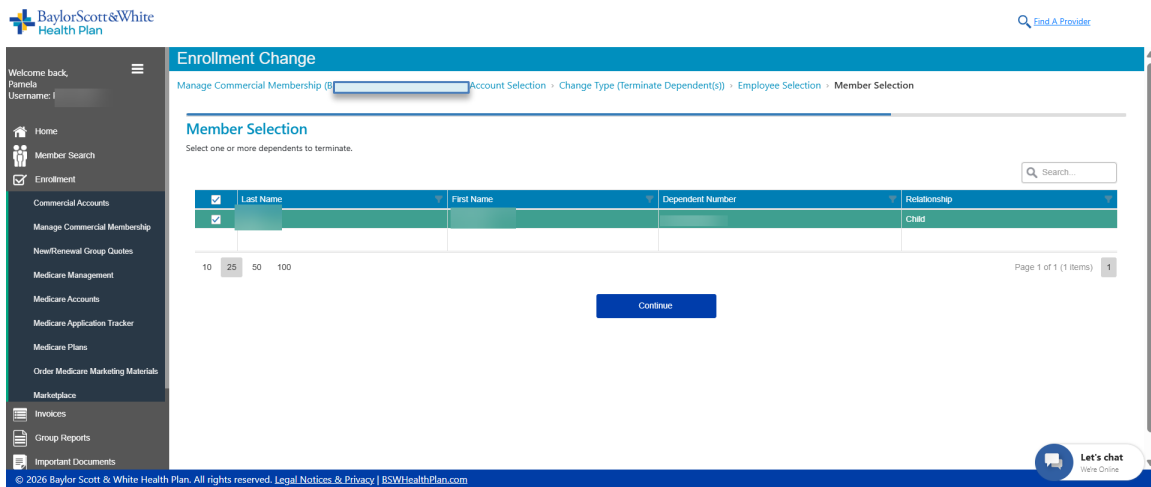
Manage Commercial Membership Account Selection > Change Type (Terminate Dependent(s))

Change Type

Change Type:

[Continue with Guided Membership Change](#)

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Enrollment Change

Manage Commercial Membership Account Selection > Change Type (Terminate Dependent(s)) > Employee Selection > Member Selection

Member Selection

Select one or more dependents to terminate.

☒	Last Name	First Name	Dependent Number	Relationship
☒				Child

10 25 50 100

[Continue](#)

Page 1 of 1 (1 items) 1

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Enrollment Change

Manage Commercial Membership () > Account Selection > Change Type (Terminate Dependent(s)) > Employee Selection > Member Selection > **Change Summary**

Change Summary (Terminate Dependent(s))

Search...

Status	Subscription Number	Employee	Members
⊖			1

Status	Name	Relationship	Medical	Termination Event
⊖		Child		

10 25 50 100 Page 1 of 1 (1 items) 1

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Enrollment Change

Manage Commercial Membership () > Account Selection > Change Type (Terminate Dependent(s)) > Employee Selection > **Member Selection**

Member Selection

Select one or more dependents to terminate.

Search...

☐	Last Name	First Name	Dependent Number	Relationship
☐				Child

10 25 50 100 Page 1 of 1 (1 items) 1

Continue

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Enrollment Change

Manage Commercial Membership () > Account Selection > Change Type (Terminate Dependent(s)) > Employee Selection > Member Selection > **Change Summary**

Change Summary (Terminate Dependent(s))

Search...

Status	Subscription Number	Employee	Members
⊖			1

Status	Name	Relationship	Medical	Termination Event
⊖		Child		

10 25 50 100 Page 1 of 1 (1 items) 1

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Welcome back, Pamela
Username:

Home
Member Search
Enrollment

Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Materials
Marketplace
Invoices
Group Reports
Important Documents

Enrollment
Manage Enrollment
Group and Benefit Information

Group and Benefit Information

Dependent of Employee:

Relationship to Employee:

Termination Reason*:

Event Date*: 

Termination Effective Date: 

Select Plan(s) to Terminate

At least one benefit plan must be selected before this enrollment change can be submitted.

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<https://portal-hr19-east2-swhpcommabswhive.com/Agents/invoices> [Privacy](#) | [BSWHealthPlan.com](#)

Medical Dental and Life benefits

For adding Medical, Dental and Life Benefits, please click on Enrollment in the Navigation menu, Manage Membership, Start a Change and Continue with Guided Membership Change. If the change is for a Qualifying Event, then an existing member change benefit plans. If there is no Qualifying Event, then the other change types would be adding a new employee or Open Enrollment Follow the steps to add these benefits to the membership.

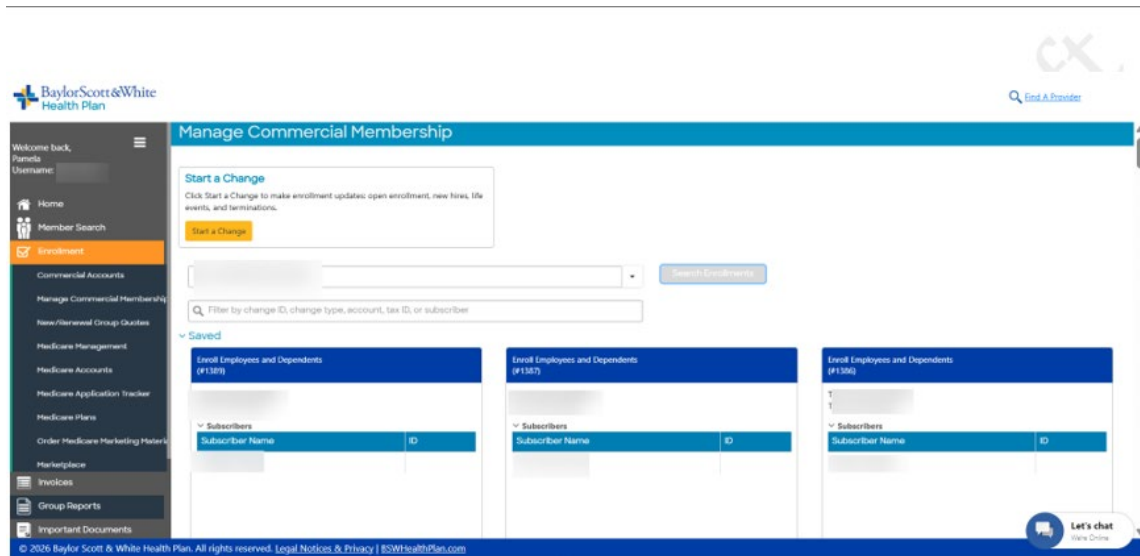
Step 1: Click the Start a Change

Step 2: Select the change type

Step 3: Click Continue with Guided Membership Change

Step 4: Walk through the questions and click next to proceed then Save or Save and Close.

Step 5: Once Save and Close it will take you to the screen to review your updates and click




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Welcome back, Pamela
Username: Pam_Tate21

Home
Member Search
Enrollment

Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Materials
Marketplace
Invoices
Group Reports
Important Documents

Enrollment Change

Manage Commercial Membership (BURNET COUNTY RECYCLING) > Account Selection > Change Type

Change Type

Change Type*:

- Enroll Employees and Dependents
- Edit Employee / Dependent(s)
- Enroll in COBRA
- Demographics Change
- Terminate Employee
- Terminate Dependent(s)

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Welcome back, Pamela
Username: Pam_Tate21

Home
Member Search
Enrollment

Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Materials
Marketplace
Invoices
Group Reports
Important Documents

Enrollment Change

Manage Commercial Membership (BURNET COUNTY RECYCLING) > Account Selection > Change Type (Enroll Employees and Dependents) > Change Summary

Change Summary (Enroll Employees and Dependents)

☒ New Employee

Status	Subscription Number	Employee	Members	Add Dependent
No data				

10 25 50 100

Page 1 of 1 (0 items)

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Welcome back, Tino
Username:

Home
Member Search
Enrollment

Current Membership
Manage Membership
Invoices
Group Reports
Important Documents

New Enrollment

Personal Information

☒ Personal Information
☒ Address and Contact Information
☒ Group and Benefit Information
☒ Coordination of Benefits

First Name*: Middle Name: Last Name*: Suffix:

Date of Birth*: 

Gender*:

Marital Status:

Social Security Number*:

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Enrollment Change

Manage Commercial Membership (BURNET COUNTY RECYCLING) > Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection

Employee Selection

Select the row of the Employee to edit.

Search...

Last Name	First Name	Subscriber Number

10 25 50 100

Page 1 of 1 (6 Items) 1

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Enrollment Change

Manage Commercial Membership (BURNET COUNTY RECYCLING) > Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection > Change Summary

Change Summary (Edit Employee / Dependent(s))

Search...

Status	Subscription Number	Employee	Members	Add Dependent
⊖			2	Add Dependent

Status	Name	Relationship	Medical	Dental	Life	Remove
⊖		Self	GPG25028_01911	MLDENV11_01911	MLLIF502_01911	
⊖		Child	GPG25028_01911	None	None	Add

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Enrollment Change

Manage Commercial Membership (BURNET COUNTY RECYCLING) > Account Selection > Change Type (Open Enrollment) > Employee Selection

Employee Selection

Select the checkbox of the Employee(s) to edit.
To add or edit a Dependent, select the Employee.
To add a new Employee, see the next screen.

☐ Select All Employees

Search...

☐	Last Name	First Name	Subscriber Number
☐			
☐			
☐			
☐			
☐			

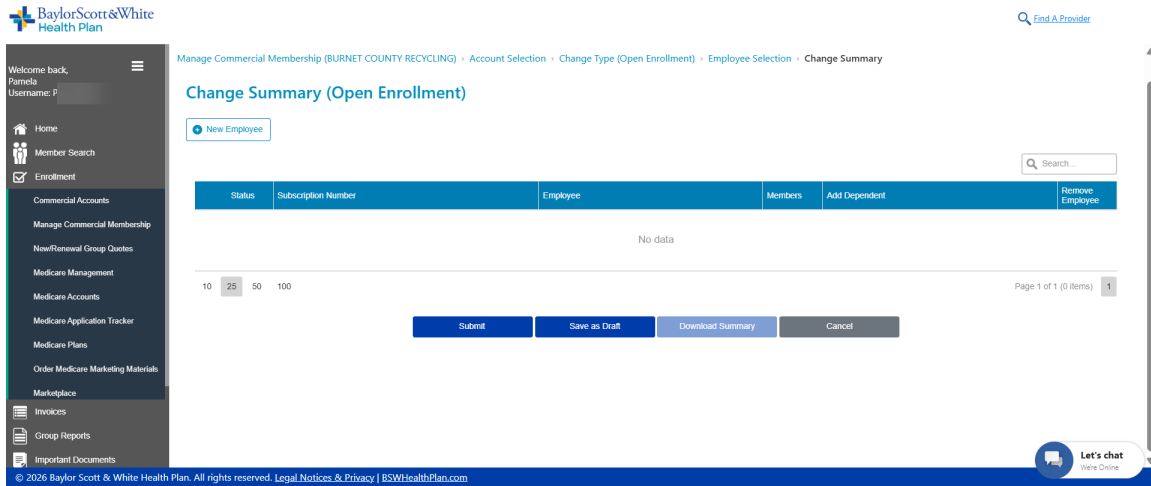
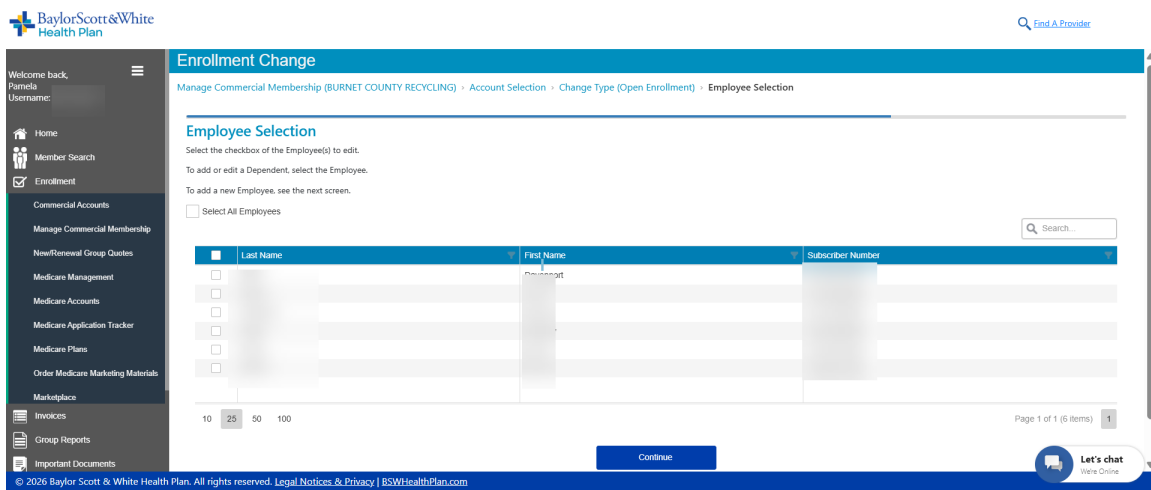
10 25 50 100

Page 1 of 1 (6 Items) 1

Continue

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Coordination of benefits

For Coordination of Benefits, you will pick change type, Enrollment Employee(s) Dependents, or Edit Employee(s) Dependents or Demographics Change. Continue with Guided Membership Changes and follow the screens to add Coordination of Benefit information.

Step 1: Click the Start a Change

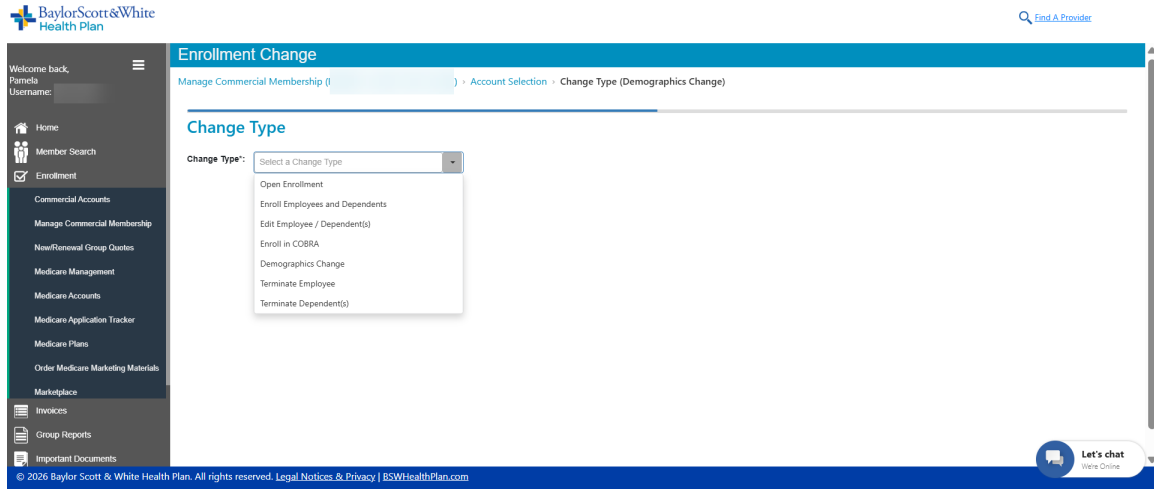
Step 2: Select the change type

- If Edit Employee/Dependents, then you will need to select the employee and continue to the next screens
- Or Change Demographics

Step 3: Click Continue with Guided Membership Change

Step 5: Walk through the questions and click next to proceed then Save or Save and Close.

Step 6: Once Save and Close it will take you to the screen to review your updates and click submit.



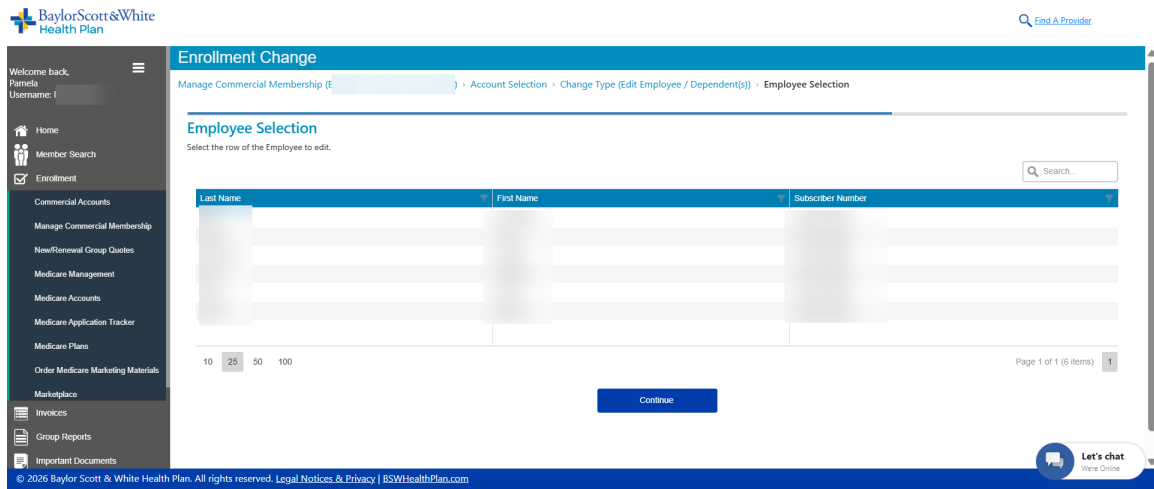
Enrollment Change
Manage Commercial Membership (1) > Account Selection > Change Type (Demographics Change)

Change Type

Change Type:

- Open Enrollment
- Enroll Employees and Dependents
- Edit Employee / Dependent(s)
- Enroll in COBRA
- Demographics Change
- Terminate Employee
- Terminate Dependent(s)

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Enrollment Change
Manage Commercial Membership (1) > Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection

Employee Selection
Select the row of the Employee to edit.

Last Name	First Name	Subscriber Number

10 25 50 100

Page 1 of 1 (5 items) 1

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Enrollment Change

Manage Commercial Membership () > Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection > Change Summary

Change Summary (Edit Employee / Dependent(s))

Status	Subscription Number	Employee	Members	Add Dependent
⊕			2	Add Dependent

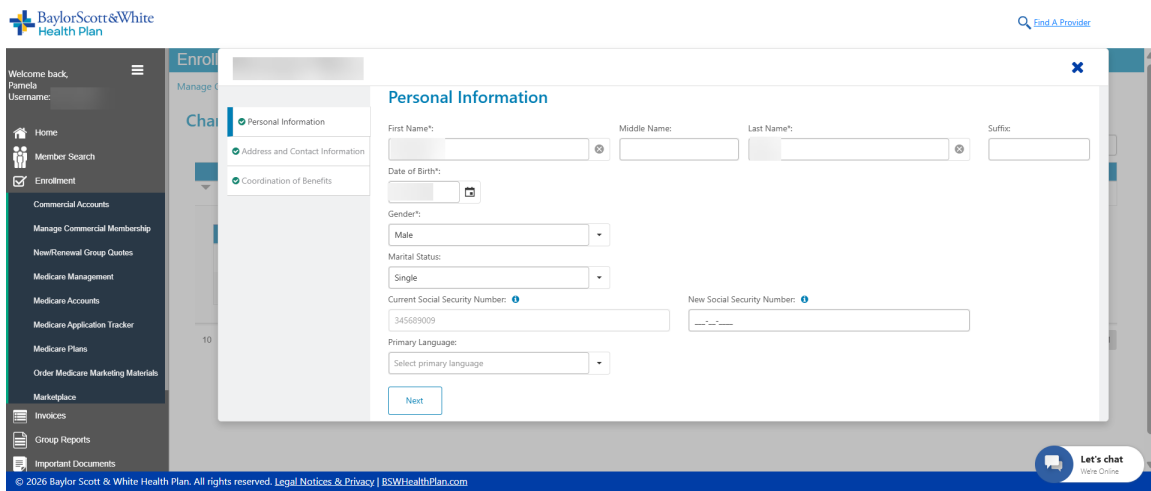
Status	Name	Relationship	Medical	Dental	Life	Remove
⊕		Self	GPQ25028_01911	MLDENV11_01911	MLLIF502_01911	
⊕		Child	GPQ25028_01911	None	None	

10 25 50 100 Page 1 of 1 (1 items)

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Enrollment Change

Manage Commercial Membership () > Account Selection > Change Type (Edit Employee / Dependent(s)) > Employee Selection > Change Summary

Personal Information

First Name*: Middle Name: Last Name*: Suffix:

Date of Birth*:

Gender*:

Marital Status:

Current Social Security Number: New Social Security Number:

Primary Language:

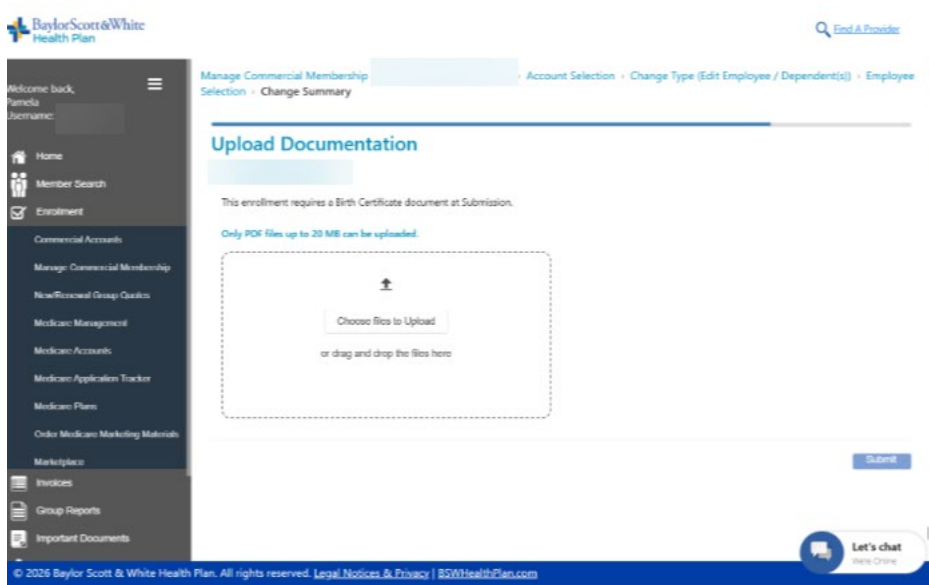
[Next](#)

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Document uploads

For certain change types such as Marriage, Adoption etc... You will have to supply documentation. When prompted, follow the steps and upload the required documentation in PDF format. Supporting up to 25 PDF attachments with a maximum file size of 20 MB each. You will pick change type and follow the steps to enter the information at the end of the transaction. If the change type requires documentation, you will be prompted to load the documentation.



SSN updates

For Social Security Number updates to employee(s) and or dependents, you will pick change type, Terminate Employee(s). This selection takes you to the Employee Selection page so you can see the active membership to edit. Groups that have ancillary plans are able to terminate the employee benefits only or terminate employment.

Note: that if you terminate employment, its terms for both the employee and any dependents. If you terminate benefits and you terminate the employee, it will also terminate for the dependents.

Step 1: Click the Employee(s) to terminate

Step 2: Click Continue

Step 3: View Employee Name on the Right column and if there are any dependents associated to the employee, they will be listed and the employee's name will show in the right column, , and pick the employee or dependents to view

Step 4: Click the name to edit.

Step 5: Confirm the employee or dependent name on the Change Summary page (Terminate benefits or terminate employment)

Step 6: Walk through the questions and click next to proceed then Save or Save and Close.

Step 7: Once Save and Close it will take you to the screen to review your updates and click

Why we collect social security numbers

As a health insurance company, we may request your Social Security Number (SSN) to administer your health coverage, verify eligibility, process claims, and comply with applicable legal and regulatory requirements.

Your SSN may be used to:

- Verify your identity and help protect against fraud and identity theft.
- Confirm eligibility for coverage and benefits.
- Process enrollment, claims, and premium payments.
- Coordinate benefits with other health plans, government programs, or insurers when applicable.
- Report information to government agencies as required by federal and state laws.
- Maintain accurate records and ensure that coverage and claims are associated with the correct individual.

We understand that your SSN is sensitive to personal information. We use administrative, technical, and physical safeguards designed to protect your information from unauthorized access, use, or disclosure. Access to your SSN is limited to authorized personnel and service providers who require it to perform legitimate business functions.

Providing your SSN helps us efficiently administer your coverage and meet our legal obligations. If you have questions about how your information is collected, used, shared, or protected, please review our Privacy Notice or contact our Member Services department.

Your privacy and the security of your personal information are important to us.

Legal Disclaimer: This information is provided for general informational purposes only and is not intended to constitute legal advice.

Effective Date: August 11, 2026

Subaccount changes

For subaccount changes for employee(s), you will pick change type, Edit Employee/Dependent(s). This selection takes you to the Employee Selection page, so you can see the active membership to edit. Select the Employee to change.

Note: that the change will go into effect on the first of the following month.

Step 1: Click Edit Employee(s)/Dependent(s)

Step 2: Click Continue with the Guided Membership Change

Step 3: View Employee Name

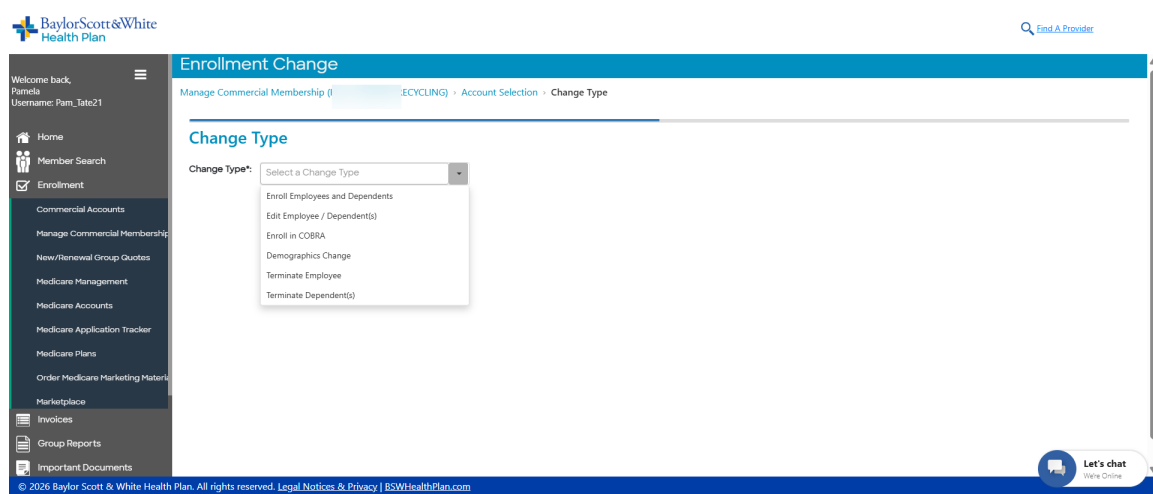
Step 5: Click the name to edit.

Step 6: Confirm the employee or dependent name on the Change Summary page (Terminate benefits or terminate employment)

Step 7: Walk through the questions and click next to proceed then Save or Save and Close.

Step 8: Once Save and Close it will take you to the screen to review your updates and click submit

Step 9: Click on Download Summary to view and save a copy of the transaction you are submitting



 [Find A Provider](#)

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Enrollment status tracking

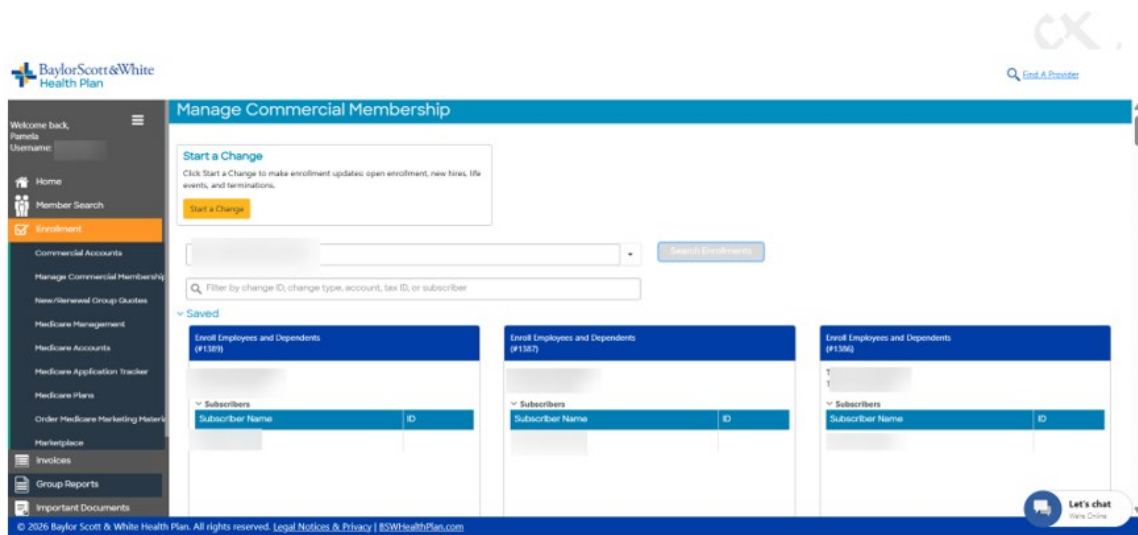
For Enrollment Status Tracking, review the dashboard for Manage Membership. This will let you know where the enrollment transactions are that you have submitted or where the transactions are for other users, and Broker users are in the submission process. You will see Saved transactions that need to be submitted to the system, submitted transactions that have been sent to the system for processing, or processed transactions that have been submitted to the system and waiting on completion. Once the transaction has been completed you will see the membership in your employee membership census under the enrollment current membership section of the portal

Note: you can view all user transactions in the portals, but you will only be able to complete your transactions. You can also download a summary of your transactions when you are at the screen to submit your enrollment transactions.

Step 1: Click Manage Membership to view enrollment transactions

Step 2: Click Current Membership to view completed enrollment transactions

Step 3: View Employee Name on the Right column and if there are any dependents associated to the employee, they will be listed and the employee's name will show in the right column, , and pick the employee or dependents to view



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Medicare Application Tracker

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Important Documents

Welcome back, Pamela

Username: [redacted]

Start a Change

Click Start a Change to make enrollment updates: open enrollment, new hires, life events, and terminations.

Filter by change ID, change type, account, tax ID, or subscriber

Search Enrollments

Open Enrollment (#1137)

Top Account Id: [redacted]

Tax Id: 2 [redacted]

Subscribers

Open Enrollment (#1267)

Top Account Id: [redacted]

Tax Id: [redacted]

Subscribers

Open Enrollment (#1266)

Top Account Id: [redacted]

Tax Id: [redacted]

Subscribers

Let's chat

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Membership Change Summary

Account	[redacted]
Tax ID	[redacted]
Change Type	[redacted]
Membership Change #	903

Name	Relationship	Medical	Dental	Life	Issue ID
[redacted]	Self	GPG26D26_00108	MLDENBA1_00108	MLLIF252_00108	

Census spreadsheet for Open Enrollment submission

For Census Spreadsheets for Open Enrollment submissions, click on the Manage Commercial Membership, and start a change. The change type will need to be Open Enrollment and click on Upload Member from a file. On completion of the exported census, you will be able to drop the updated census either by dragging and dropping into the enrollment file selection or by picking the file from your computer. Once the transaction has been completed, you will see the membership in your change summary for open enrollment. If there are any errors, you will be able to correct and resubmit.

Note: if your spreadsheet has errors such as formatting, wrong dates there will be an error list that will come up with the spreadsheet row number and the error that needs to be corrected.

Resolve Errors:		
Row	Member	Errors
2		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
3		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female. Date of Birth: Date of birth must be a valid date and cannot be in the future.
4		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
5		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
6		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
7		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
8		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
9		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Dependent SSN: Enter a valid Dependent SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
10		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Dependent SSN: Enter a valid Dependent SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
11		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
12		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
13		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
14		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
15		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
16		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
17		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
18		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
19		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
20	Rose Jimenez	Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
21	Taya Copeland	Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.

Step 1: Click Manage Membership

Step 2: Click Start a Change

Step 3: Click on Open Enrollment

Step 4: Click on Upload Members from a file

Step 5: Put in the date for the census spreadsheet in the As of Date field

Step 6: Click on Export Census

Step 7: Save the spreadsheet and click on Enable Editing to make your changes to the current membership or add new Employees or dependents for OE. All New Employees will be subject to the New Hire Rules once uploaded into the enrollment system.

Step 8: Upload the updated spreadsheet into the member upload section and follow any instructions regarding errors, and you can correct the errors until you receive a successful load.

Step 9: Review your membership upload in the Change Summary and once all members display a green check mark, then you will be ready to submit.

Step 10: Click Submit and this spreadsheet submission will be shown in the submitted section on the dashboard

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Welcome back, Pamela
Username: [redacted]

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Manage Commercial Membership
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Medicare Application Tracker
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Start a Change
Click Start a Change to make enrollment updates: open enrollment, new hires, life events, and terminations.
[Start a Change](#)

[Search Enrollments](#)

Filter by change ID, change type, account, tax ID, or subscriber

> Saved
> Submitted
▼ Processed

Open Enrollment (#1137)
Top Account Id: [redacted]
Tax Id: [redacted]

Status	Subscriber Name	ID
✓ Processed	[redacted]	[redacted]

Open Enrollment (#1267)
Top Account Id: [redacted]
Tax Id: [redacted]

Status	Subscriber Name	ID
✓ Processed	[redacted]	[redacted]

Open Enrollment (#1266)
Top Account Id: [redacted]
Tax Id: [redacted]

Status	Subscriber Name	ID
✓ Processed	[redacted]	[redacted]

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Important Documents

Enrollment Change
Manage Commercial Membership [redacted] > Account Selection > Change Type

Change Type
Change Type*:

- Enroll Employees and Dependents
- Edit Employee / Dependents
- Enroll in COBRA
- Demographics Change
- Terminate Employee
- Terminate Dependent(s)

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Welcome back, Pamela
Username: [redacted]

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Enrollment Change
Manage Commercial Membership [redacted] > Account Selection > Change Type (Open Enrollment)

Change Type
Change Type*:

[Continue with Guided Membership Change](#)
[Upload Members from a File](#)

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Welcome back,
Pamela
Username:

- Home
- Member Search
- Enrollment

Commercial Accounts

- Manage Commercial Membership
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- Medicare Management
- Medicare Accounts
- Medicare Application Tracker
- Medicare Plans
- Order Medicare Marketing Materials

Marketplace

- Invoices
- Group Reports
- Important Documents

Enrollment Change

Manage Commercial Membership () > Account Selection > Change Type (Open Enrollment) > Member Upload

Member Upload

Upload member information from a file. Use the actions in the top panel to download a blank template or to export the account's current members. Then fill out the workbook offline and upload it in the panel below.

Step 1: Download Workbook

Export Census

Choose an as-of date and export the account's current members to a workbook for editing.

As of Date:

Export Census

Download Template

Download a blank workbook to add new employees and dependents.

Download Template

Step 2: Upload Members

Enrollment File Selection (Excel .xlsx files only)

Drop file here

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AutoSave Off ScottAndWhite_07852_20260909_Enrollment (2) - Protecte... Saved to this PC

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Kofax PDF

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

	A	B	C	D	E	F	G	H	I	J	K	L
	Subscription ID	Employee SSN	Member ID	Dependent SSN	Emp./Dep. Last Name	Emp./Dep. First Name	Middle Initial	Relationship to Employee	Gender	Date of Birth	Account ID	Benefit Plan ID
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
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16												
17												
18												
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20												
21												
22												

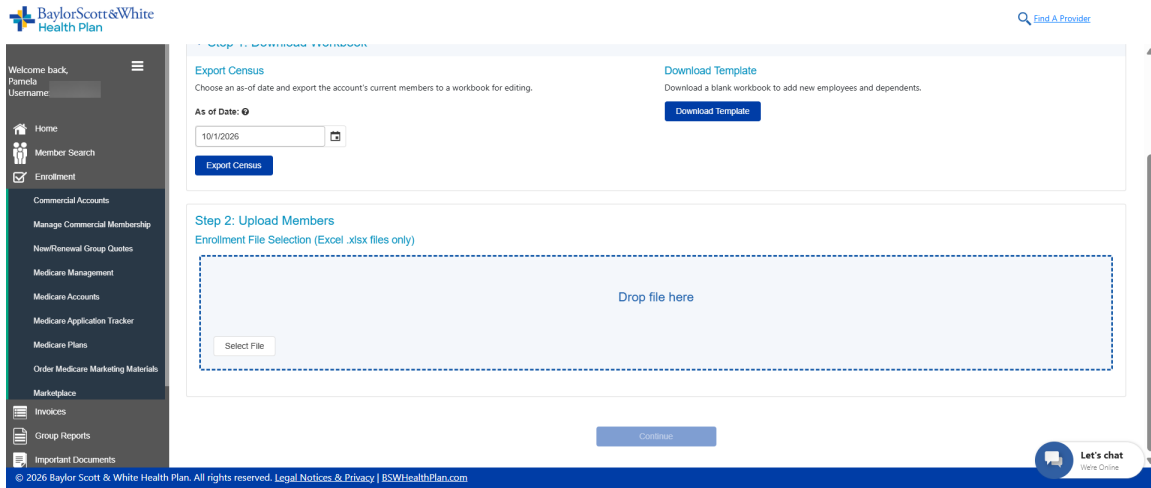
Enrollment Form

Ready

Resolve Errors:

Row	Member	Errors
2		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
3		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female. Date of Birth: Date of birth must be a valid date and cannot be in the future.
4		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
5		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
6		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
7		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
8		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
9		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Dependent SSN: Enter a valid Dependent SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
10		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Dependent SSN: Enter a valid Dependent SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
11		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
12		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
13		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
14		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
15		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
16		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
17		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
18		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
19		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
20	Rose Jimenez	Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
21	Taya Copeland	Employee SSN: Enter a valid Employee SSN in the format 123-45-6789. Gender: Gender must be Male or Female.

5 10 20



Step 1: Export Census

Export Census
Choose an as-of date and export the account's current members to a workbook for editing.

As of Date: 

[Download Template](#)
Download a blank workbook to add new employees and dependents.

[Download Template](#)

[Export Census](#)

Step 2: Upload Members
Enrollment File Selection (Excel .xlsx files only)

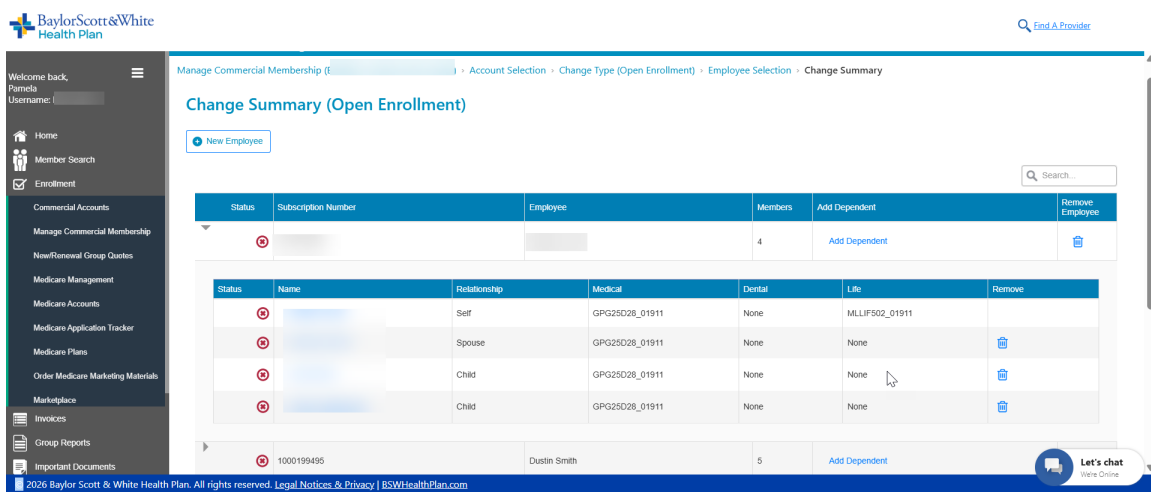
Drop file here

[Select File](#)

[Continue](#)

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Tip: If you have a member that the indicator will not turn green due to missing information you can remove the member by clicking on the trashcan and you can add them back into the system at a later date when you have information.

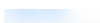
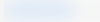
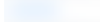
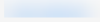


Change Summary (Open Enrollment)

[New Employee](#)

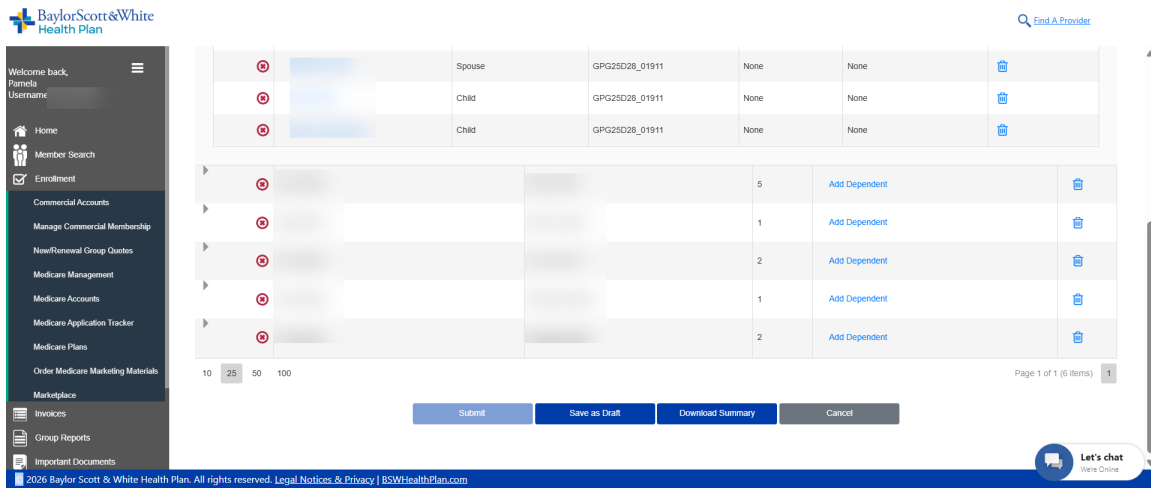
Manage Commercial Membership (1) > Account Selection > Change Type (Open Enrollment) > Employee Selection > Change Summary

Status	Subscription Number	Employee	Members	Add Dependent	Remove Employee
			4	Add Dependent	

Status	Name	Relationship	Medical	Dental	Life	Remove
		Self	GPG25D28_01911	None	MLLIF502_01911	
		Spouse	GPG25D28_01911	None	None	
		Child	GPG25D28_01911	None	None	
		Child	GPG25D28_01911	None	None	

1000199495 Dustin Smith 5 [Add Dependent](#)

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Spouse	GPG25D28_01911	None	None	
Child	GPG25D28_01911	None	None	
Child	GPG25D28_01911	None	None	
		5	Add Dependent	
		1	Add Dependent	
		2	Add Dependent	
		1	Add Dependent	
		2	Add Dependent	

10 25 50 100 Page 1 of 1 (5 Items) 1

Submit Save as Draft Download Summary Cancel

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Census spreadsheet for new group submission

For Census Spreadsheets for Open Enrollment submissions, click on the Manage Membership, and start a change. The change type will need to be Open Enrollment and click on Upload Member from a file. On completion of the exported census, you will be able to drop the updated census either by dragging and dropping into the enrollment file selection or by picking the file from your computer. Once the transaction has been completed, you will see the membership in your change summary for open enrollment. If there are any errors, you will be able to correct and resubmit

Note: if your spreadsheet has errors such as formatting, wrong dates, there will be an error list that will come up with the spreadsheet row number and the error that needs to be corrected.

Step 1: Click Manage Membership

Step 2: Click Start a Change

Step 3: Click on Open Enrollment

Step 4: Click on Upload Members from a file

Step 5: Put in the date for the census spreadsheet in the As of Date field

Step 6: Click on Export Census

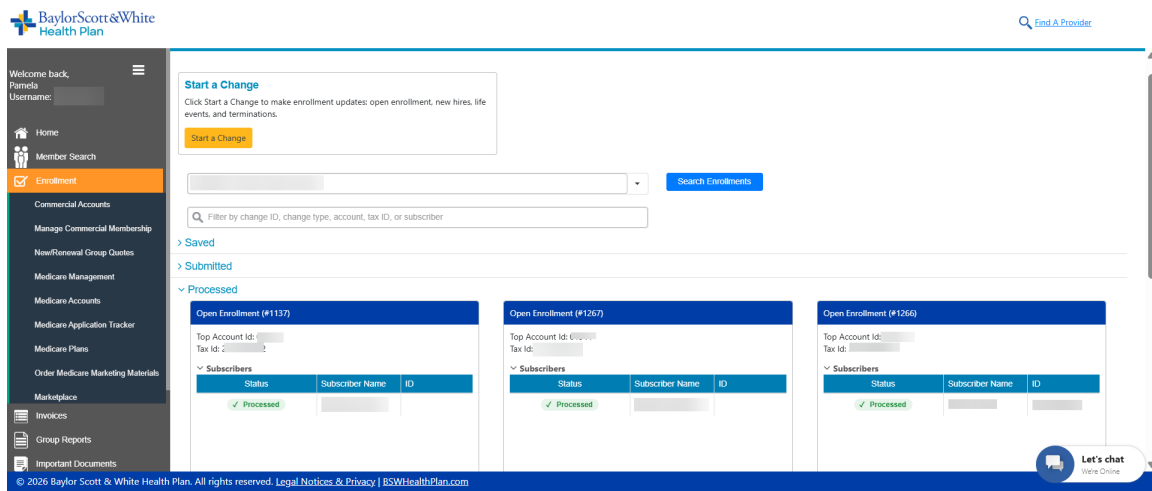
Step 7: Save the spreadsheet and click on Enable Editing to make your changes to the current membership or add new Employees or dependents

for OE. All New Employees will be subject to the New Hire Rules once uploaded into the enrollment system.

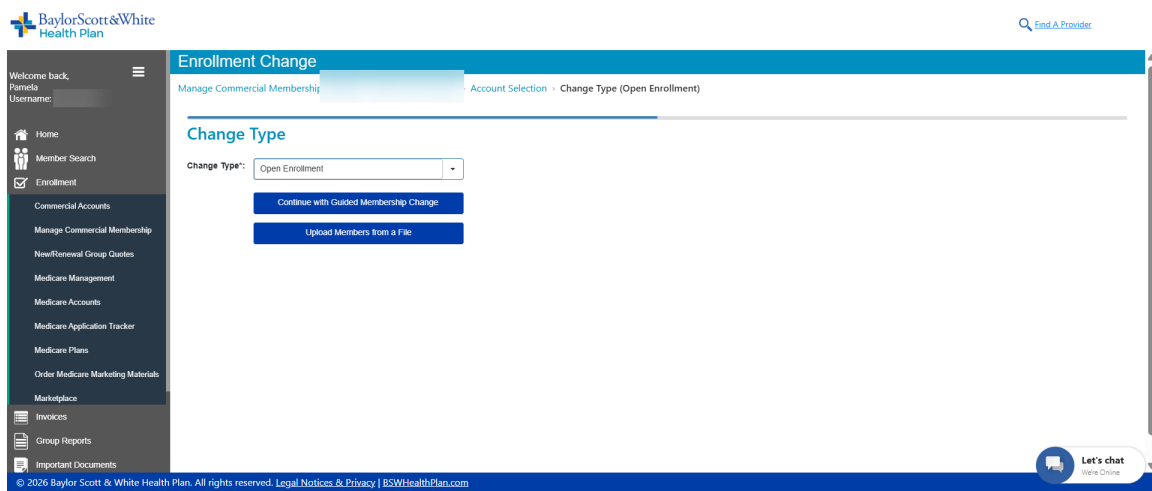
Step 8: Upload the updated spreadsheet into the member upload section and follow any instructions regarding errors, and you can correct the errors until you receive a successful load.

Step 9: Review your membership upload in the Change Summary and once all members display a green check mark, then you will be ready to submit.

Step 10: Click Submit and this spreadsheet submission will be shown in the submitted section on the dashboard.

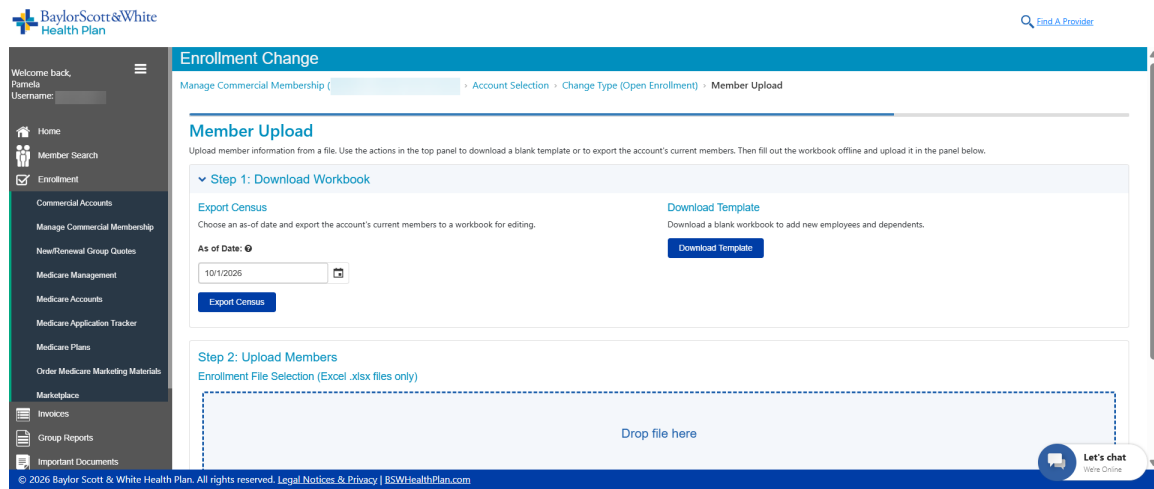


The screenshot shows the Baylor Scott & White Health Plan dashboard. The left sidebar contains navigation links: Home, Member Search, Enrollment (selected), Commercial Accounts, Manage Commercial Membership, New/Renewal Group Quotes, Medicare Management, Medicare Accounts, Medicare Application Tracker, Medicare Plans, Order Medicare Marketing Materials, Marketplace, Invoices, Group Reports, and Important Documents. The main content area is titled 'Start a Change' and includes a 'Start a Change' button. Below this is a search bar for 'Filter by change ID, change type, account, tax ID, or subscriber' and a 'Search Enrollments' button. The 'Submitted' section shows three 'Open Enrollment' cards (#1137, #1267, #1266). Each card displays 'Top Account Id', 'Tax Id', and a table of subscribers with columns for Status, Subscriber Name, and ID. The status for all subscribers is 'Processed' with a green checkmark. A 'Let's chat' button is in the bottom right corner.



The screenshot shows the Baylor Scott & White Health Plan dashboard with the 'Enrollment Change' section selected. The left sidebar is the same as the previous screenshot. The main content area is titled 'Enrollment Change' and includes a breadcrumb trail: 'Manage Commercial Membership' > 'Account Selection' > 'Change Type (Open Enrollment)'. The 'Change Type' section has a dropdown menu set to 'Open Enrollment' and two buttons: 'Continue with Guided Membership Change' and 'Upload Members from a File'. A 'Let's chat' button is in the bottom right corner.

Note: Download a Template for a new group submission.



Welcome back, Pamela
Username: [redacted]

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Manage Commercial Membership
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Medicare Accounts
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Medicare Plans
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Invoices
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Enrollment Change
Manage Commercial Membership ([redacted]) > Account Selection > Change Type (Open Enrollment) > Member Upload

Member Upload
Upload member information from a file. Use the actions in the top panel to download a blank template or to export the account's current members. Then fill out the workbook offline and upload it in the panel below.

Step 1: Download Workbook

Export Census
Choose an as-of date and export the account's current members to a workbook for editing.

As of Date: 10/1/2026

Export Census

Download Template
Download a blank workbook to add new employees and dependents.

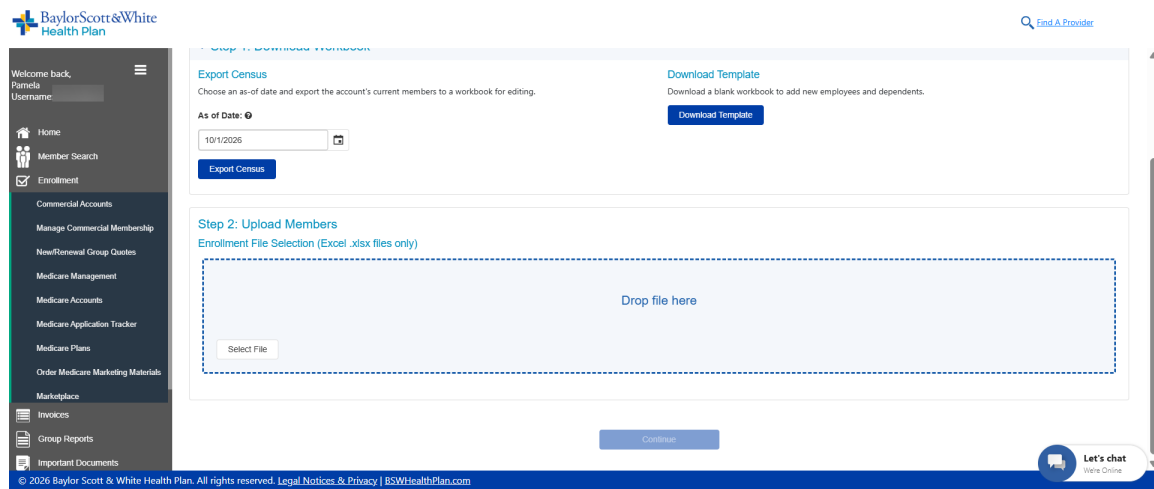
Download Template

Step 2: Upload Members
Enrollment File Selection (Excel .xlsx files only)

Drop file here

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Welcome back, Pamela
Username: [redacted]

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Step 1: Download Workbook

Export Census
Choose an as-of date and export the account's current members to a workbook for editing.

As of Date: 10/1/2026

Export Census

Download Template
Download a blank workbook to add new employees and dependents.

Download Template

Step 2: Upload Members
Enrollment File Selection (Excel .xlsx files only)

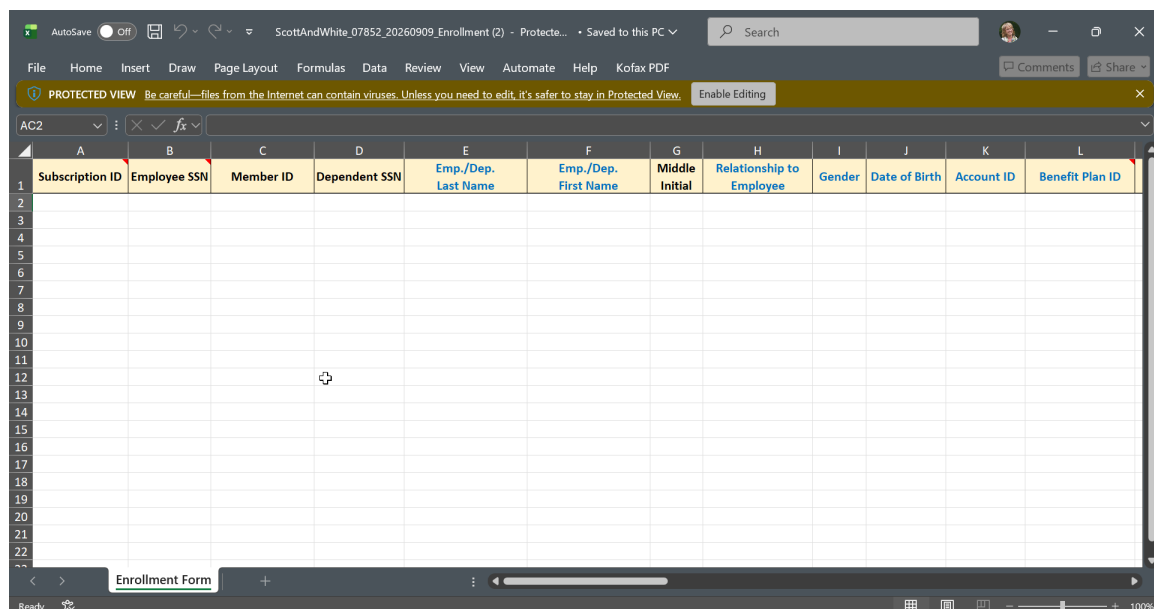
Drop file here

Select File

Continue

Let's chat
Write Online

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AutoSave: Off

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Kofax PDF

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

	A	B	C	D	E	F	G	H	I	J	K	L
	Subscription ID	Employee SSN	Member ID	Dependent SSN	Emp./Dep. Last Name	Emp./Dep. First Name	Middle Initial	Relationship to Employee	Gender	Date of Birth	Account ID	Benefit Plan ID
1												
2												
3												
4												
5												
6												
7												
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9												
10												
11												
12												
13												
14												
15												
16												
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18												
19												
20												
21												
22												

Enrollment Form

Ready

Resolve Errors:

Row	Member	Errors
2		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
3		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female. Date of Birth: Date of birth must be a valid date and cannot be in the future.
4		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
5		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
6		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
7		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
8		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
9		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Dependent SSN: Enter a valid Dependent SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
10		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Dependent SSN: Enter a valid Dependent SSN in the format 123-45-6789. Gender: Gender must be Male or Female.
11		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
12		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
13		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
14		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
15		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
16		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
17		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
18		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
19		Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
20	Rose Johnson	Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.
21	Sara Copeland	Employee SSN: Enter a valid Employee SSN in the format 123-45-6789 Gender: Gender must be Male or Female.

5 10 20


Find A Provider

Welcome back, Pamela
Username:

Home
Member Search
Enrollment

Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Materials
Marketplace
Invoices
Group Reports
Important Documents

Manage Commercial Membership () > Account Selection > Change Type (Open Enrollment) > Employee Selection > Change Summary

Change Summary (Open Enrollment)

New Employee

Status	Subscription Number	Employee	Members	Add Dependent	Remove Employee
			4	Add Dependent	

Status	Name	Relationship	Medical	Dental	Life	Remove
		Self	GPG25D28_01911	None	MLLIF502_01911	
		Spouse	GPG25D28_01911	None	None	
		Child	GPG25D28_01911	None	None	
		Child	GPG25D28_01911	None	None	

Status	Subscription Number	Employee	Members	Add Dependent	Remove Employee
	1000199495	Dustin Smith	5	Add Dependent	

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Find A Provider

Welcome back, Pamela
Username:

Home
Member Search
Enrollment

Commercial Accounts
Manage Commercial Membership
New/Renewal Group Quotes
Medicare Management
Medicare Accounts
Medicare Application Tracker
Medicare Plans
Order Medicare Marketing Materials
Marketplace
Invoices
Group Reports
Important Documents

Status	Name	Relationship	Medical	Dental	Life	Remove
		Spouse	GPG25D28_01911	None	None	
		Child	GPG25D28_01911	None	None	
		Child	GPG25D28_01911	None	None	

Status	Subscription Number	Employee	Members	Add Dependent	Remove Employee
			5	Add Dependent	
			1	Add Dependent	
			2	Add Dependent	
			1	Add Dependent	
			2	Add Dependent	

10 25 50 100

Page 1 of 1 (5 Items) 1

Submit Save as Draft Download Summary Cancel

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Exceptions to the rules

There are times that a transaction cannot be processed through the enrollment process on the self-serve portal. If this happens, you will need to contact the enrollment department to request the exception and submit the necessary documentation and application for your requested transaction.

Note: Here are some of the transactions that will need to go through the exception request process with the enrollment department.

- Life Only enrollments
- Enrollments outside of the allowed enrollment date
- Large documentation that is more than 25 pages , documentation that is > 20 MB, or cannot be submitted in PDF format
- Enrollment submitted for New Employee and termination needed before effective
- Transaction submitted such as termination that needs to back out, and the termination does not go into effect

Step 1: Click Here for the latest [enrollment application](#)

Step 2: Email your exception request to
 HPGROUPENROLLMENT@BSWHealth.org

Appendix A – Enrollment event matrix

Enrollment Event	Transaction Type	Documentation Required	Effective Date Rules
New Employee	Add Active Employee	No	Calculated by waiting period rules
Open Enrollment	Add/Edit Active Employee	No	Group OE rules
Marriage	Add Dependent/Edit Employee	Marriage Certificate	Based on event date
Birth	Add Dependent	Birth Certificate if requested	Based on DOB

Adoption	Add Dependent	Adoption Documentation	Based on event date
Loss of Other Coverage	Add Employee/Dependent	Proof of Coverage Loss	Based on event date
Court Ordered Dependent	Add Dependent	Court Order Required	Based on event date
COBRA	Edit Active Employee	Depends on group type	COBRA rules apply

Required documentation matrix

Transaction	Requirement
Name Change	Supporting Documentation Required
DOB Change	Supporting Documentation Required
Gender Change	Supporting Documentation Required
SSN Change	Documentation Encouraged
Court Ordered Dependent	Court Order Required