



Client Resources Website

[\(www.CignaClientResources.com\)](http://www.CignaClientResources.com)

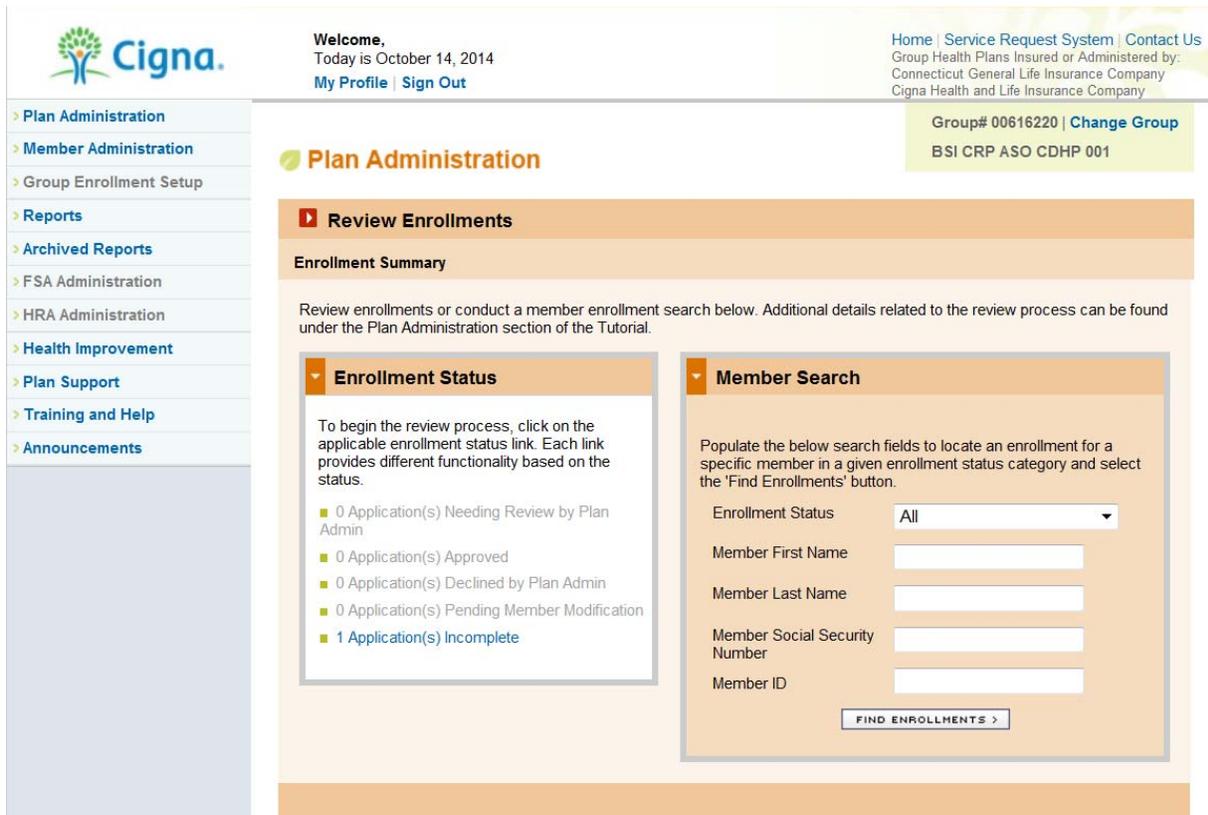
Plan Administration

Last Updated: December 18, 2014

The Plan Administration section is used to manage enrollments that are process by an employee via myCigna.com or manage enrollments created by a user in CRP that have now queued into a specific status. Until the enrollments have been cleared from the queue, users with update enrollment access will continue to receive daily email reminders that the enrollments need attention.

Under the Plan Administration Dashboard enrollments are queued into categories. The enrollment category will have the number of enrollments in that category and will become a blue link. If the category is grey, there are no enrollments. The categories are:

-  **Needing Review by Plan Admin**
-  **Approved**
-  **Declined by Plan Admin**
-  **Pending Member Modification**
-  **Incomplete**



The screenshot displays the Cigna Plan Administration interface. At the top left is the Cigna logo. The top right contains navigation links: Home, Service Request System, and Contact Us, along with information about the Group Health Plans. A central banner shows the user's group information: Group# 00616220 and BSI CRP ASO CDHP 001. A left sidebar lists various administrative functions such as Plan Administration, Member Administration, and Reports. The main content area is titled 'Plan Administration' and features a 'Review Enrollments' section. This section includes an 'Enrollment Summary' with a list of application statuses: 0 Needing Review by Plan Admin, 0 Approved, 0 Declined by Plan Admin, 0 Pending Member Modification, and 1 Incomplete. Below this is a 'Member Search' form with fields for Enrollment Status (set to 'All'), Member First Name, Member Last Name, Member Social Security Number, and Member ID, and a 'FIND ENROLLMENTS >' button.

Needing Review by Plan Admin

The needing review by Plan Admin queue is used for enrollments initiated by the employee via www.myCigna.com (all employees) or Cigna.com/enroll (new hires). The function is available to all groups, and can be turned on and off at any time. To turn the employee capabilities on please contact your Cigna service representative for assistance.

When an enrollment is processed via myCigna.com or via the Cigna.com/enroll site the enrollments are queue for plan administration review. There are a few enrollments which will process directly that will not need plan administration review:

- Add/Update Student status (ANY student status field)
- Demographics changes that DO NOT affect benefit selection (i.e. phone number or email address updates).
- Add/Update Beneficiary
- Add/Update primary care physician (PCP).

Election Preview Screen

Review Enrollments

Enrollment Summary

Review enrollments or conduct a member enrollment search below. Additional details related to the review process can be found under the Plan Administration section of the Tutorial.

Enrollment Status

To begin the review process, click on the applicable enrollment status link. Each link provides different functionality based on the status.

- 0 Application(s) Needing Review by Plan Admin
- 0 Application(s) Approved
- 0 Application(s) Declined by Plan Admin
- 0 Application(s) Pending Member Modification
- 1 Application(s) Incomplete

Member Search

Populate the below search fields to locate an enrollment for a specific member in a given enrollment status category and select the 'Find Enrollments' button.

Enrollment Status: All

Member First Name:

Member Last Name:

Member Social Security Number:

Member ID:

FIND ENROLLMENTS >

If there are Enrollments in the Needs Review, Pending or Incomplete enrollment queues, all CRP users will receive a reminder email with instructions to check their enrollments. The email will generate until the enrollment has been processed and is no longer in the queue.

Needing Review by Plan Admin – This category lists all members who enrolled and clicked "Agree to Enrollment." You can either approve, decline or set these enrollments to pending.

Approved – This category lists enrollments that you have approved, but have not yet sent through the billing and claims processing system. This function is usually represents all the enrollment queues up for Open Enrollment. Enrollments will no longer appear in this category once they have gone through processing. **Note:** If the plan is in Open Enrollment, approved enrollments will not process until the plan's posting date (Script closing date). Once the enrollments are processed, they will appear on the **Member Election** report, located under the Eligibility Reports.

Declined by Plan Admin – This category lists all enrollments that you declined. Applications should be declined anytime a member is not eligible to enroll in the benefit plan (i.e. terminated prior to coverage, part-time employee, etc.) or if it is a duplicate enrollment. Declined enrollments will stay in the declined queue for 14 days after the declined date.

Pending Member Modification - This category lists all members that you set to pending. Applications should be set to pending anytime there is incorrect data or information needs to be verified with the member before the enrollment is approved.

Incomplete – This category lists all enrollments where the "Agree to Enrollment" button was not selected. This can happen if the system times the user out; if the member stopped halfway through the enrollment; or the member was viewing current information and clicked on an update link, but did not click "Agree to Enrollment" again.

To complete an Incomplete/Pending member Email

After 12pm EST a process will run within CRP to identify all enrollments that are in a Pending or Incomplete enrollment status. If your group is identified as having one of these enrollments then an auto-generated email will be sent daily until the enrollment is cleared. To clear a Pending or Incomplete enrollment follow these steps:

- 1 Log into the Client Resources Portal
- 2 Click on Plan Administration
- 3 Click on the link that says '# Applications Incomplete' or '#Applications Pending'
- 4 Note the SSN or Member id
- 5 Click on Member Administration
- 6 Select Update Member or Dependents
- 7 Search for member by SSN or Member ID
- 8 Once you have located the member, scroll down to the Enrollment History.
- 9 Click on enrollment that is in Incomplete or Pending status
- 10 Complete any necessary changes and proceed through enrollment until you have reach the Terms and Conditions page
- 11 Agree to the Terms and Conditions

If the enrollment is no longer a valid enrollment click on the 'Cancel or Decline' enrollment button at the bottom of the enrollment screen.

Enrollment Preview

Review Enrollments

Enrollment Summary > Enrollment Preview

Enrollments can be approved, declined or set to pending directly from this screen by checking the check box next to the member's name and selecting the appropriate action ('Approve Selected', 'Decline' or 'Set to Pending'). You may also click on a member's name to review an enrollment in detail.

To approve, decline or set to pending more than one enrollment at a time, check the box next to each member's name and select the appropriate action. To approve, decline or set to pending all enrollments on a given screen, check the 'Select All' box and select the appropriate action.

Note: A reason is required before an enrollment can be declined or set to pending.

View: Applications Approved Sorted by: Member Name 1-1 of 1 Prev | Next

<input type="checkbox"/> Select All	DECLINE	SET TO PENDING	Reason						
Member Name	Member SSN	Member ID	Plan Script	Reason for Enrollment	Approved Effective Date	Hire Date	Subgroup	Class	
<input type="checkbox"/>		101131142	Open Enrollment 05/01/11	Open Enrollment	05/01/2011	03/25/2010	Founders Network	All Others	
Enrollment Status: Approved			Member Benefits: Consumer Advantage Open Access Network, Dental Indemnity, Basic Life (Employee), AD&D (Employee)			Requested Effective Date: 05/01/2011			
Salary: \$10.00/Hourly			Joe Spouse Benefits: Consumer Advantage Open Access Network, Dental Indemnity			Requested Effective Date: 05/01/2011			
Approve User ID: Eric			Months of Continuous Coverage for Michelle Torres: 12+			Months of Continuous Coverage for Joe Smith: 12+			

The Enrollment Preview page will be populated with enrollments specified by your selection or query. This screen will display high level information for each member (i.e. name, Social Security Number (SSN), salary, benefits, hires date, etc.). To view an individual enrollment in detail, click on a [member's name](#).

The system will display 50 enrollments per page within a selected category or query. If you have more than 50 enrollments, use the "Prev" and "Next" links, located at the top and bottom of each page, to navigate between the pages of your enrollment listings. You can switch between enrollment statuses by selecting the appropriate option in the "View" dropdown list near the top of the screen.

The default setting displays enrollments sorted in ascending order by Member Name, but you may also sort by Member SSN, Member ID, Plan Script, Reason for Enrollment, Approved Effective Date, Date of Hire, Subgroup or Class.

Enrollment Detail

Member Information	Update
Personal Information	
* First Name	<input type="text" value="Michelle"/>
* Last Name	<input type="text" value="Torres"/>
Social Security Number	
* Birth Date	<input type="text" value="10"/> / <input type="text" value="22"/> / <input type="text" value="1978"/> MM/DD/CCYY Format
* Months of Continuous Coverage	<input type="text" value="12+"/>
* Gender	<input type="text" value="Female"/>
* Marital Status	<input type="text" value="Married"/>
Marriage Date	<input type="text"/> / <input type="text"/> / <input type="text"/> MM/DD/CCYY Format
* Salary (in US Dollars)	<input type="text" value="10.00"/> * per <input type="text" value="Hourly"/>
Classification	
Subgroup	Founders Network
Class	All Others
Identification	
Reason for Enrollment	Open Enrollment
* Hire Date	<input type="text" value="03"/> / <input type="text" value="25"/> / <input type="text" value="2010"/> MM/DD/CCYY Format
Requested Effective Date	May 1 2011
Approved Effective Date	May 1 2011

Clicking on a member's name on the Enrollment Preview screen will bring you to the Enrollment Detail page (above), which displays all enrollment information for the selected member. The editable and required fields can be updated and saved on this screen.

If you make any changes to these fields, you must click the "Save Changes" link at the bottom of the screen. If a member has elected Health Care FSA or Dependent Care FSA, or if there is an employer contribution for Health Care or Dependent Care FSA, the Payroll Frequency, Date of First Contribution and Pay Periods Remaining are required for approval. Enter the required information and select the "Save Changes" link at the bottom of the Enrollment Detail screen. If you use the "Update" link within the My FSA section instead, you will be required to enter these values directly on the enrollment screen itself. If any of the required fields are missing, the appropriate error message will display.

If you need to make additional changes (i.e., incorrect city, state or zip code, benefits, etc.), click the "Update" link within the appropriate section. This will take you to the corresponding enrollment screen, where you can make the appropriate changes to modify the enrollment. Click the "Next Step" button until you are presented with the Enrollment Summary screen, check the disclaimer box and press the "Agree to Enrollment" button. The enrollment will now be in an Approved status. When reviewing change enrollments, all changes will be highlighted in green and bolded to simplify the review process.