

Your guide to secure online enrollment at fallonhealth.org

Getting started

Log in to secure online enrollment at fallonhealth.org. Enter your User Name and Password then click on the "Log in" button.

Making inquiries – finding an existing subscriber

Subscriber quick search. When logged in, click on "Subscriber Quick Search" at the top of the screen or use the "Search" option within the top orange bar and the search options will appear:

- **Last name search** – enter as much of the last name as you have and click on the "Search" button. From the search results, you can click on the name of a subscriber to navigate to that record.
- **First name search** – enter as much of the first name as you have and click on the "Search" button. From the search results, you can click on the name of a subscriber to navigate to that record.
- **SSN search** – enter a subscriber's full SSN and click on the "Search" button. The subscriber matching this SSN will appear and only the last 4 digits of the SSN will be displayed. From the search results, you can click on the name of a subscriber to navigate to that record.

Group and employees view, and exporting the roster

- **Group list** – all commercial (Medicare currently not available) group numbers associated with your secure login will be presented along with the corresponding plan and company.
- **View employees in the group** – click on the group number link to view all employees for the selected group.
- **Exporting the roster** – clicking on the export roster link will export a group roster which will open in a Comma Separated Value format (*.csv). Once the file has opened in Microsoft Excel (or another spreadsheet program), some columns may require formatting (*For example: Member ID will need to be formatted as a number. Date fields should be formatted to date data type and zip fields can be formatted as custom data type 00000 to display all 5 digits.*).

Select the column that needs formatting, right click and select "Format Cells". Choose either a number, date or custom category for the corresponding field.

Adding employees and dependents

Add employee

- Click on the "Group List" tab in the top orange bar. This will bring you back to the "Group List" to add an employee to a particular group.
- Click on the "Add Employee" link on the corresponding group line to perform the following functions:
 - Add a new hire
 - Add an employee during Open Enrollment
 - Add employee for any other reason that can be specified in the remarks section

Submit brings you to final screen.

Submit to Fallon forwards new hire transaction to Fallon Health for processing.

General note for the application:

- **Blue buttons** = save for later
- **Red buttons** = discard changes
- **Green buttons** = submit changes to Fallon Health for processing

If new hire has NO dependents, perform one of the following actions:

- **Discard** – discards all changes.
- **Submit** – forwards new hire transaction to Fallon Health for processing.
 - The changes for SUBSCRIBER NAME have been submitted.
 - Transaction Number: xxxxxxxxxxxx
 - Transaction Effective Date: mm/dd/yyyy
 - Changes will be available in the roster within 72 business hours

If new hire has dependents:

- **Save and Add Dependent** – saves the new hire and allows you to add dependents.
- **Click on “Add Dependent”** and following screen allows you to enter dependent’s data.
- **Click “Save”** to return to New Hire page and see dependent added (bottom of page)
- For each additional dependent, **click “Add Dependent”**. Click “Save” when additional dependent information is complete.
- Once all dependents have been added, click **“Submit to Fallon”** button.

Editing employee and dependent information

Editing employee. Starting at your “Group” list, you can either conduct a Subscriber Quick Search or locate the employee by clicking the group number hyperlink.

Once you have found the member you are looking for, click on their name. There is an edit link at the bottom of the member detail on the lower right hand side of the page. Once you click “Edit”, you can complete the following changes:

- **Demographic Change** – allows you to change demographic related information, such as First Name, Middle Name, Last Name, Maiden Name, Address related fields, phone number and email. Change Effective Date and Marriage Date can also be changed.
- **Plan Change** – allows you to edit plan information by selection “New Group Number and Product” in the dropdown menu.
- **Open Enrollment** – lets you enter a new effective date and/or a marriage date.
- **Other** – allows you to edit Social Security Number, date of birth, gender, primary language, work phone number, employee number, department number, date of hire and average hours worked.
- **Apply Changes to Dependents** – lets all the changes made propagate to all the dependents associated with this member I.D.
- **Is Mailing Address Different** – allows you to enter the mailing address on the Street Address line, and, if selected, provides the ability to enter or edit the mailing address information.

Save brings you to final screen.

Submit to Fallon forwards changes to Fallon Health for processing.

Discard discharges all changes.

Editing dependent information. Search and select an employee whose dependent information needs to be edited. Click on the “Edit” link corresponding to that dependent. After you click on the “Edit” link, the enrollment change appears once more and allows edits to be made and saved.

Ending coverage

End coverage. Starting at your “Group” list, you can either conduct a Subscriber Quick Search or locate the employee by clicking the group number hyperlink.

Once you have found the member you are looking for, click on the name, and then click the action link “End Coverage”. Select the type of termination that is being made:

- **Termination of employment** – select a reason coverage is ending. If the “Termination of Employment” checkbox is selected, you are presented with the “Remarks Termination of Employee” text box. Fill in the reason for this selection. Clicking on “OK to Terminate” will remove this employee from the roster.

- Change to other insurance – once selected, “Name of Other Insurance” text box appears so you can enter that information. Click “Continue” and a warning will pop up indicating that this subscriber/member will be removed from the roster.
- Other termination reason – once selected, “Remarks for Termination Other” text box appears so you can enter that information. Click “Continue” and a warning will pop up indicating that this subscriber/member will be removed from the roster.

Submitting transactions

- You can view submitted transactions by clicking on the “Submitted Transactions” link in the orange bar at the top of your screen.
- These are transactions that have been submitted to Fallon within the past 30 days.
- You can export transactions by clicking on the “Export Transactions” link.

Unsubmitted transaction tab

- As new transactions are added, the number next to “Unsubmitted Transactions” increases.
- As transactions are submitted, the number next to “Unsubmitted Transactions” decreases.

Unsubmitted new hires

- As new hires are added, the number next to “Unsubmitted New Hires” increases.
- As transactions are submitted, the number next to “Unsubmitted New Hires” decreases.

**If you have any questions or concerns,
please call us at 1-800-333-2535**

