2021 CORNERSTONE MEDICAL MUTUAL COSE MEWA FORMFIRE SUBMISSION GUIDE

STEP BY STEP GUIDE TO SUBMITTING A MEDICAL MUTUAL COSE MEWA SOLD CASE VIA FORMFIRE

Cornerstone
Broker Insurance
Services Agency, Inc.

2021 COSE MEWA Sold Case Step By Step Process Guide

This is Cornerstone's step by step process guide for submitting an MMO COSE MEWA Sold Case via Formfire. If at any point you need assistance during this process, please contact your Cornerstone Broker Advisor.

Before you Begin…

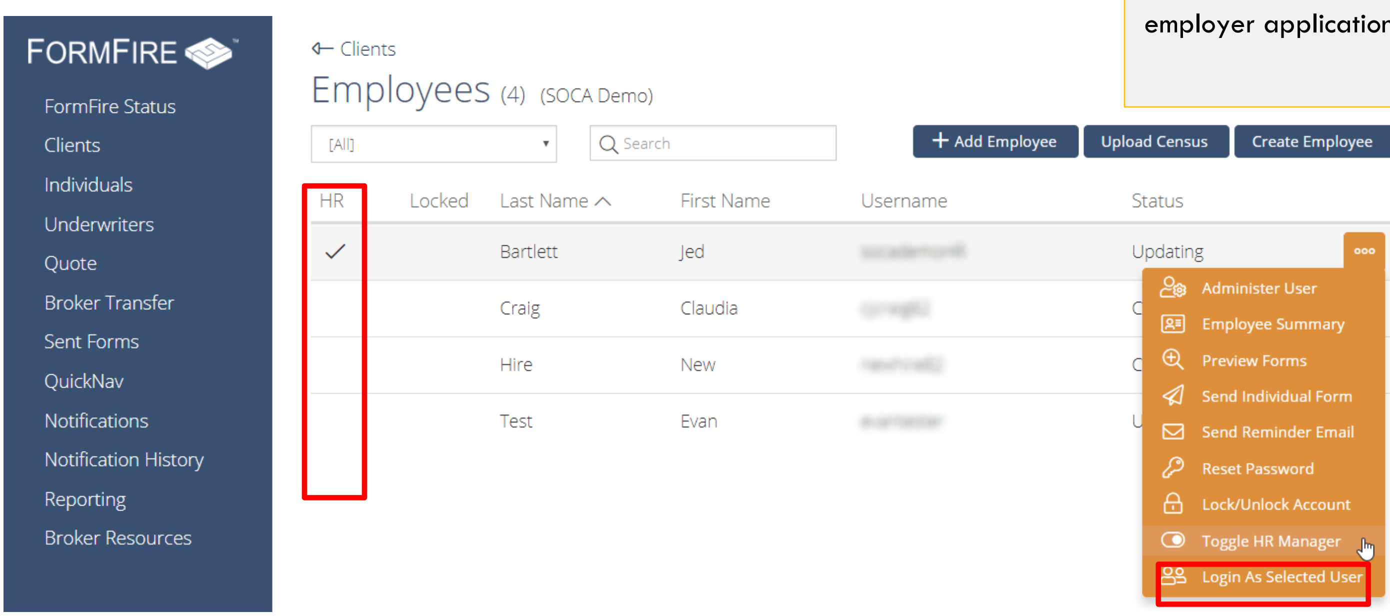
- **<u>Google Chrome</u> is the recommended browser for FormFire.**
- **Check the effective date is correct.**
- **The deadline to submit a sold case with MMO COSE MEWA is prior to the effective date.**

<u>STEP 1:</u>

Check for Toggled HR Admin and Completed Employer Group Application

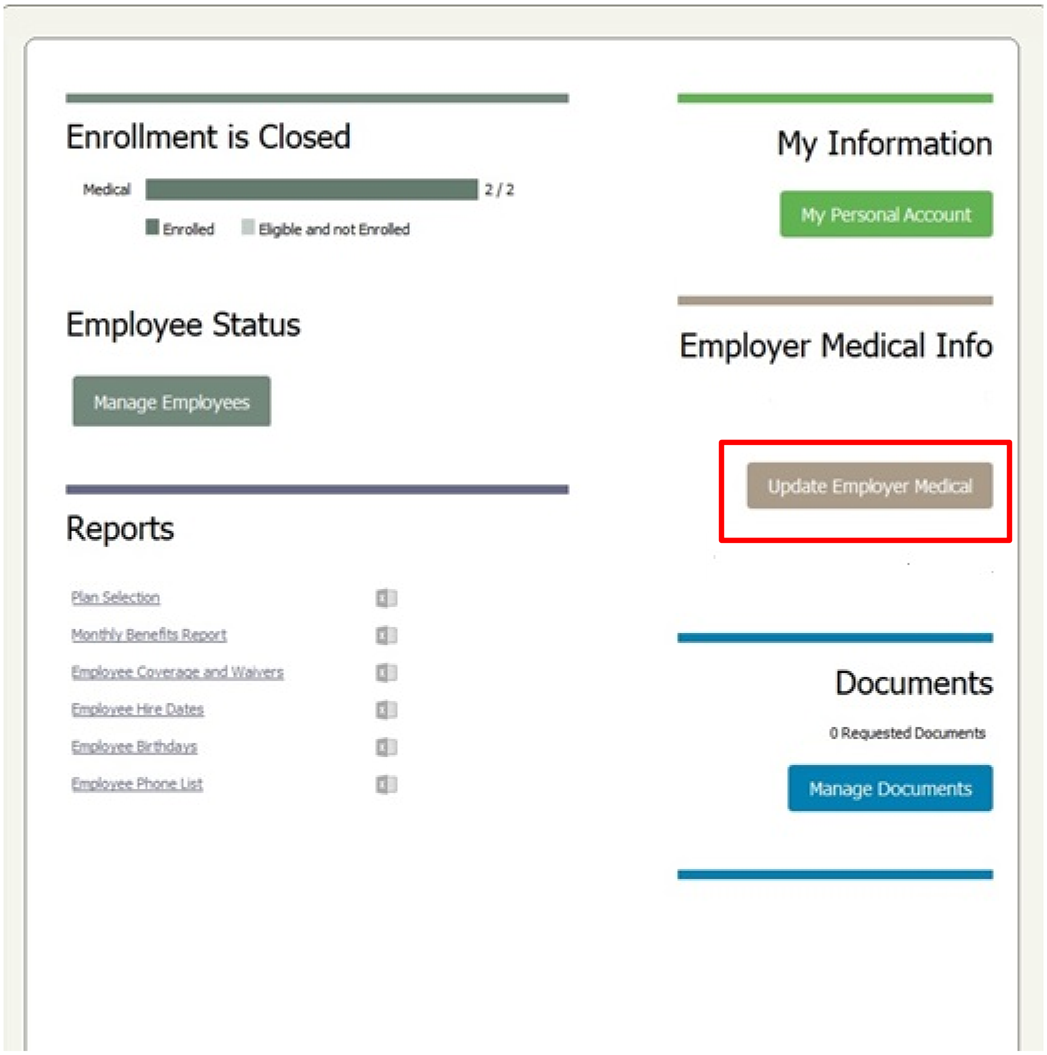
- Login to Formfire.
- Click on the **Orange Box** next to your client.
- Go to **Employee List.**
- Once list generates, find the HR Admin's name and make sure that there is a check mark to the left of the name. This means that the HR Admin is 'toggled'. (See Screenshot Below)
- **If HR is not checked next to an employee**
  - Click on the **Orange Box** next to the desired employee and click '*Toggle HR Manager*'.

?What does toggle mean? Toggle means that the person is checked as the HR Admin and given access to benefit administration. They will also be the ones completing the employer application.



- If not yet completed by the HR Admin, contact the HR Admin and assist the group with filling out the Employer Medical Application.

- On the HR Admin dashboard, the Employer Medical Application is accessible by clicking the Employer Medical button under Employer Medical Info. We recommend walking the HR Admin through the application over the phone.

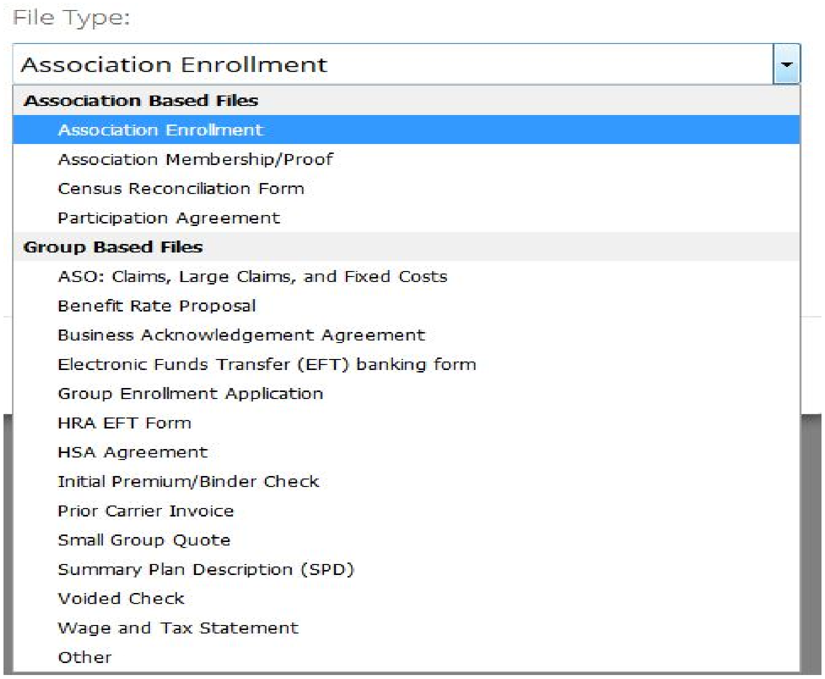


*__Broker Advisor Tip:__ Most commonly missed questions on the employer application are: 1.) Billing Address must be completed even if same as physical address. You cannot just put the word, 'SAME' in all fields. Fields must match exactly.

STEP 2:

Adding Required Documents for your Client

- Go back to client screen.
- Click on **Orange Box** next to the client.
- Select **Manage Documents.**
- On the **Manage Documents** screen, click **Add Document.** We will be adding each required document separately. Very Important! You must add each separate required document by selecting the document's corresponding file type name in the drop down box.



- **LIST OF DOCUMENTS NEEDED TO BE ADDED**
  - ☐ **Pre-Submission Review Form**
  - ☐ **Association Membership/Proof**
  - ☐ **Signed Benefit Rate Proposal**
  - ☐ **Completed EFT Banking Form**
  - ☐ **Voided Check**
  - ☐ **Wage and Tax Statement** (Must be reconciled)
  - ☐ Use **Other** File name field for the following:
    - **If applicable:**
      - ☐ Original Notarized Affidavit
      - ☐ Sole Proprietor Affidavit

- ☐ Medical Mutual HRA Product Selection Form Checklist and Related Documents
- ☐ Medical Mutual Health Savings Account Authorization Setup Forms
- ☐ COBRA Addendum (waiver) if Wage Works Services not being utilized
- ☐ Small Employer Exception Package (SEE): Medicare registration forms for groups with Medicare-eligible participants.
- ☐ Deductible Credit Information Forms

STEP 3:

Send Forms to MMO COSE MEWA

- We are now ready to send the group to Medical Mutual.
- Click on the orange box next to your client.
- Click **Send Forms.**
- Change **Submission Type** to **Sold Group.**
- Change the **Carrier** to **Medical Mutual COSE MEWA.**
- Change the **Form** to **COSE HWT EE App.**
- Under **Attach Files,** check each box associated with all documents listed.

? What if the Send Forms Button is Not yellow and I Cannot Select it? This means errors have occurred at some point during the process. You will be able to see what these errors are at the top of the screen. You will have to go back and correct all errors shown.

*__Broker Advisor Tip:__ Under **Notes for Carrier**, type any changes that have occurred from **Prescreen** to **Sold Group.** Also include the chamber membership number if not already on the Employer Application.

- Next, select **Send Forms.**
- Once pop-up box occurs, click **OK.**
- If a Green banner pops up, your forms have been sent to Medical Mutual.
- You will receive a notification from Formfire that your group has been submitted. If you do not receive this notification in 5 minutes, contact your Cornerstone Broker Advisor.

STEP 4:

Anthem/Cornerstone Case Scrub

- Case is scrubbed for any missing information, which will be sent between the broker and Cornerstone's New Business team.

STEP 5:

Welcome Letter

- Welcome Letter will be delivered to the broker and Cornerstone. The Broker will need to send the Welcome letter to the group.
- In the welcome email there will be a Membership Rep Code used to register on Medical Mutual's website.