Harvard Pilgrim HealthCare

HPHConnect Express Enrollment Job Aid for Brokers

Note: There is a Help section on every page. Click the blue circle with the question mark on the top right side of the page. The steps for each page are located on the body of the ? page.

Log into *HPHConnect* for Employers.

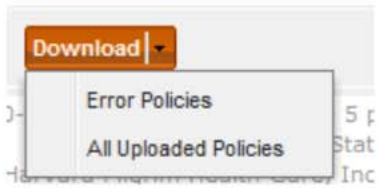
1. Click **"Access Express Enrollment"** on the left navigation bar. This will bring you to the Express Enrollment page. Access Express Enrollment
2. To download the Excel Template, click **"Download Template."** Download Template
3. The Excel Template will open and the highlighted fields at the top of the document are required fields. (See Instructions tab for help filling out the template.)
4. Once the Excel Template is completed and saved, go back to the **Express Enrollment** page on *HPHConnect*. All of the required fields are indicated with a red *. The last required field is choosing the enrollment file. Click **"Browse"** to choose the enrollment file.
5. Click **"Upload Enrollment File."** Upload Enrollment File
6. When the upload is complete, it will bring you to the next Express Enrollment page. This page will indicate how many policies were **uploaded** and how many have **errors** on the page. The policies with errors were not processed.

   7 policies were uploaded but 1 policies contain(s) errors and cannot be processed.
7. The **policies** that are ready for processing will have a check box in the **"Select"** column. The policies that have errors on the page will have a **red "X"** in the **"Select"** column.
   To view the errors, **hover over the red "X"** next to the policy holder.
   - The specific **member** who has the error will have a **red "X"** in the **"Select"** column and will be **highlighted in yellow**. To view the error message on the member, **hover over the red "X"**. You can also view the error message by scrolling over to the field with the exclamation mark and **hover over the highlighted red error**.

IMPORTANT PLEASE READ:

If you want to process the policies without correcting the errors, please skip to Step 11.
If you want to correct the errors and preprocess the file, follow to the next step.

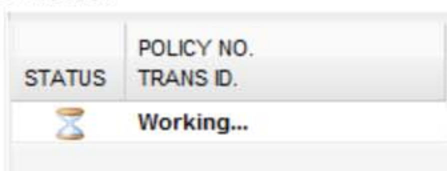
8. To correct errors, click **"Download"** at the bottom of the page.
    - **Error Policies** will download the policies that resulted with an error after upload.
    - **All Uploaded Policies** will download all policies that were uploaded for processing.



Errors will display at the end of the document. Scroll over to view in the **Status** and **Message** field.

9. Save the document and go back to **step 5** and repeat those steps.
10. Click **"Submit Selected Policies."** 

11. **Policy NO Trans ID** column will show **"Working"** as the policies are being processed. A green check mark will display in the **"Status"** column, ID numbers and confirmation numbers will be listed in the **"Policy ID Trans ID"** column once the policies are processed. *The top of the page will also indicate how many policies are **processed** and how many have **errors**.



12. Error policies will have a **red "X"** in the status field and the error message will display in the **"Policy No Trans ID"** column. 

13. Status message will pop-up once the policies are processed.
14. Repeat **Step 8** to correct errors or contact Employer Services for further assistance.
    - Large groups (51+ employees): Call the dedicated account service coordinator. (If you do not know the name of the group's ASC, please call your account executive.)
    - Small groups (50 and fewer employees): Call (800) 637-4751.