Summary of Benefits and Coverage (SBC)

Group SBCs – Updates to the SBC Tool
Instructions to Access System

• Log in to BAE
• Log in to BAP
• Click the Appropriate SSO Link
  – For BAE, click the "View Standard Plan SBC Tool" link
    • Click and expand the Account Summary link
    • Click on the Health Plans link
    • Click the Display button
    • Click the View Standard Plans SBC Tool link near the bottom of the screen
• For BAP, click the "Summary of Benefits and Coverage" link
  • Click Products and Forms
  • Click the Summary of Benefits and Coverage button
• If you enter through either BAP or BAE, you will be taken to the RR Donnelley SBC Tool and logged in. The user will be able to choose to search for Group plan SBCs or Individual (Retail) SBCs. You will be searching for Group Plan SBCs, so please select Group Plan as shown below. Then click on the “Next Step” button.
• Next you will be brought to the main RR Donnelley tool search screen (shown below) with all the fields you can use to narrow down your search for the SBC you need.
• Two fields – Plan Year and Corporate Entity – are mandatory and must be selected before searching can occur.
  – Insure that the correct Plan Year is selected in the Plan Year drop-down list which allows “2014” and “2013” as options.
  – 2014 is the default, but Standard Group plans enacted prior to 2014 are also available. For these, select 2013 for the Plan Year.
• The second mandatory field, Corporate Entity must also be selected before a search can occur.
  – Insure that the correct Corporate Entity (IL, OK, NM or TX) is selected in the Corporate Entity drop-down list.
  – Your home state is the default.
  – If you need to view SBCs from another state, click the down arrow in the field and select another state. Your search results will be filtered by this field value. This field is required.
  – After an appropriate Corporate Entity is selected, the user may press the red Search button to display available SBCs.
### Search Criteria

For Internal Use Only

#### Search for Matching Plans

Choose one or more criteria below to search for matching plans and press search.

- **Plan Year:** 2013
- **Corporate Entity:** IL
- **Product Type Display:** -- Select --
- **Plan ID:**
- **Plan Name:**
- **Plan Description:**
- **Language:** ENG

#### Plan Details

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Product Type Display</th>
<th>Plan ID</th>
<th>Plan Name</th>
<th>Language</th>
<th>Plan Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Edge HCA</td>
<td>IL - Blue Edge HCA</td>
<td>BCE10105</td>
<td>BCE10105 BlueEdge HCA</td>
<td>ENG</td>
<td>$1,500 _$1,500_20%_20%_20%</td>
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<td>BCE10305 BlueEdge HCA</td>
<td>ENG</td>
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<tr>
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<td>BCP42322</td>
<td>BCP42322 BlueChoice PPO</td>
<td>ENG</td>
<td>$250 _$1,000_10_20_35</td>
</tr>
<tr>
<td>Blue Choice PPO</td>
<td>IL - Blue Choice PPO</td>
<td>BCP42323</td>
<td>BCP42323 BlueChoice PPO</td>
<td>ENG</td>
<td>$250 _$1,000_15_30_50</td>
</tr>
<tr>
<td>Blue Choice PPO</td>
<td>IL - Blue Choice PPO</td>
<td>BCP43432</td>
<td>BCP43432 BlueChoice PPO</td>
<td>ENG</td>
<td>$250 _$2,000_10_20_35</td>
</tr>
<tr>
<td>Blue Choice PPO</td>
<td>IL - Blue Choice PPO</td>
<td>BCP43433</td>
<td>BCP43433 BlueChoice PPO</td>
<td>ENG</td>
<td>$250 _$2,000_15_30_50</td>
</tr>
</tbody>
</table>
• Select a matching and state-appropriate Product Type Display from the Product Type Display drop down list.
• All available Product Types are coded and sorted by Corporate Entity (for example, "IL – ", without the quotes)
• Click the red Search button again.
• Your search results will be further filtered and the number of matching SBCs will be reduced by this field value's search criteria.
• Blue Choice PPO has been returned below. Some Product Types contain many matches (3 pages below). Further narrowing via other search fields is shown next.
• If known, the list of returned search results may be further reduced by entering in a Plan ID in the Plan ID field.
• The user may place their cursor in the field and type in a State appropriate Plan ID.
• This field supports the same type of partial search technology used in the previous SBC tool known as Pivot.
• If a whole or partial Plan ID is entered into the Plan ID field, the user should click the red search button again to further filter the returned search results.

**Caution** – The Plan ID field is case sensitive. Entering in an incorrect value will result in the application returning ZERO search results. To restore your previous search results and to try again, clear the incorrect Plan ID value from the field and click the red Search button.
Choose one or more criteria below to search for matching plans and press search.

- **Plan Year**: 2013
- **Corporate Entity**: IL
- **Product Type Display**: IL - Blue Choice PPO
- **Plan ID**: BCP4
- **Plan Name**: 
- **Plan Description**: 
- **Language**: ENG

<table>
<thead>
<tr>
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<th>Plan Name</th>
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<th>Plan Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Choice PPO</td>
<td>IL - Blue Choice PPO</td>
<td>BCP42322</td>
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<td>IL - Blue Choice PPO</td>
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</tr>
</tbody>
</table>
• If known, the list of returned search results may be further reduced by entering in a Plan Description in the Plan Description field.
• The user may place their mouse cursor in the field and type in a state-appropriate Plan Description.
• This field supports the same type of partial search technology used in the previous SBC tool known as Pivot.
• If a whole or partial Plan Description is entered into the Plan Description field, the user should click the red search button again to further filter the returned search results.

**Caution** – The Plan Description field is case sensitive. Entering in an incorrect value will result in the application returning ZERO search results. To restore your previous search results and to try again, clear the incorrect Plan Description value from the field and click the red Search button.
• $15 was entered into the Plan Description field and the results were narrowed accordingly.
• The Plan Name field works just like the Plan Description field – it is case sensitive as well, but offers partial search.
• The RRD SBC Tool contains both Spanish and English SBCs. While the default is English, users may choose to search for either Spanish (SPA) or English (ENG) SBCs or both.
• Once you have located the SBC you wish to customize, click the blue hyperlink in the Product Type column of the search results for the corresponding SBC. The row will be highlighted in green to indicate it has been selected.
• A red Next Step button will appear. Click it.
• The user will be taken to the next customization screen where Coverage Period dates and Coverage For information can be entered.
• Enter in the appropriate Plan Effective and Plan Ending Dates.
• Use MM/DD/YYYY format for English SBCs.
• Use DD/MM/YYYY format for Spanish SBCs.
• Click the Coverage For drop down list.
• Please note that the list contains appropriate values for ALL states in both English and Spanish.
• Choose an appropriate Coverage For value from the drop down list in the correct language for the SBC you are customizing.
• When completed, click the red Generate Proof button.
• The customized SBC will be displayed in draft form.
• Note the "PROOF" watermark in the body of the SBC.
• Proof your SBC.
• Check to ensure you have chosen the correct Plan ID.
• Check to ensure you have chosen the correct SBC language (English or Spanish).
• Check to ensure that the correct Coverage Period dates and Coverage For information appear in the SBCs header.
• If changes are required, click the red Make Changes button.
• The user will be taken back to the Customize SBC screen noted in the steps above.
• If the SBC appears correct, click the red Generate Final Copy Button.
• All of the proofing marks in the document will be removed and the customized SBC will be displayed.
• The customized SBC may be emailed directly to a recipient.
• Your email address is the default.
• Enter in the email address of the individual you wish to send a copy of the final SBC to and click the red Send button.
• A message will display in green text at the top of the screen indicating the email has been sent.
• To send the SBC to another recipient, clear the email address from the Email field, enter in the new email address and click the red Send button again.
• Also the SBC can be saved to your hard drive (see second image on next page).
• To customize a different SBC, click the red Create Another button.

• The user will be taken back to the SBC search screen and the process may be repeated.

• When completed, click the Logout menu item at the top of the screen. The user will be logged out of the RRD SBC Tool.

• **NOTE:** The RRD SBC Tool will automatically log the user out after 30 minutes of inactivity.