YOUR GUIDE to secure online enrollment on fallonhealth.org

Section 1 | Getting started

1. Log in to secure online enrollment at fallonhealth.org
2. If there are numerous plan sponsors associated with your account, you will need to specify a sponsor before you can continue with enrollment.
3. Throughout your session, the name of the chosen sponsor will appear at the top of each screen.

Section 2 | Making inquiries

Inquiry by name

1. Click on Inquiry, and the search menu screen will appear.
2. Click on Subscriber name to open a search screen.
3. Enter the combination of first name, last name and/or plan design specific to your search.
4. Click on Submit.
5. The relevant record(s) will appear on the screen. If multiple records match your criteria, the result will display in a roster format.
6. To view the details for a specific member, click on the member's name to display his/her profile.

Inquiry by Social Security number (SSN)

1. Click on Inquiry, and the search menu screen will appear.
2. Click on Subscriber SSN to open a search screen.
3. Enter the SSN specific to your search.
4. Click on Submit.
5. The relevant record will appear on the screen.

Roster search

1. Click on Inquiry, and the search menu screen will appear.
2. Click on Roster to open the roster search screen.
3. Enter the Plan Date field. The Plan design field will then fill with the plan designs available on that date.
4. Click the down arrow to select the plan design you want to see.
5. Click on Submit.
6. A list of active members enrolled in the group(s) you selected will appear on the screen, including individual effective and, if applicable, term dates. Note the following options:
   - To display dependents for a subscriber, click on the button to the left of the subscriber's name.
   - To display all dependents, click Display all dependents.
   - To display subscribers only, click Display subscribers only.
   - You may "flip" from page to page by clicking on page numbers: 1 2 3 4 5 6 7 8 9 10 …

To print a roster:

- Search for the roster specific to your needs using the roster search.
- To print the entire roster, click on Print roster.
- To print only the contents of the page you are viewing, click on Print screen.
- Click on Print, then OK when the printing is complete.

To download a roster:

- Search for the roster specific to your needs using the roster search.
- Click on Download roster.
- Click on Download.
- Click on Save; specify the location, and click on Save again.
- The file is now saved as a .csv document in the location you specified. It may be opened in Excel.
- If prompted, click on Close when the download is complete.

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Section 3 | Making and viewing changes

Add coverage (use to add a subscriber)

1. Click on Add coverage from the main menu.
2. Enter the information as requested on the screen.
3. All fields identified with an asterisk (*) are required.
4. Click on Add a dependent to add a dependent to a new subscriber contract.
    a. Complete all required fields.
    b. Click Save to subscriber.
5. Click on Submit when finished.
6. Verify the information on the subscriber enrollment verification form.
7. Click on the Submit when finished.
8. If you need to print a temporary ID card, click Print a temporary ID card for this record.

Change existing coverage (use to change a contract or add a dependent)

1. Click on Change existing coverage from the main menu.
2. Search for the record you would like to change.
3. Click on Change coverage.
4. Only the changes that are applicable for this record will appear. Select from the choices on the screen, and click on Continue.
   NOTE: To add a dependent, you must choose Other, and enter a brief explanation under Remarks.
5. Identify the information to change.
6. Click on Submit when finished.
7. If you need to print a temporary ID card, click Print a temporary ID card for this record.

End coverage

1. Click on End coverage from the main menu.
2. Search for the record you would like to terminate.
3. Click on End coverage.
4. Enter the reason for termination, and click on Continue.

Recent transaction summary *(NOTE: This feature enables the user to view work completed by coworkers.)*

1. Click on Recent transaction summary from the main menu to view all online web transactions that have occurred within your company during the last 120 days.
2. Select a Plan date, then choose the Plan design and Group number.
3. Click on Submit.

Applications pending

1. Click on Applications pending (#) from the main menu to view applications that have not yet been submitted to Fallon Health.
2. To open the transaction and complete the activity, click on Update for the row you wish to update. *NOTE: The "Enrollment effective date" for the transaction will be pre-filled with the date you originally entered.*
3. Applications for enrollment or changes are saved to this queue by clicking Save and continue later from any screen.

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

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