Broker Connection Site

Quick Reference Guide

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View Quick Reference Guide

Welcome to Broker Connection

Access commissions, client lists, and more in one convenient place with Broker Connection.

Your Broker Connection account provides access to:

- Application Status
  Check updates on client applications with more status detail.
- Late & cancellation notifications
  At a glance, see who's late and if their policy is canceled. Send reminders to your clients with a click.
- Email ID card links
  Get clients using their coverage right away by emailing a link to their member ID card.
- Commissions quick links
  Access your latest commissions statement from the homepage after logging in.

Who can create a Broker Connection account?

Only brokers already appointed with Blue Shield of California can create Broker Connection accounts.

They may be independent brokers or brokers who own the tax ID number of their agency.

If you are not appointed with Blue Shield of California, you must be associated with an agency (Primary Agent) who is appointed with Blue Shield to create a Broker Connection account.

Account Profile Descriptions

Account Profiles

	Support staff	Sales agent	Subagent	Administrator	Primary agent*
Order sales materials	✓	✓	✓	✓	✓
Use enrollment tools	✓	✓	✓	✓	✓
Access their client list		✓	✓	✓	✓
View their commissions		✓	✓	✓	✓
View application status		✓	✓	✓	✓
Access agency client list			✓	✓	✓
View agency commissions			✓	✓	✓
Create and manage user accounts				✓	✓
Update agency profile					✓
Change direct deposit details					✓

✓ Optional

*Primary agents can create up to 4 other primary agent accounts.

The table below shows what each account profile can do on Broker Connection.

There are 5 types of profiles for Broker Connect accounts.

By default, if you are an appointed Blue Shield broker that is registering for an account for the first time and is not affiliated with an agency, your account profile is automatically set to the highest profile – "Primary Agent role".

Agency Owners and Primary Agents can invite brokers to create an account that is affiliated with their agency and assign a specific role for that individual.

Note:

If you are not appointed with Blue Shield of California, you must be associated with an agency (Primary Agent) who is appointed with Blue Shield to create a Broker Connection account.

Using this Quick Reference Guide

I'M an appointed Blue Shield broker
- View Registration & Login Section
- Skip Account Management Tool Section
- All remain sections applicable

I'M an independent broker that work with an agency
- Skip Registration & Login Section
- View Accepting an Invitation page 40
- All remain sections applicable

I'M an agency owner or primary agent of the agency
- View Registration & Login Section
- View Account Management Tool Section
- All remain sections applicable

Section to View

This guide is written for all audiences and some section may not apply to you.

Please refer to the recommended guidance pathways for using this quick reference guide.

Broker Connection Benefits

Your Broker Connection account provides many essential benefits including:

- **Single location to access sales collateral**
  Quickly and easily access commonly used sales materials including Benefit Highlight brochures, marketing brochures, and much more.
- **Manage your book of business**
  A single location to compare plans and enroll clients, view application status and client list, and access commission statements.
- **Get the latest Blue Shield Marketing Newsletters and Mandates Information**
  Find details and resources on mandates impacting your clients and important updates from Blue Shield.

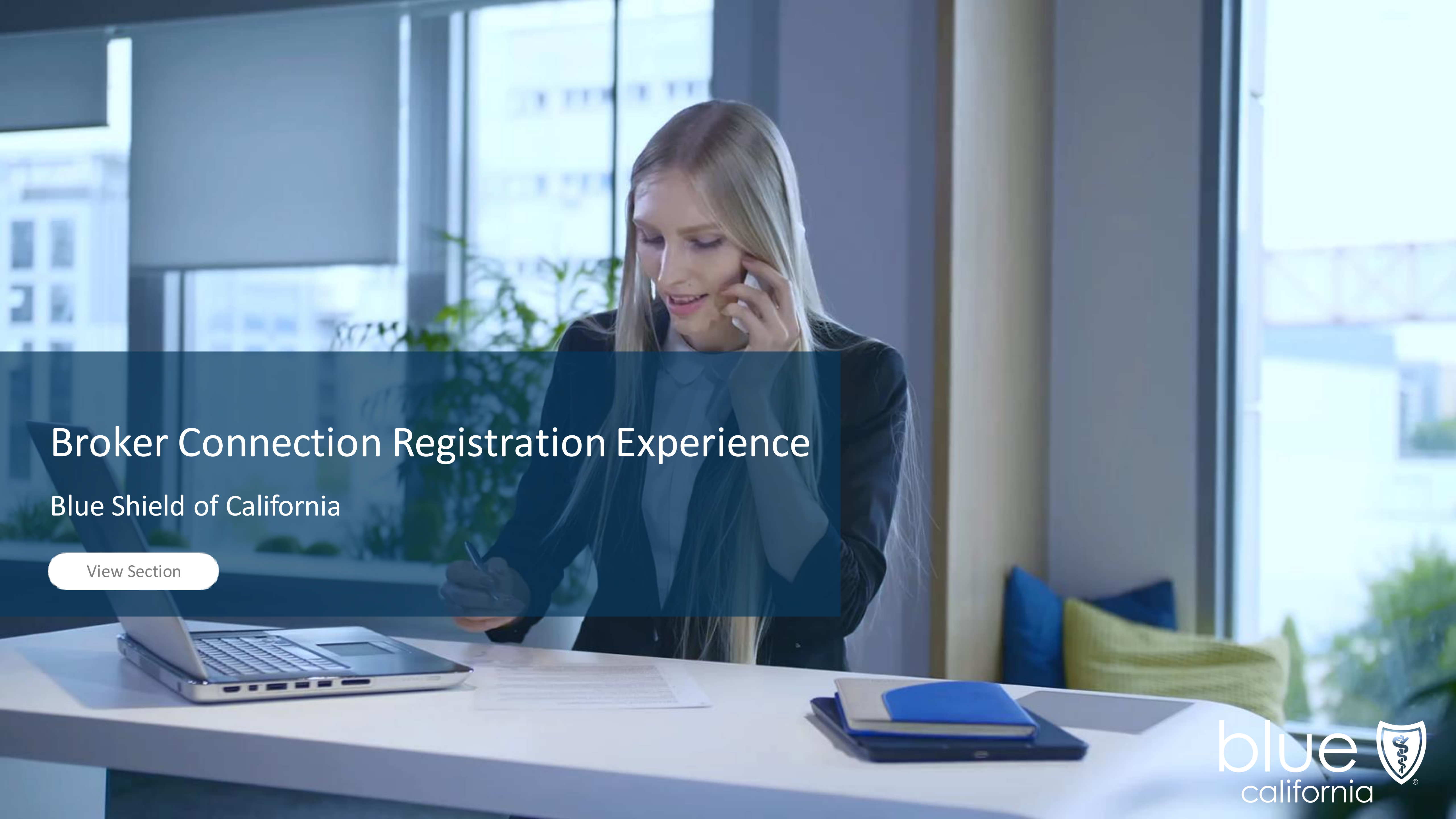
Link to Broker Connection

Blue Shield Broker Connection site:

https://www.blueshieldca.com/producer

Blue Shield Producer Services Phone Number:

1-800-559-5905

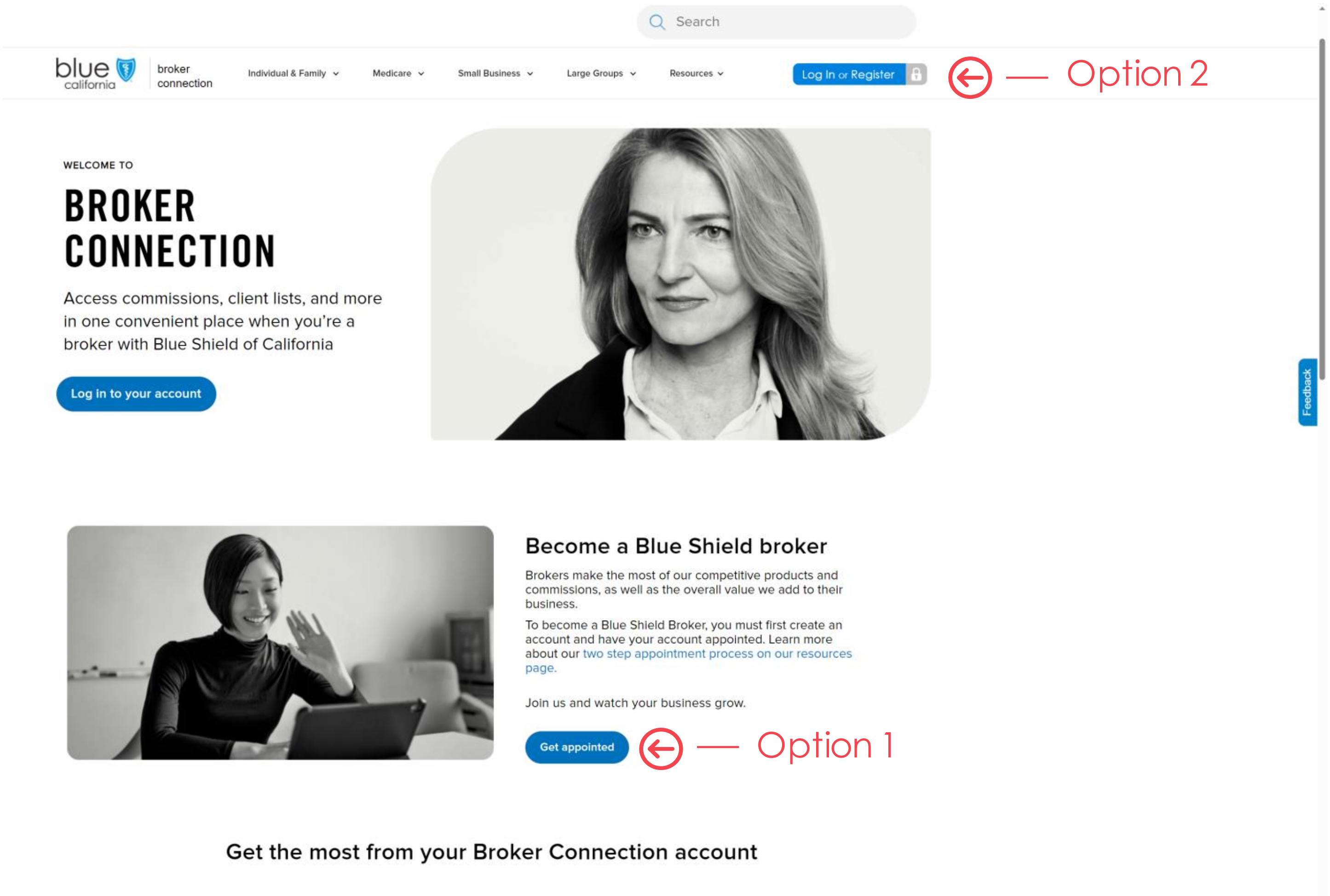


Broker Connection Registration Experience

Blue Shield of California

View Section

Registration Options



Registration Options

Option 1:

Apply for appointment and register.

To become a Blue Shield Broker, you must first create an account and have your account appointed.

Option 2: Create an Account

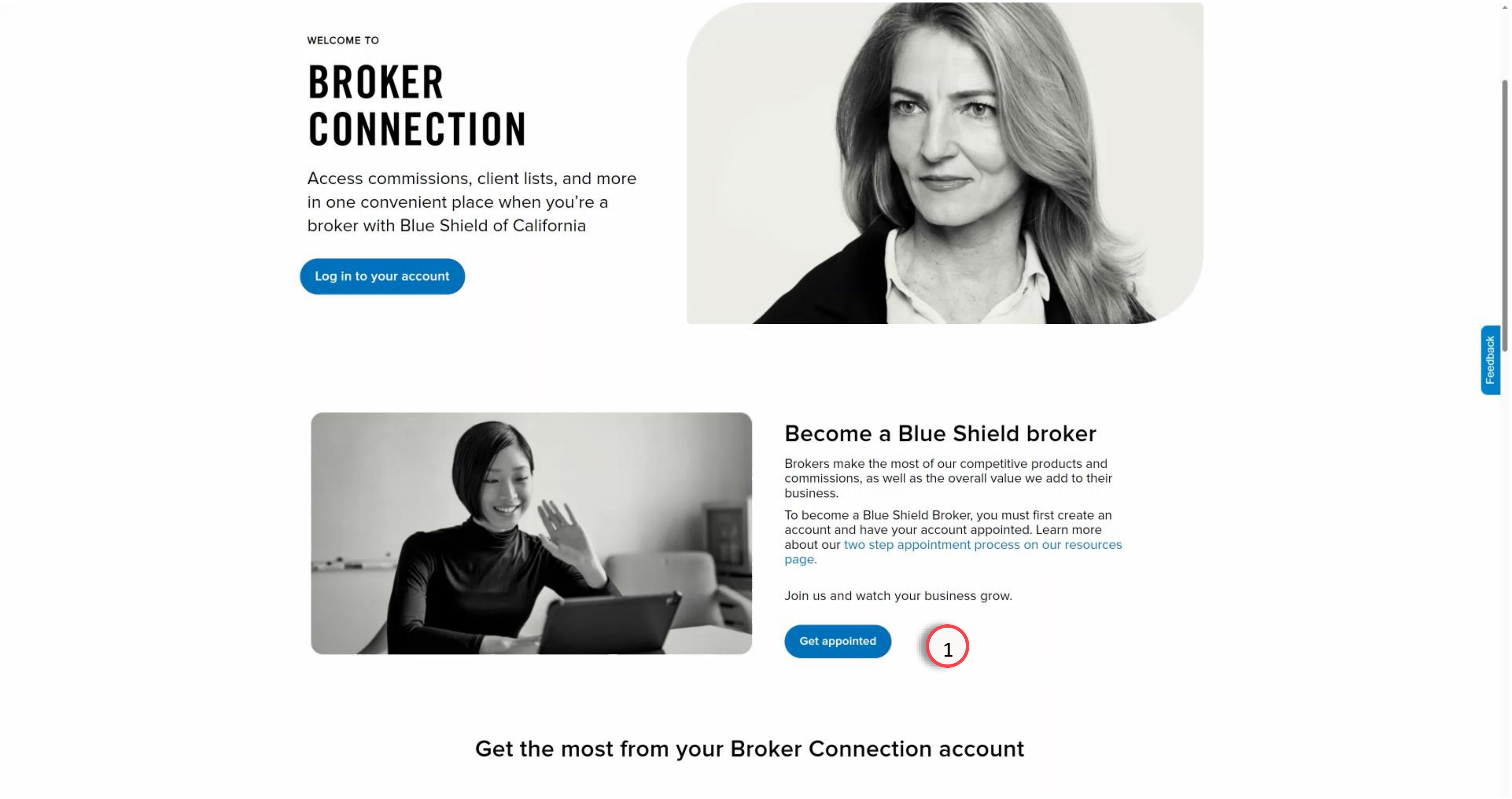
Anyone can create a Broker Connection account. However, your account must be appointed to gain full access to all of our products.

Non-appointed broker

If you're not appointed with Blue Shield but work for a broker who is, ask that broker to create a Broker Connection account for you.

Broker Connection Registration Experience

Option 1: Apply for Appointment



Register

1. Navigate to the Broker Connect homepage and click the **Get Appointed** button.

Broker Connection Registration Experience

Option 1: Apply for Appointment

Step 1: Start application on Appointment Portal

Click on 'Get appointed' to start the appointment process.

If you have already submitted your application, you can log in and check your application status.

Get Appointed

Step 2: Register your account on Broker Connection

Once you register an online broker account, verify your email address, and login.

If you have already submitted your application, you can log in and check your application status.

Check Application Status

Note:

Agents already appointed with Blue Shield of California will be able to create an account on Broker Connection with access to all its tools and resources.

It takes about 5 minutes and 6 quick steps to register as an agency principal/broker on Broker Connection.

Important:

If you are a general agent, or other agency submitting a broker appointment request on behalf of someone else, please ensure you add your email as a secondary email address under the "contact information" section of the application.

Apply for Appointment

Only brokers already appointed with Blue Shield of California can create Broker Connection accounts.

They may be independent brokers or brokers who own the tax ID number of their agency.

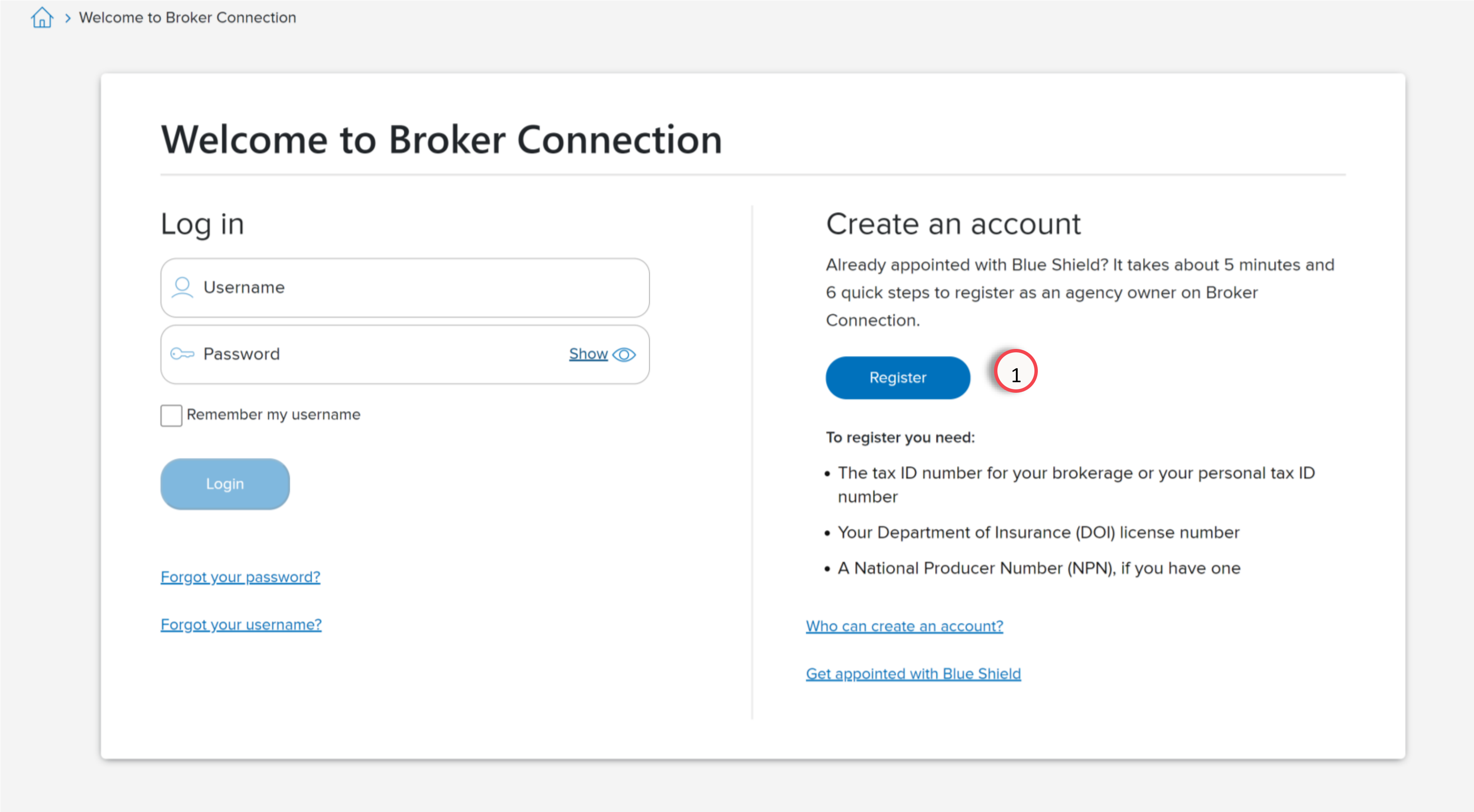
If you're not appointed with Blue Shield but work for a broker who is, ask that broker to create a Broker Connection account for you.

To Apply for appointment, you will need:

- Tax ID number
- DOI (Dept. of Insurance) license number
- Email address
- Both Accident & Health or Sickness and Life licenses
- Errors & Omissions (E&O) Insurance Certificate
- Direct deposit information

Broker Connection Registration Experience

Option 2: Register and Log In



Registration Steps

1. Click the **Register Now** link to register.

Note:

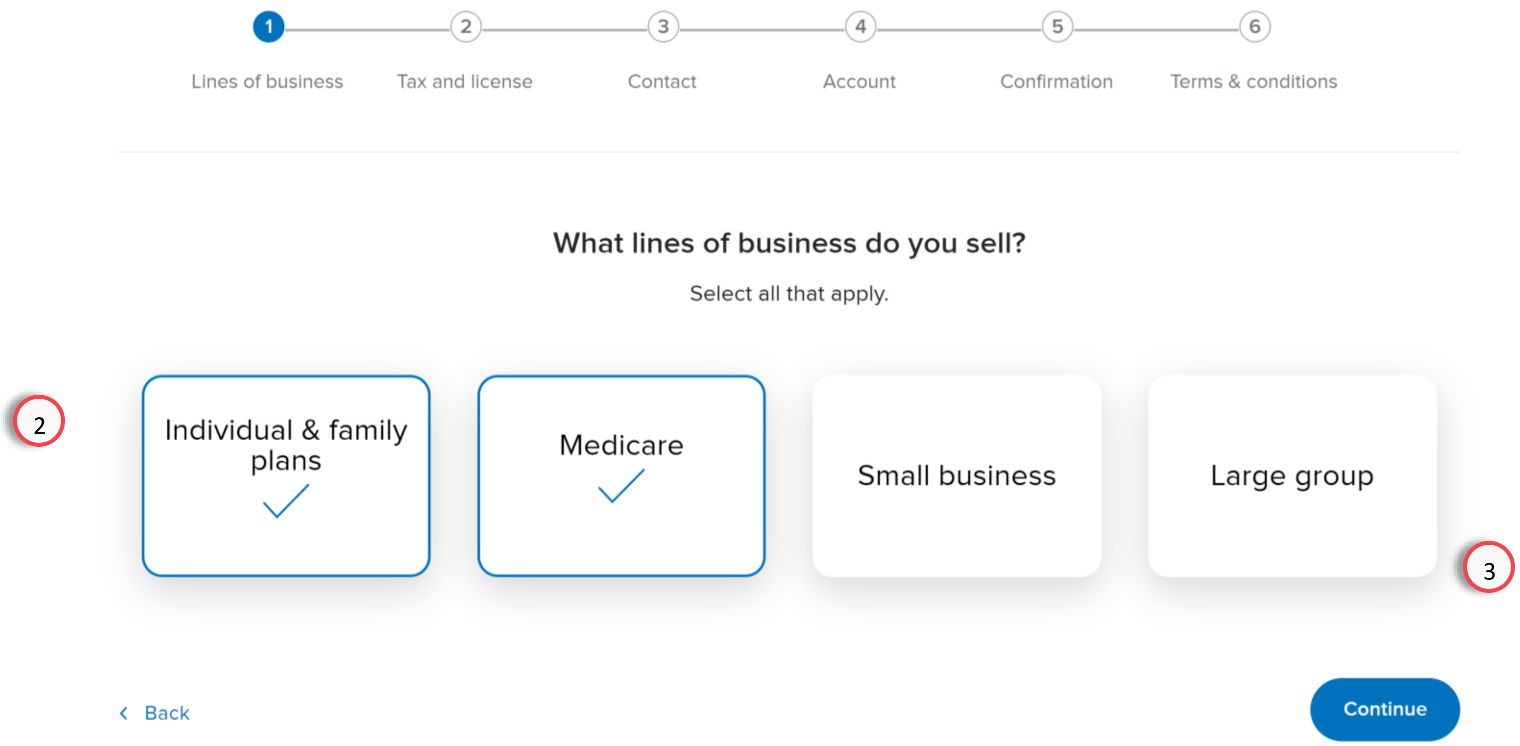
To register for a Broker Connection account, you must be appointed with Blue Shield.

For endorsed agents working under an agency, please contact your Primary Agent for invite to register.

Register for Broker Connection

Important:

Regardless of the option you have chosen, you will follow the same 6 steps.



Registration Steps

Regardless of the option you have chosen (get appointed or register), you will follow the same steps.

This is the first of a 6-step process to create an account.

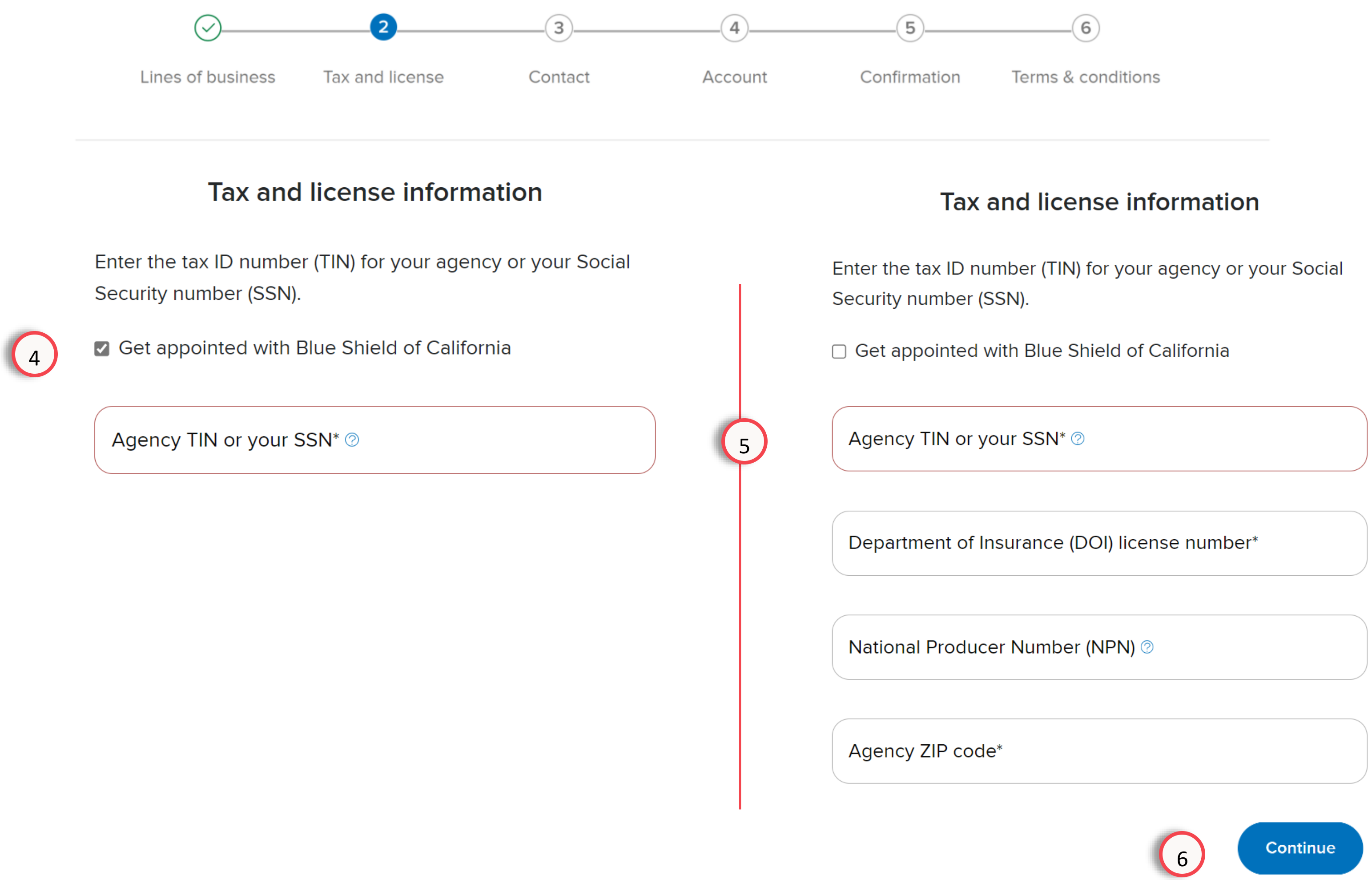
You'll see an indication bar, along the top, to let you know where you are in the process.

2. **Select the lines of business** that you sell.

   At minimum, you'll need to select one, and you can select multiple lines, if you sell different lines of business.

3. Click the **Continue** button to move to the next step.

Register for Broker Connection



Registration Steps

4. Select "**Get appointed with Blues Shield of California**" option.

   If you are already appointed, deselect the checkbox to continue.

5. Complete the **Tax** and **License information**. Required fields are marked with an asterisk (*).

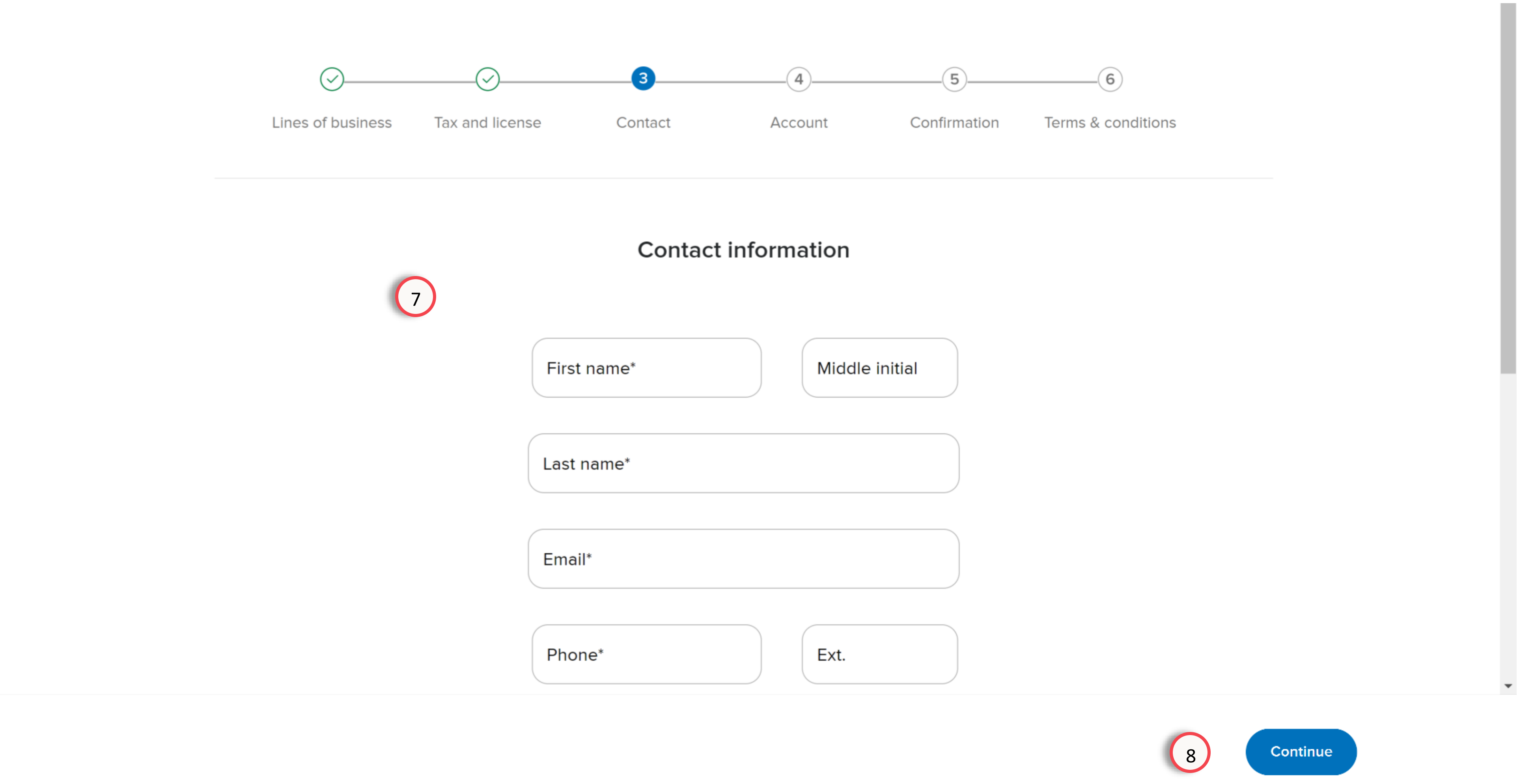
6. Click the **Continue** button to move to the next step.

Note:

As a security feature, the system will validate the information with our systems.

If the information does not match what we have on file, you will not be able to proceed.

Register for Broker Connection

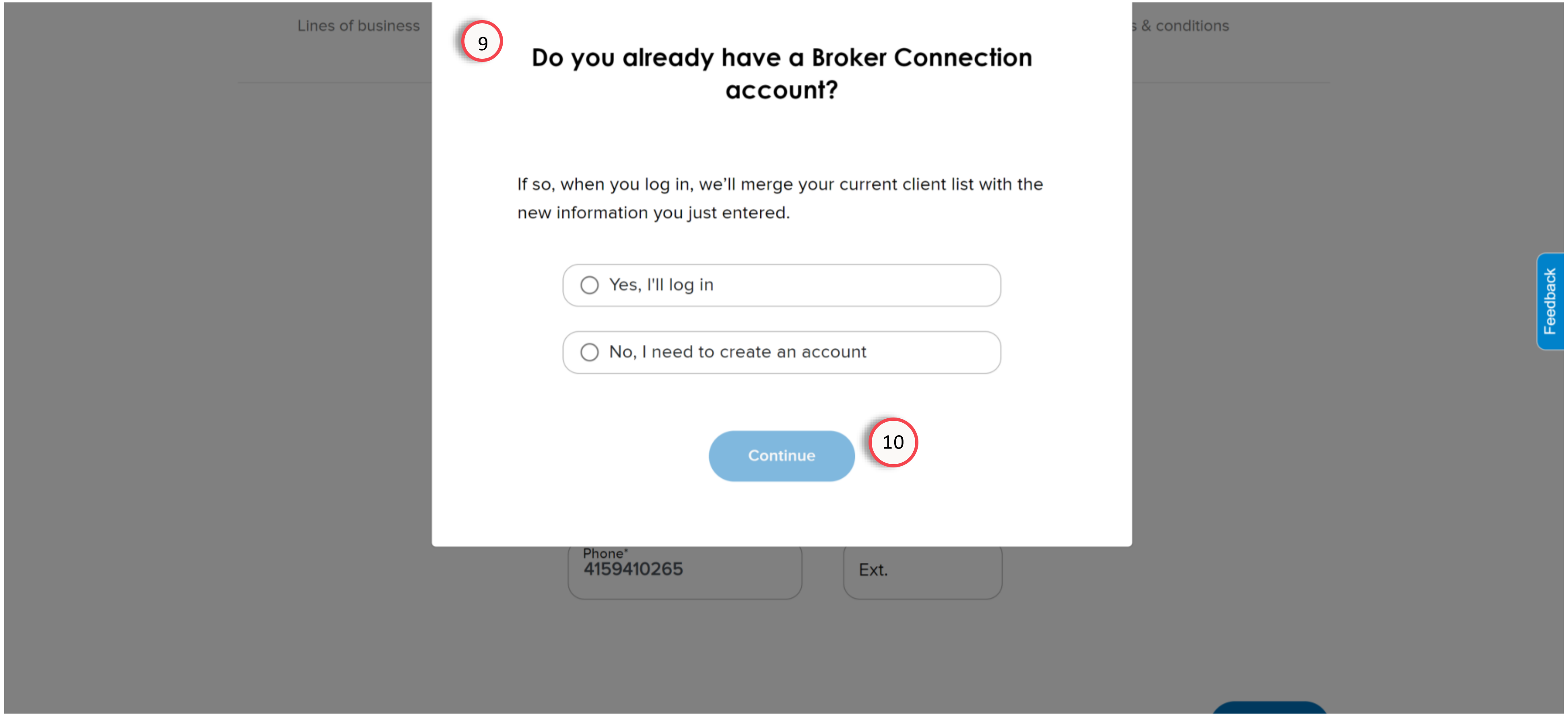


Registration Steps

7. Complete the **Contact information**. Required fields are marked with an asterisk (*).

8. Click the **Continue** button to move to the next step.

Register for Broker Connection



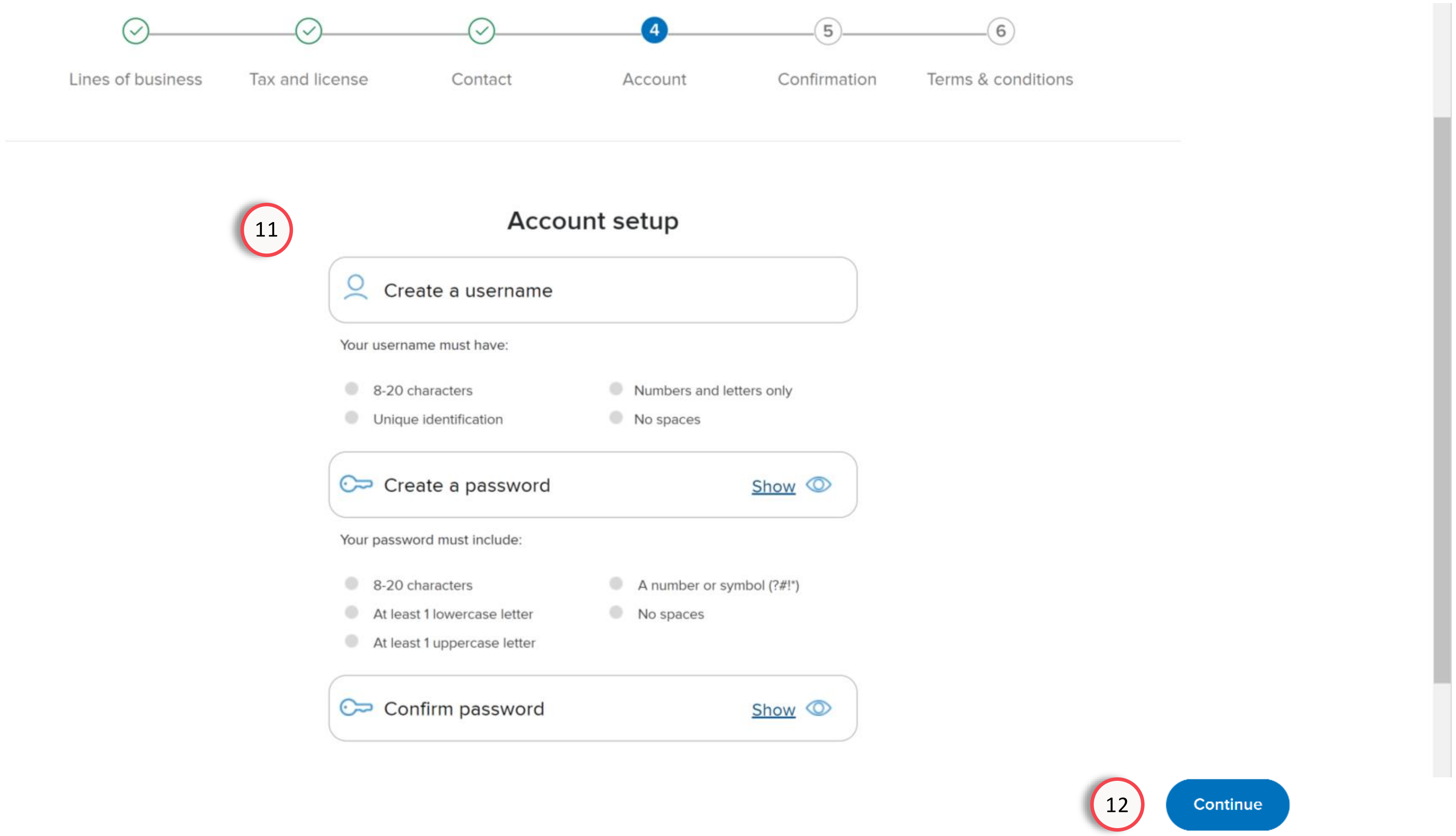
Registration Steps

A pop-up window will appear asking if you have a broker connection account.

If you have a Broker Connection account, your current client list with new information you just entered will be merged.

9. For the question, **select a response**.
10. Click the **Continue** button to move to the next step.

Register for Broker Connection



Registration Steps

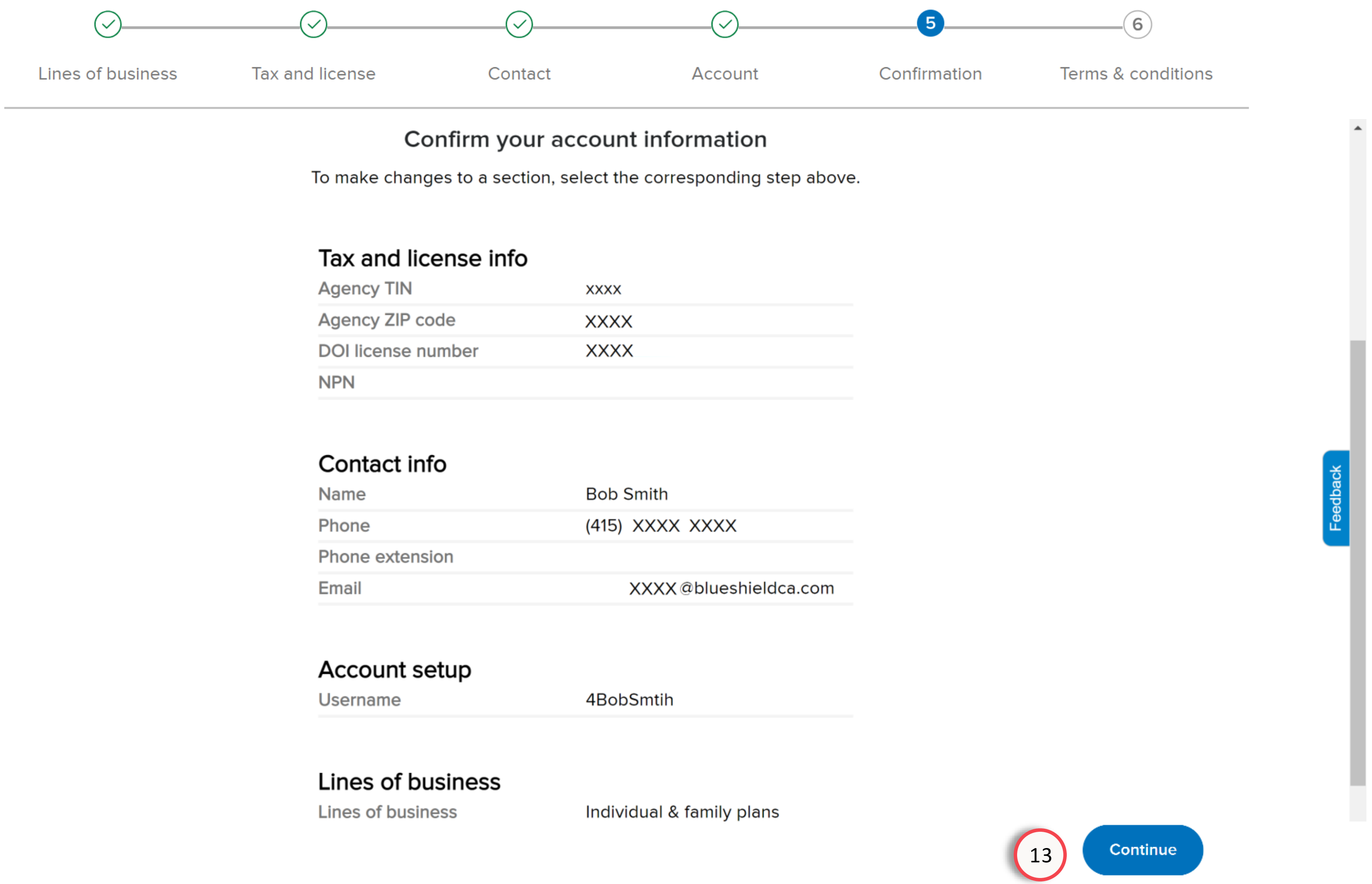
If you selected no to the question, you will be prompted to create a username and password.

11. Create a **username and password**.

    Guidance is provided below the field to ensure that you have a unique and secure ID and password.

12. Click the **Continue** button to move to the next step.

Register for Broker Connection

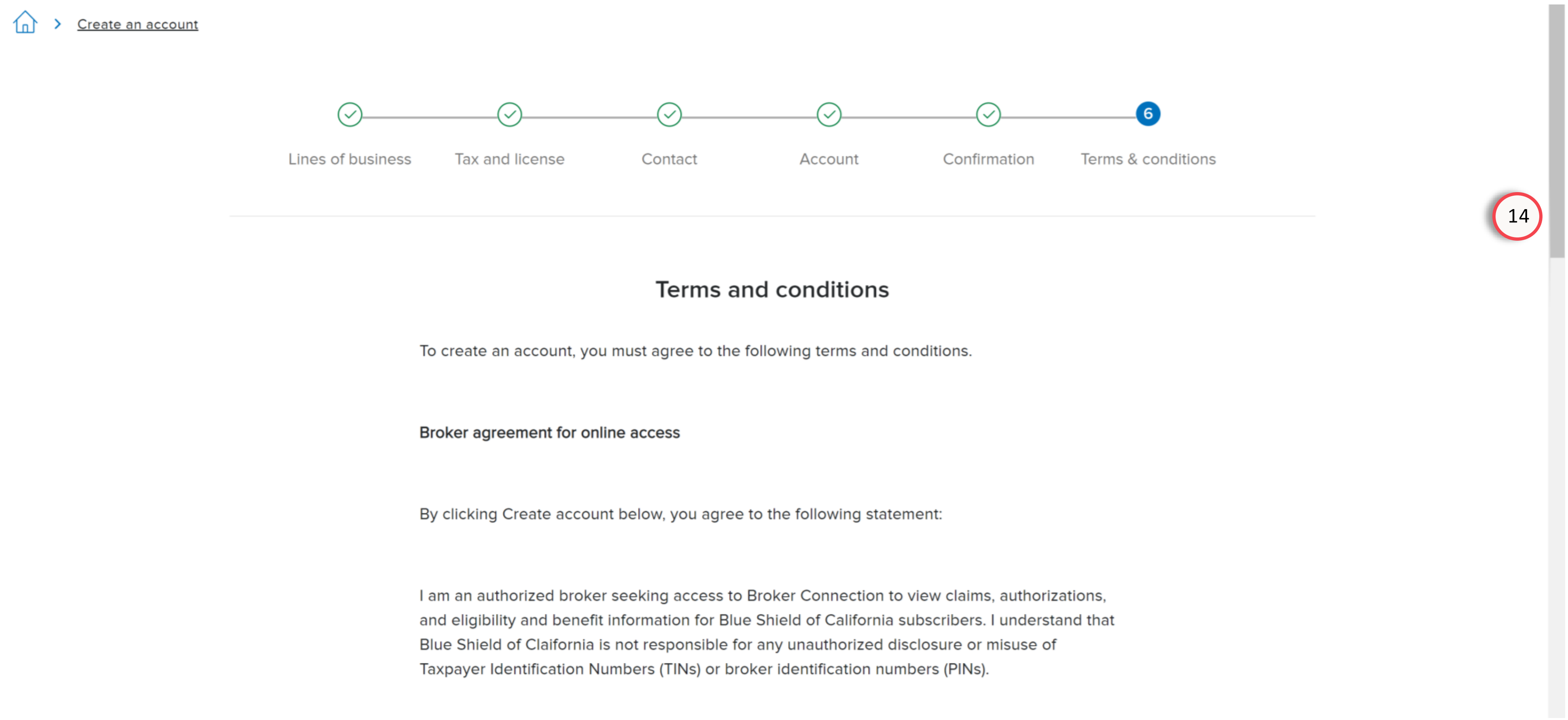


Registration Steps

Confirm the account information. If there are any errors, please use the back button to make edits.

13. Click the **Continue** button to move to the next step.

Register for Broker Connection



Create an account

Lines of business | Tax and license | Contact | Account | Confirmation | 6 Terms & conditions

14

Terms and conditions

To create an account, you must agree to the following terms and conditions.

Broker agreement for online access

By clicking Create account below, you agree to the following statement:

I am an authorized broker seeking access to Broker Connection to view claims, authorizations, and eligibility and benefit information for Blue Shield of California subscribers. I understand that Blue Shield of Claifornia is not responsible for any unauthorized disclosure or misuse of Taxpayer Identification Numbers (TINs) or broker identification numbers (PINs).

Registration Steps

Review **Terms and Conditions** information.

14. Scroll down the page to agree to the terms and conditions.

Register for Broker Connection

I understand that an account manager's role is to:

- Keep my organization's account information up-to-date
- Set up other users within my organization
- Supply forgotten usernames and passwords for other users
- Place a user account on inactive status (e.g., for a leave of absence)
- Manage the TINs and PINs associated with my organization (no period)

Blue Shield is not responsible for any unauthorized disclosure or misuse of TINs or PINs.

For security reasons, multiple users may not share login information. Doing so will constitute a violation of state and federal regulations and could place sensitive member data at risk.

Enter your full name and today's date to agree to our terms and conditions.

Enter your full name

Select today's date

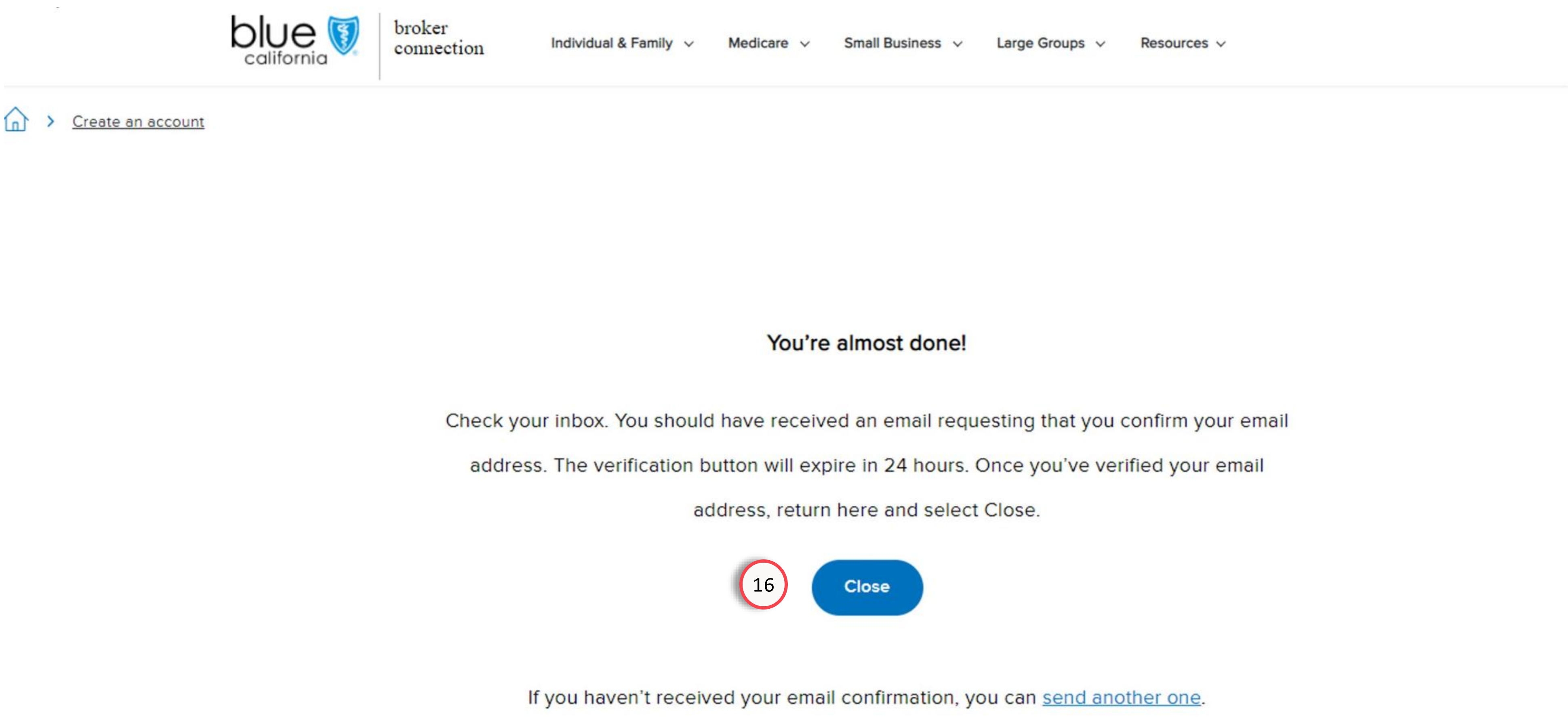
15 Continue

Registration Steps

For your digital signature, **enter your full name, and select today's date**.

15. To complete your registration, click the **Continue** button.

Register for Broker Connection



Registration Steps

Check your inbox for an email, requesting confirmation of your email address.

If you haven't received your email confirmation within a few minutes, you can click the link to send another verification.

16. Click the **Close** button.

Register for Broker Connection

Activate your Broker Connection account

blue california | Broker Connection

Thank you for registering with Broker Connection

First Name: Bob
Last Name: Smith
Agency:
User name: 4BobSmith

Once you verify your email address, you can log in with your user name and password. This link will expire in 24 hours after you signed the Terms and Conditions.

Verify Email 17

Follow Blue Shield

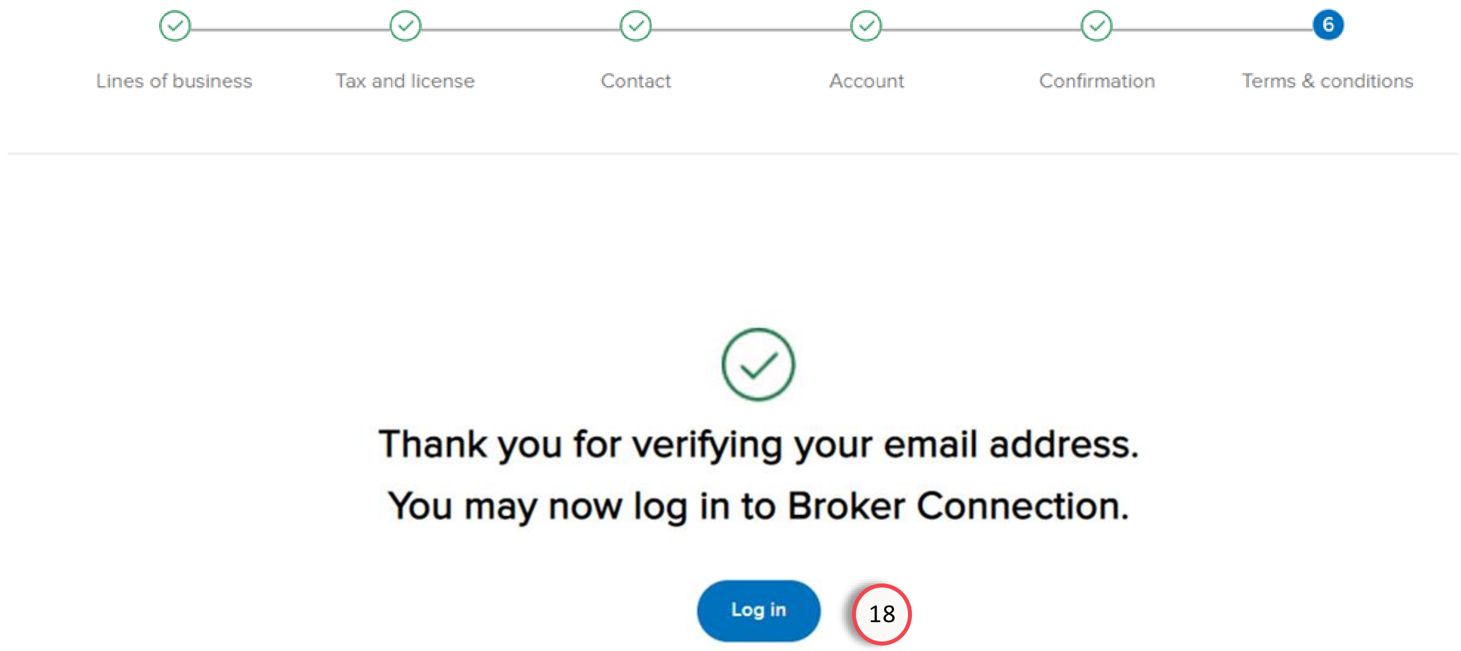
Registration Steps

The Verification button within the email will expire in 24 hours.

Check your email inbox for the "**Activate your Broker Connection account**" email.

17. To complete the account creation process, **click the Verification button.**

Register for Broker Connection

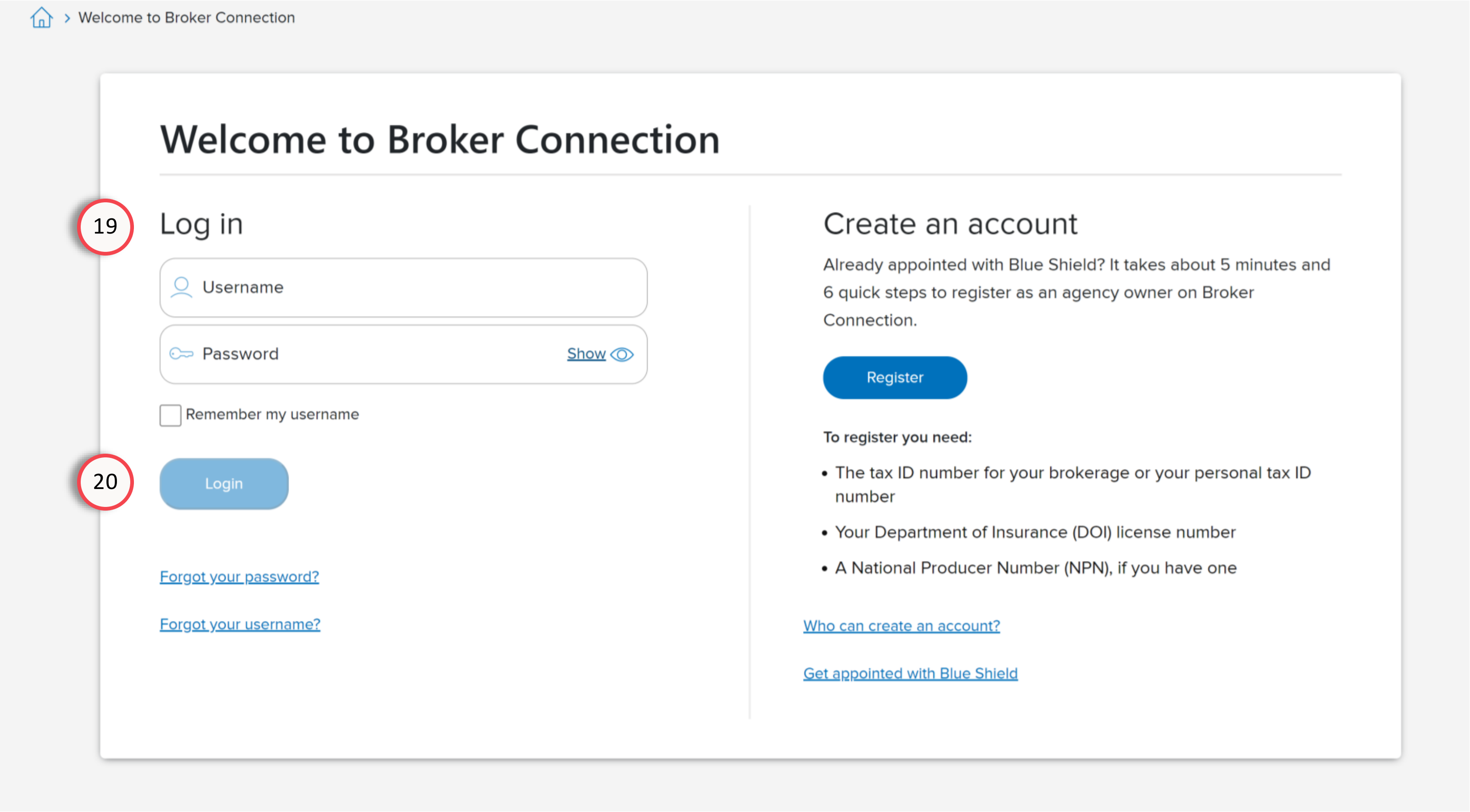


Registration Steps

After verifying your email address, you will see a confirmation screen indicating that you have successfully created an account.

18. To access your new Broker Connection account, **click the Log in button**.

Broker Connection



Log in

19. On the left side of the screen; **enter your username and password.**

20. **Click the log in button.**

Important

Your login information will remain the same as you complete the application process and become appointed with Blue Shield.

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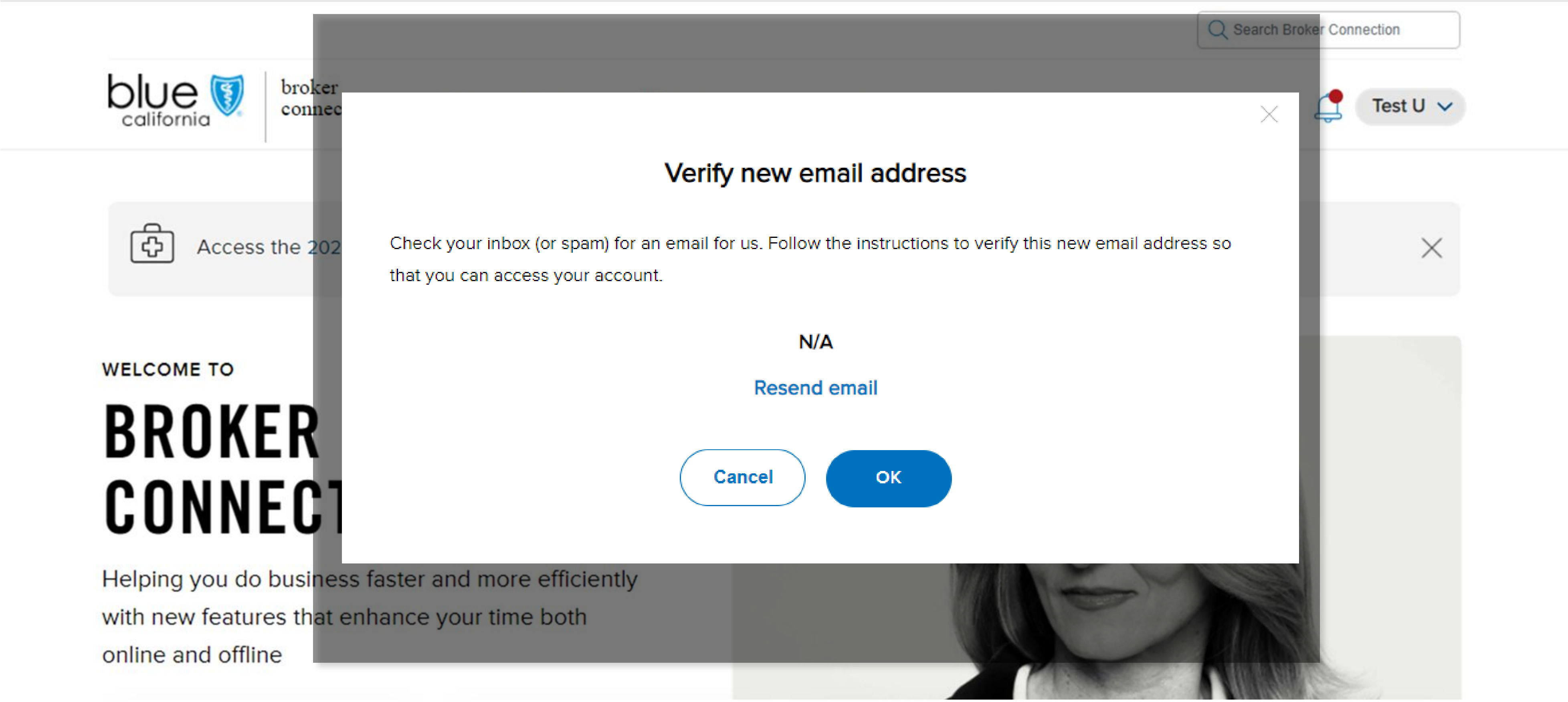
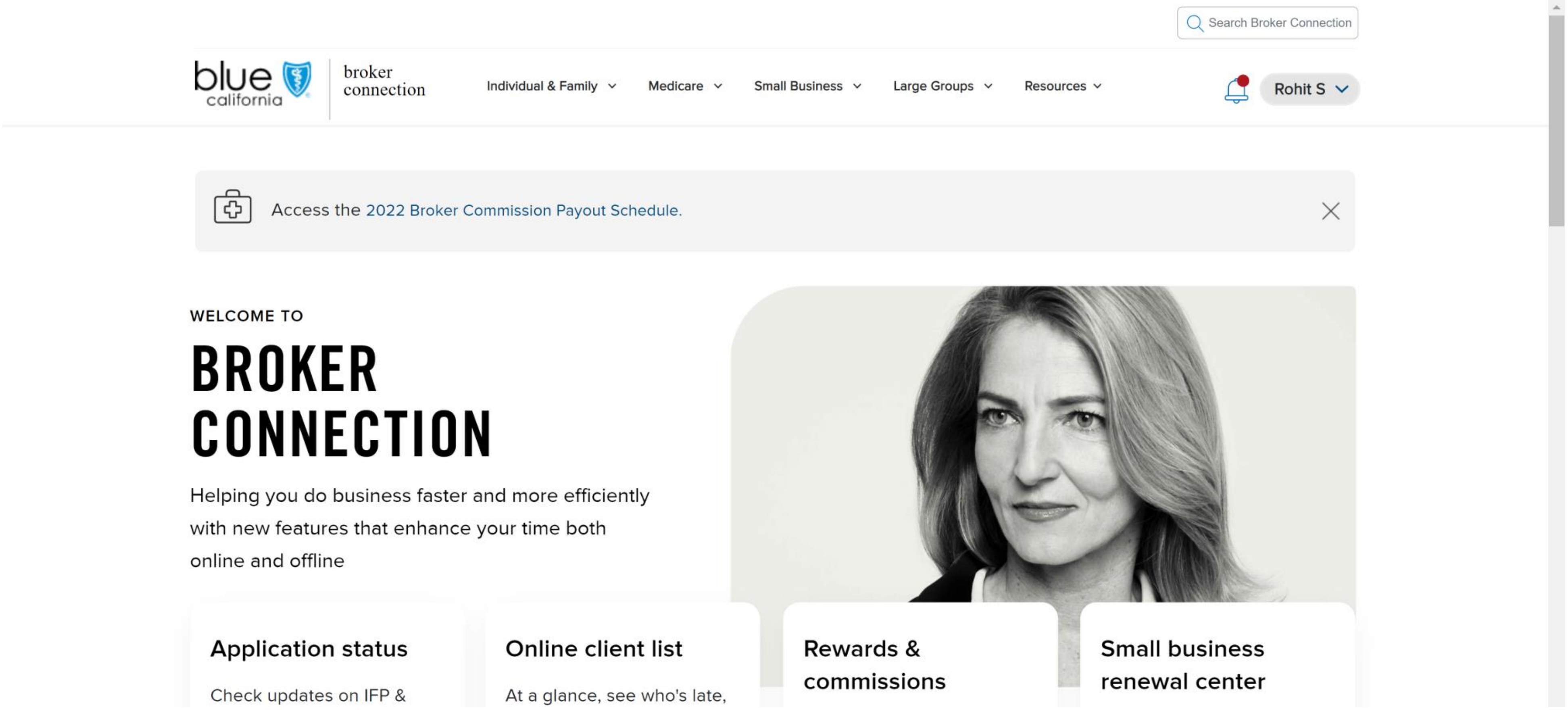
Register for Broker Connection



Registration Steps

If you log in for the first time and have not verified your email address, you will receive a reminder.

Broker Connection



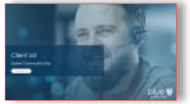
Authenticated Home Page

You are now logged into Broker Connection.

From the home page you can use the navigation tools to access various sections to help manage your book of business including:

- **App Status**

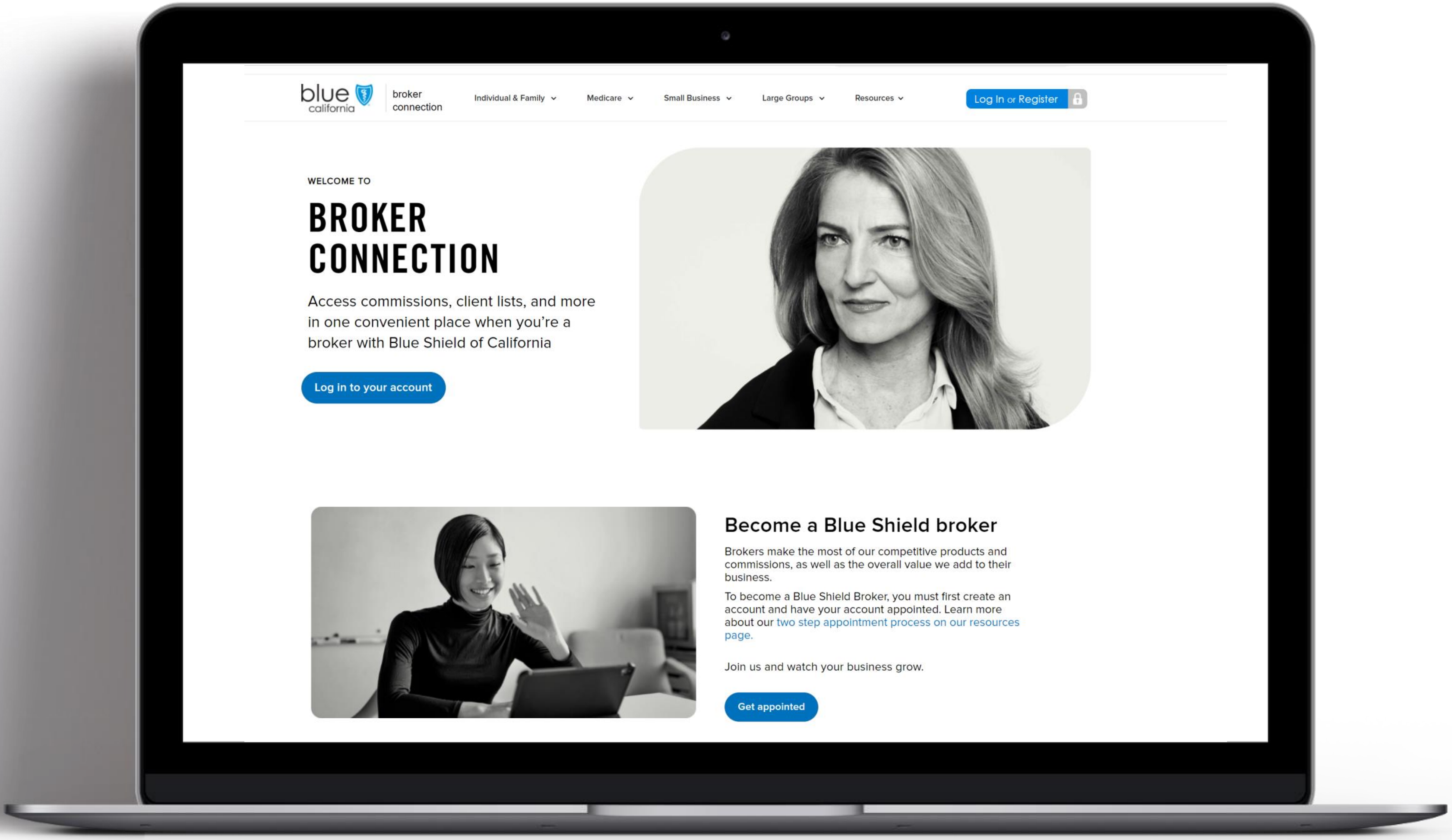
- **Online Client List**



- **Shield on Demand**

- **Commission Statements**

2- Step Verification



2- Step Verification

Overview

Blue Shield of California is proactively enhancing data security by implementing 2-Step Verification for all external portals. This is additional layer of protection requires users to verify their identity through a personalized code, reducing unauthorized access and potential data breaches. The move aligns with Security Compliance requirements, offering more secure online interactions and better safeguarding sensitive information against compromised passwords.

Important

2-Step Verification is unique to the individual. Each person within your organization, agency, or company who needs access must register for an account on Broker or Employer Connection.

Key Points

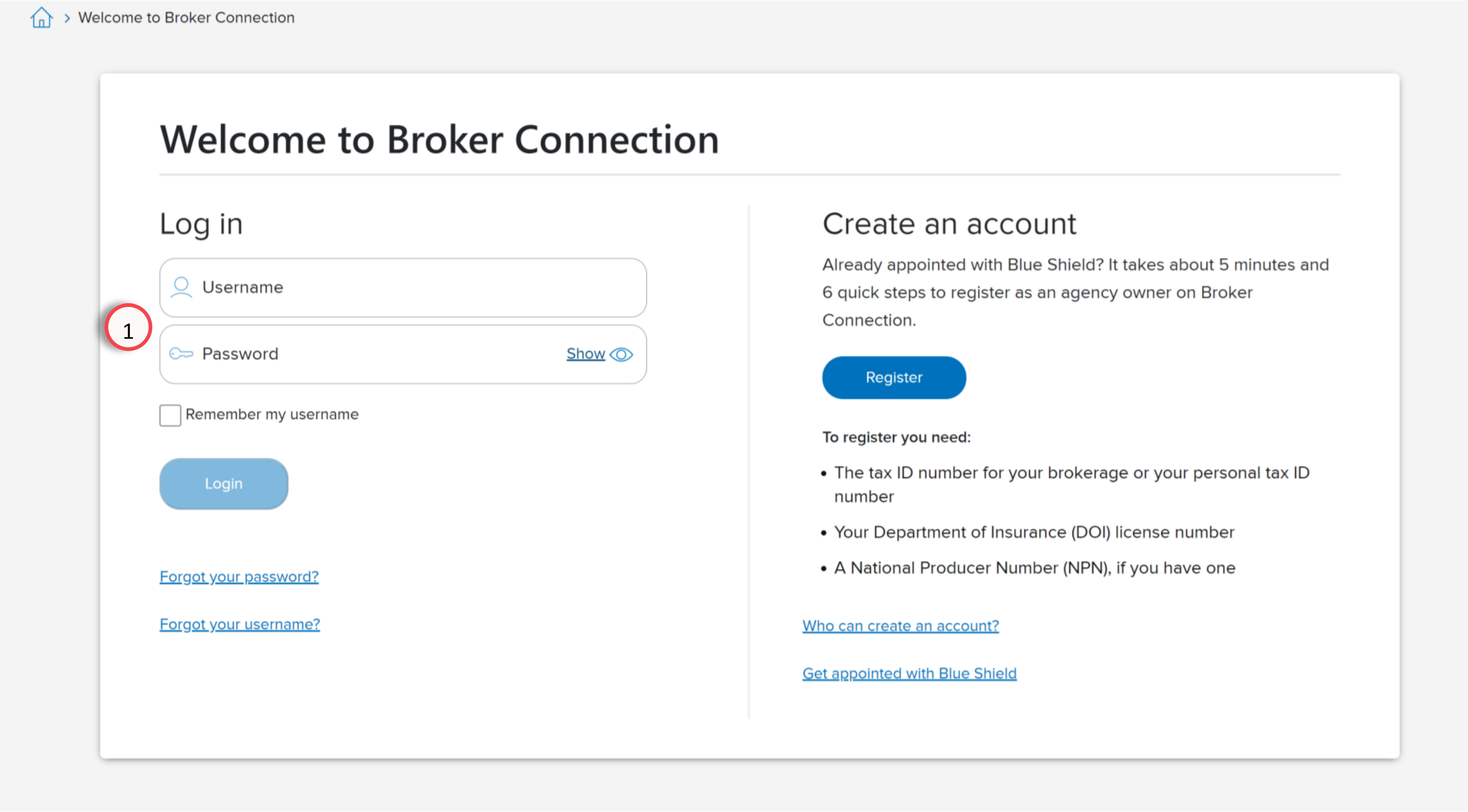
1. You cannot bypass the 2-Step Verification.
2. You'll need real-time access to the email inbox of the email address on file in your online profile.
3. You must enter a new 6-digitcode each time you login or after an extended period (4 hours) of inactivity.
4. The 2-Step Verification code is sent to the registered email in your online Broker Portal profile.
5. If you enter an incorrect code three times, your account will be automatically locked for 10 minutes. You can attempt your login after the 10-minute wait period.

Any issues with the 2-Step Verification, please contact Blue Shield Producer Services.

Phone Number:

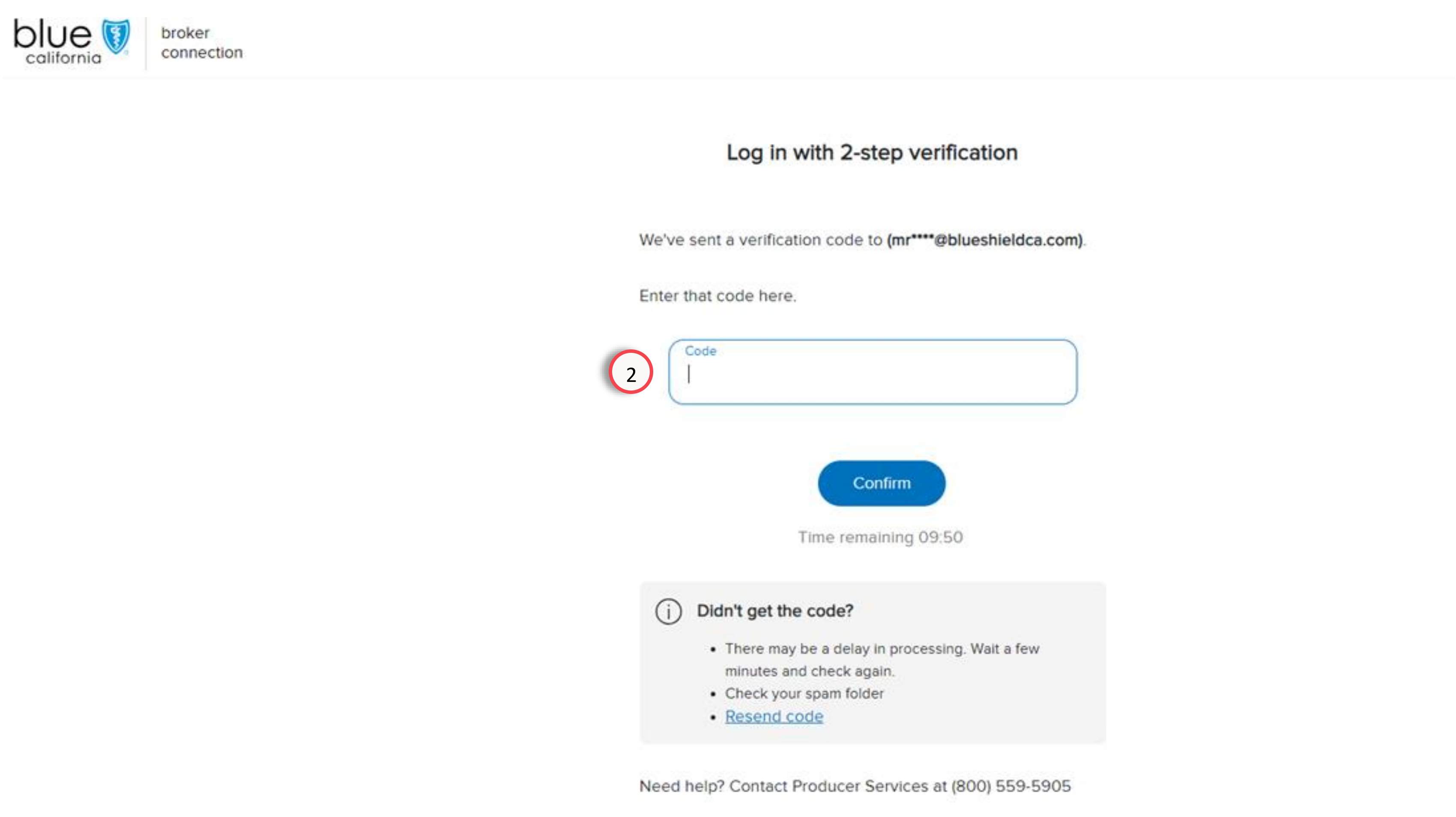
1-800-559-5905

Completing a 2-Step Verification



1. Enter your **Username and Password** information and **click the Login button**.

Completing a 2-Step Verification



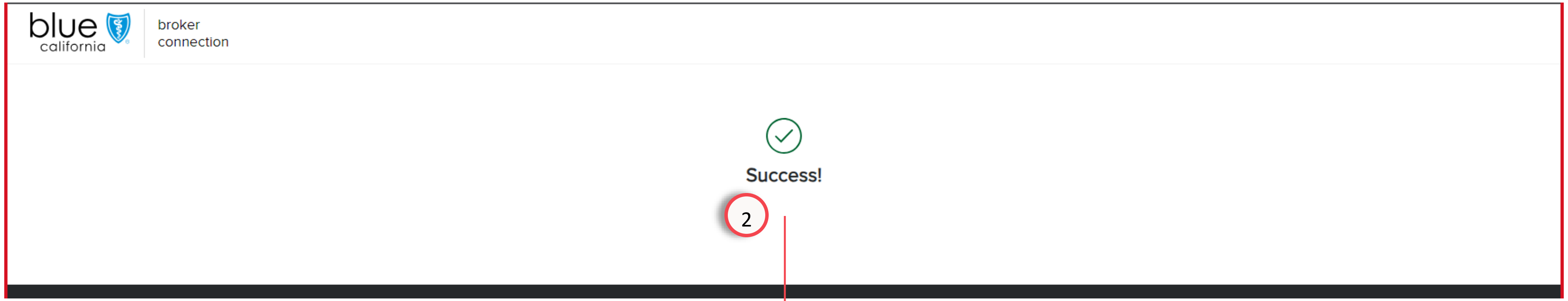
A one-time passcode is sent to your email address.

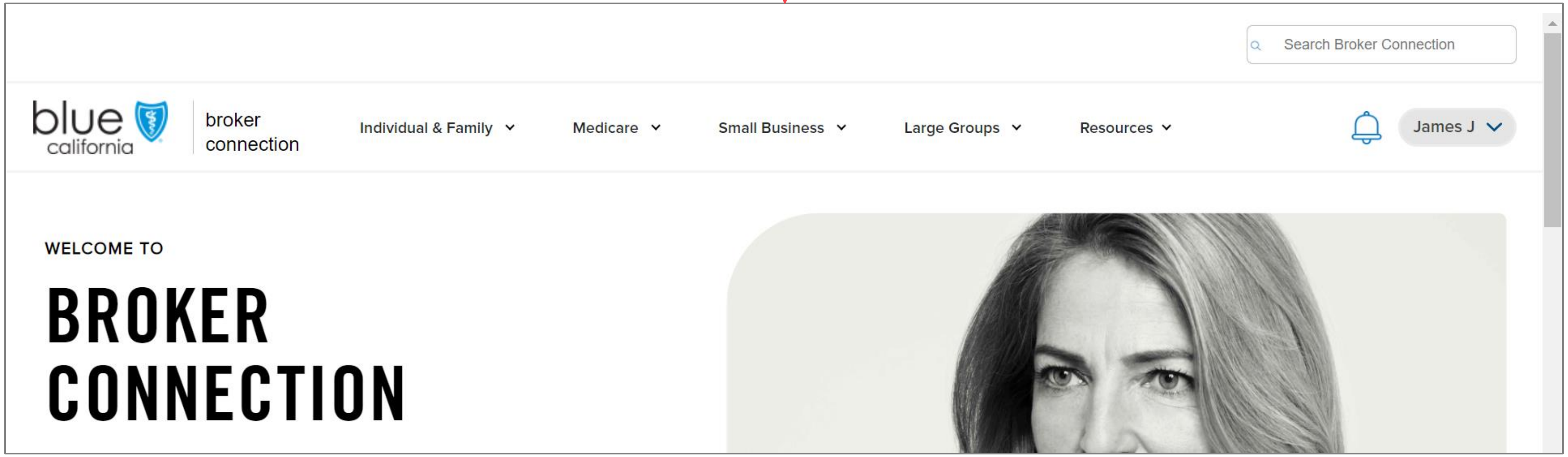
You have 10 minutes to enter that code before it expires.

If you need to have the code sent again, click the **Resend Code link** at the bottom of the page.

2. Enter the code and click **Confirm**.

Completing a 2-Step Verification





2. After success message is displayed, you are automatically taken to the Broker Connection home page.

Primary Agents & Agency Owners

Account Management Tool

View Section

Introducing Broker Connection Account Management Tool

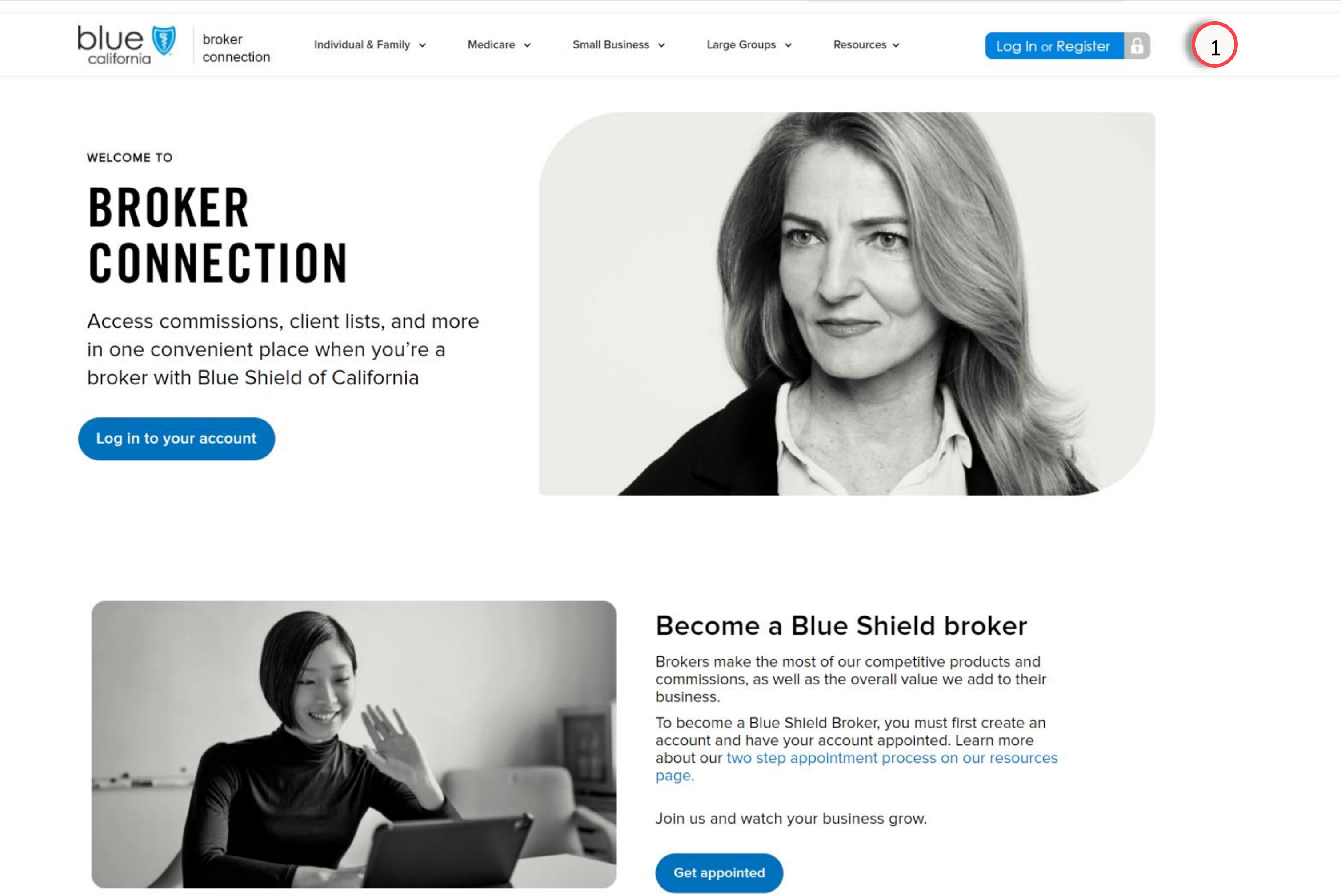
Primary agents and agency owners will have administrative control for their account access to Broker Connection using the new "Account Management Tool" features.

Primary agents already appointed with Blue Shield of California will be able to create and manage new user accounts on broker connection with access to all its tools and resources.

Role-based Permissions

User account functionality is determined by role-based permissions and easily set or changed anytime by your designated primary agent.

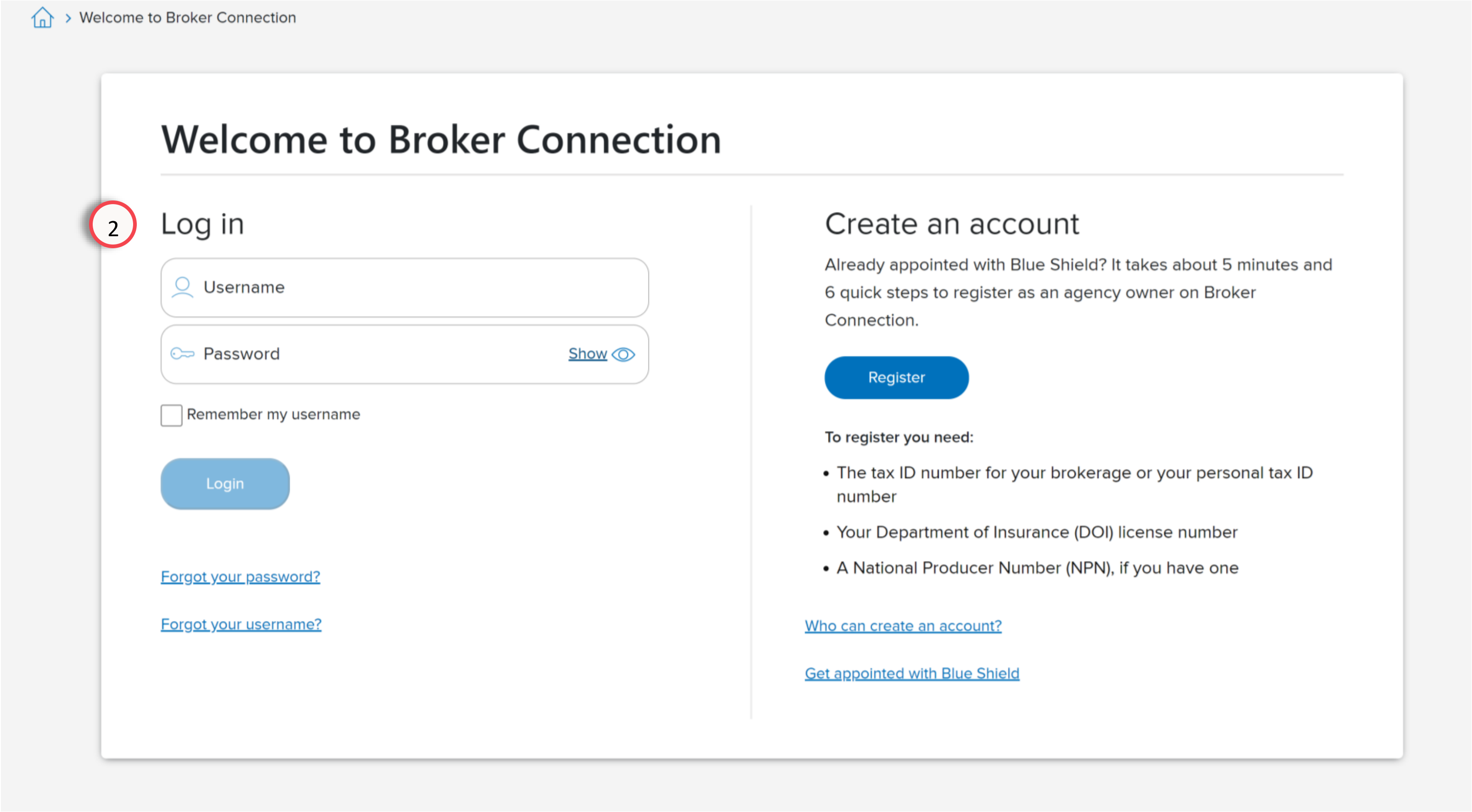
Register and Log In



Register

1. Click the **Log in or Register** button at the top right of the page.

Register and Log In



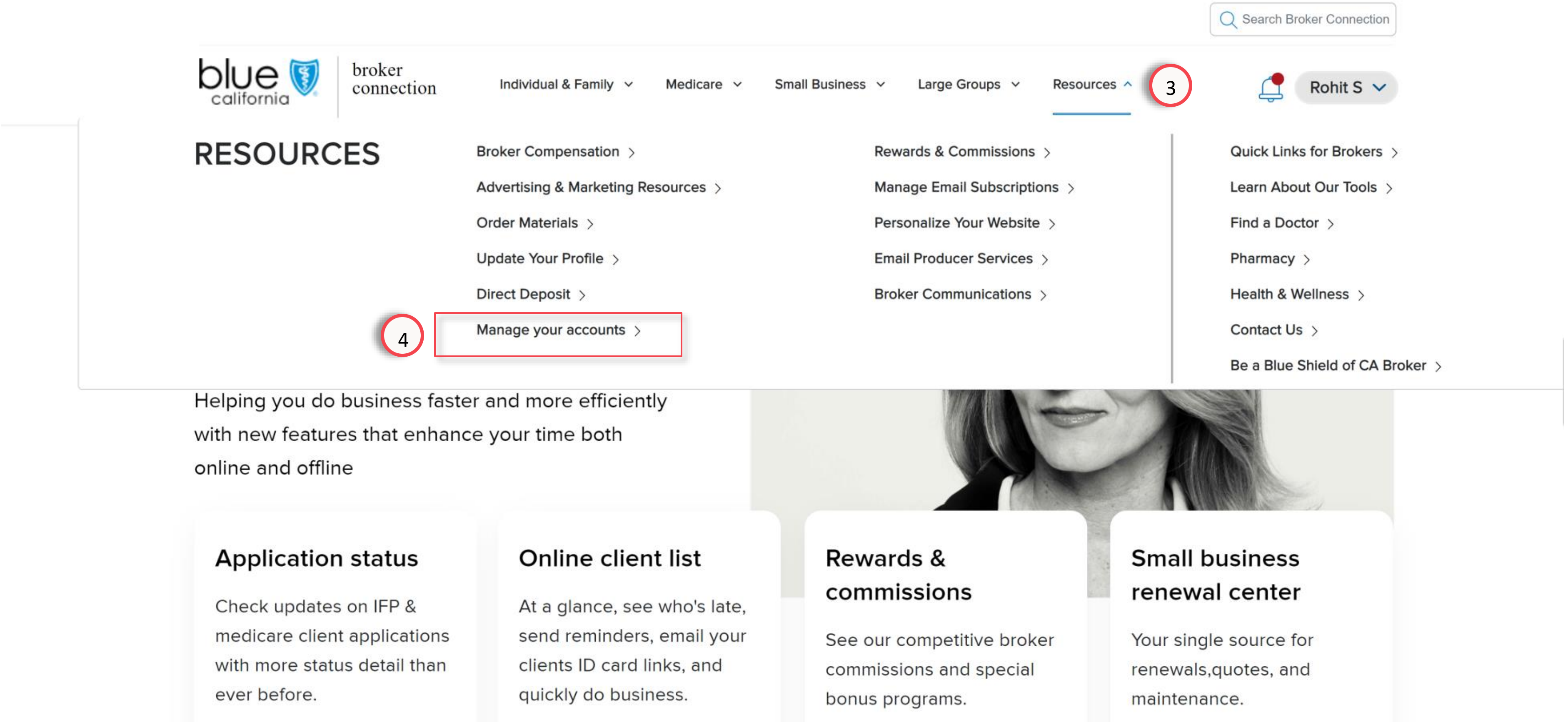
Registration Steps

2. Enter your **Log In** information and **click the Continue button**.

Note:

This section provides steps for the Primary Agent to perform a secondary registration process for endorsed agents for their agency.

Broker Connection



Resources Menu

Under the resources tab you'll see a new option for manage your accounts.

3. Click the **Resources Tab** to view the menu.
4. Select **Manage your accounts** from the menu options.

Note:

You must sign-in to your Primary Agent or Administrator account to access this menu option.

Other role-based profiles (i.e., sales agent, sub agent) will not display this option in the menu.

Account Management

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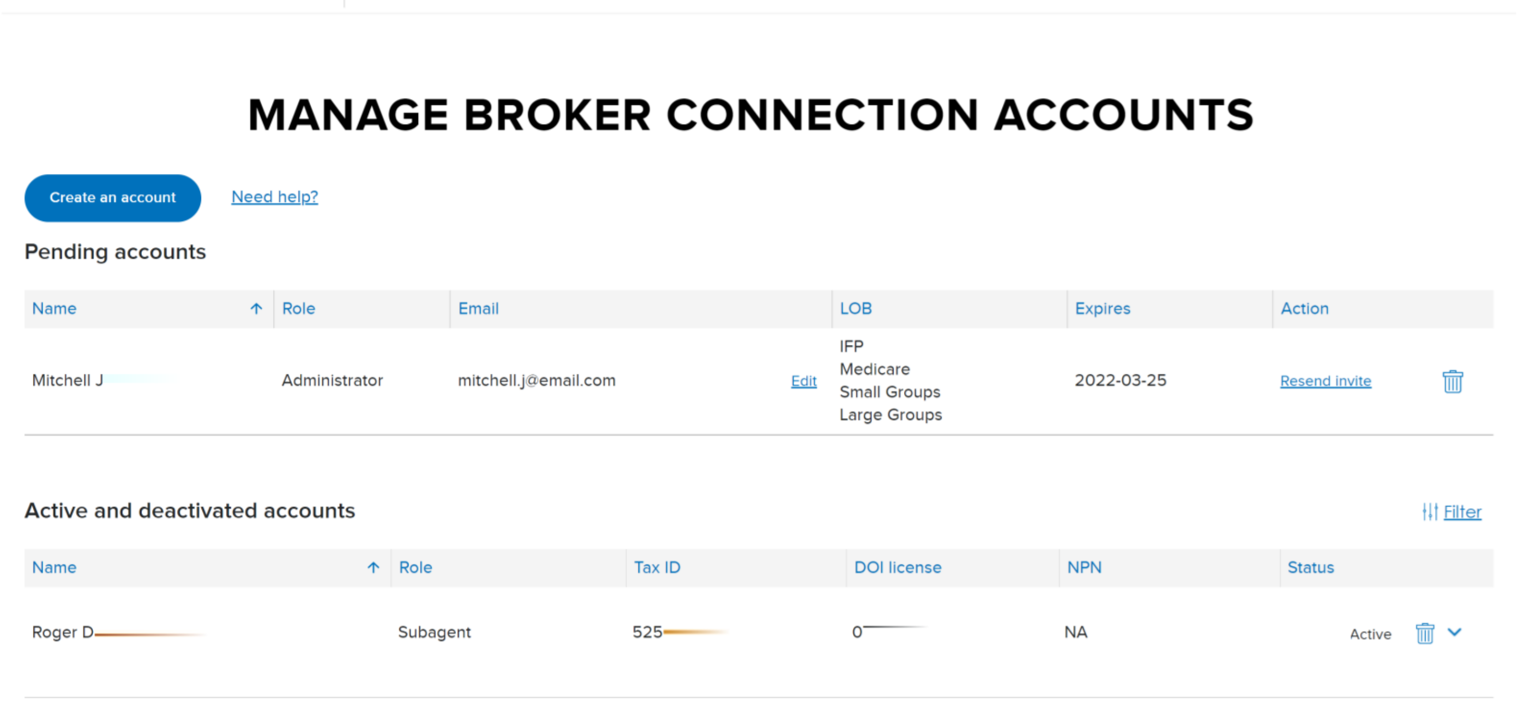


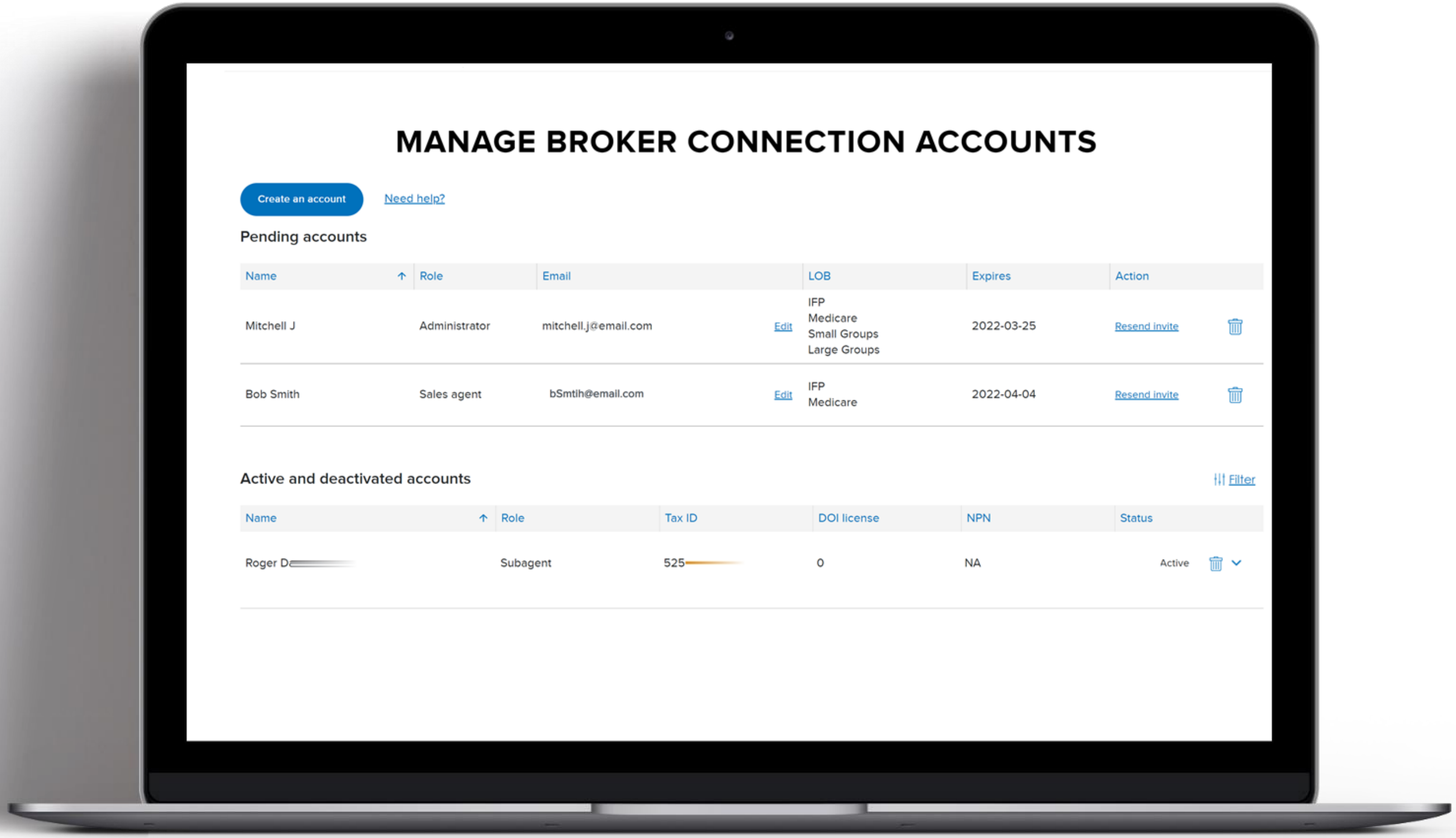
Registration Steps

The Broker Connection Accounts page displays all the accounts for your agency.

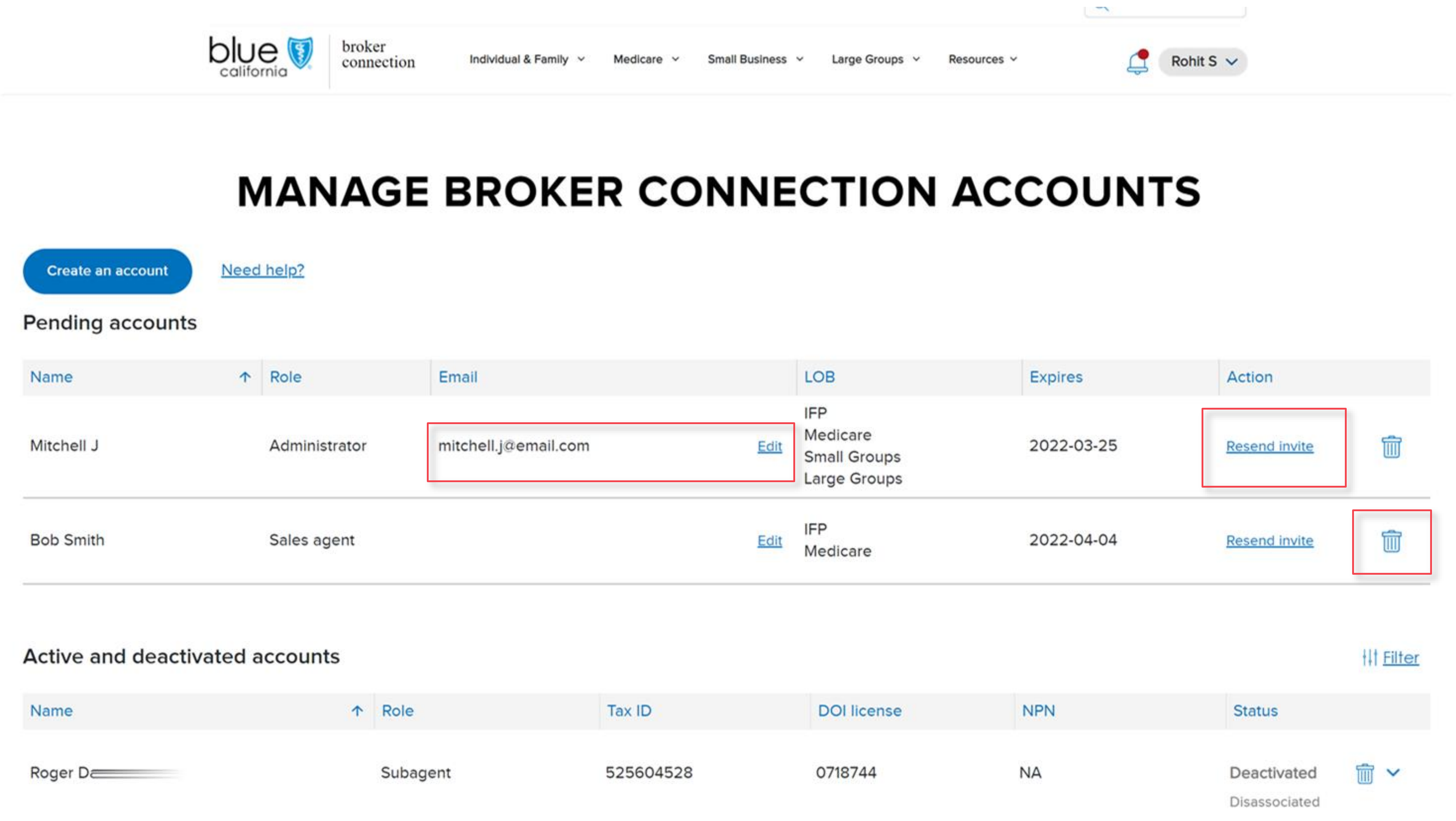
5. At the top of the page, is the Pending Accounts section, which are accounts that were newly invited to register.

6. And at the bottom of the page, there the active and deactivated accounts.

Managing Accounts



Managing Accounts: Pending Accounts



Pending Accounts

Pending Accounts are technically not active.

Therefore, the only field that's editable is the email address field. You can update the email and resend the invite.

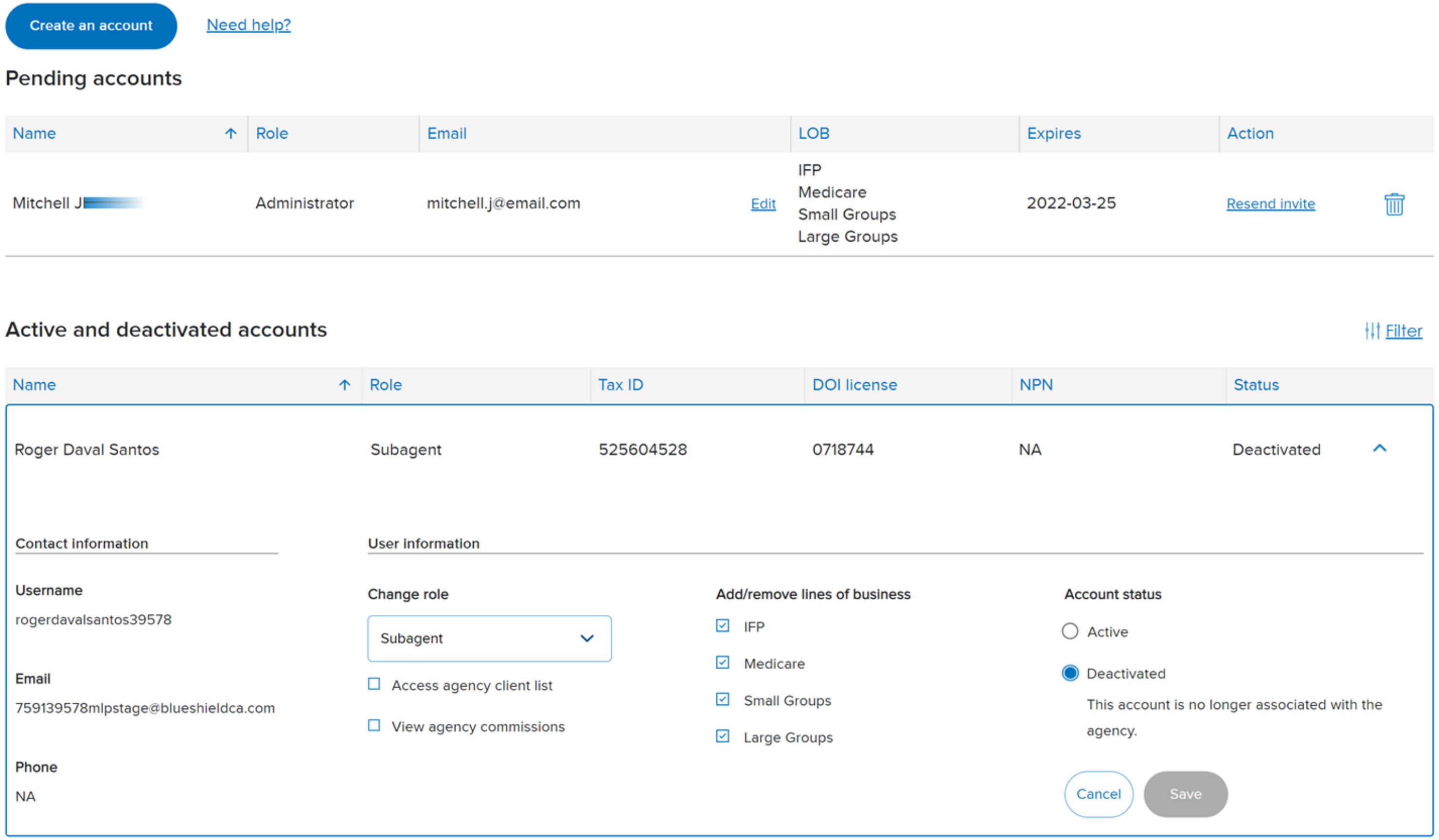
You also have the option to delete the pending account by click on the trash icon.

Note:

If the user did not respond within the first seven days, you can resend the invite.

Resending the invite will provide another seven days before it expires again.

Managing Accounts: Active and Deactivated Accounts



Active & Deactivated Accounts

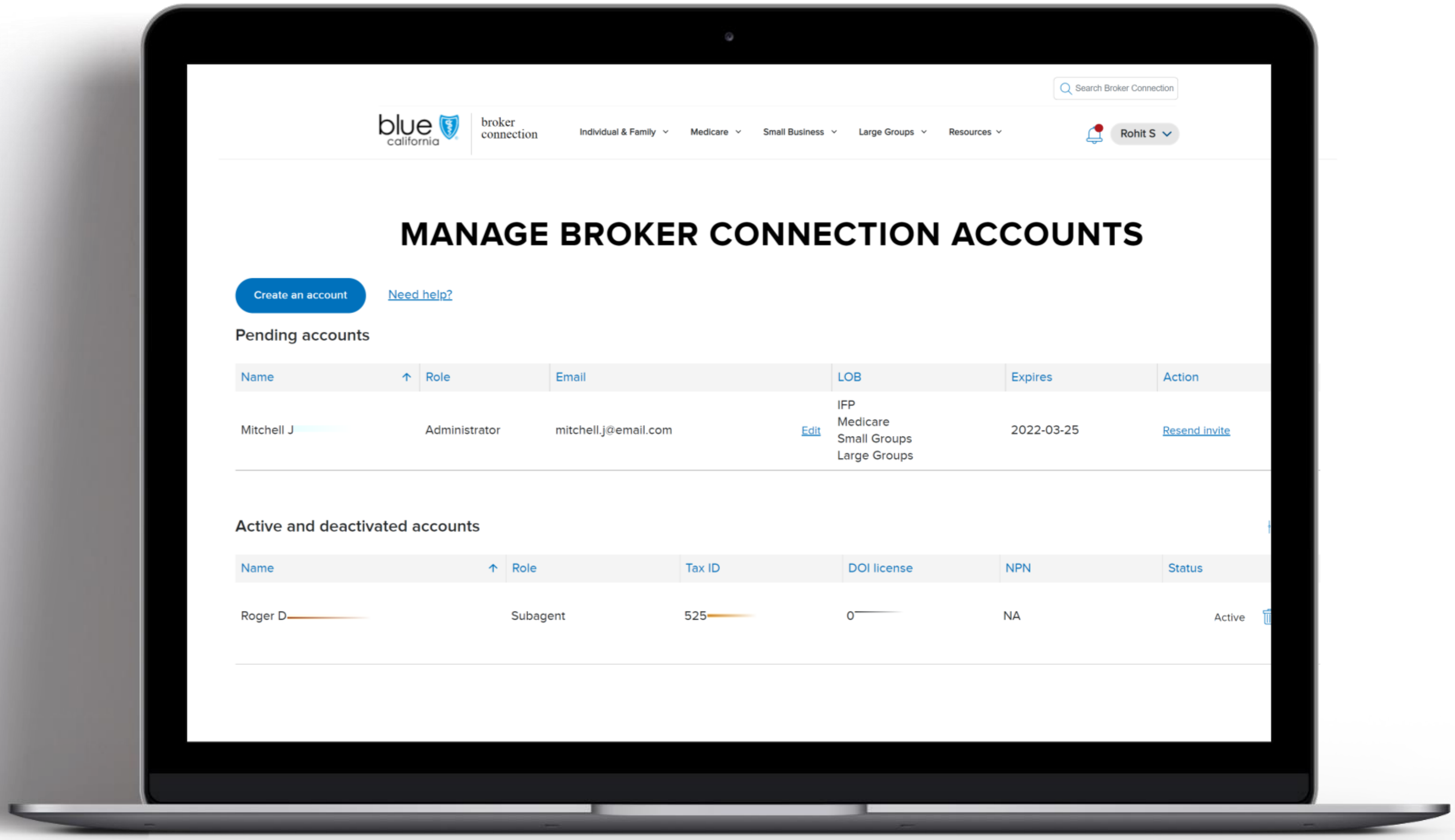
Once the user accepts the invite and creates the account, it will move to Active accounts section.

You can expand each user's information by clicking on the expand arrow on the right side of their information.

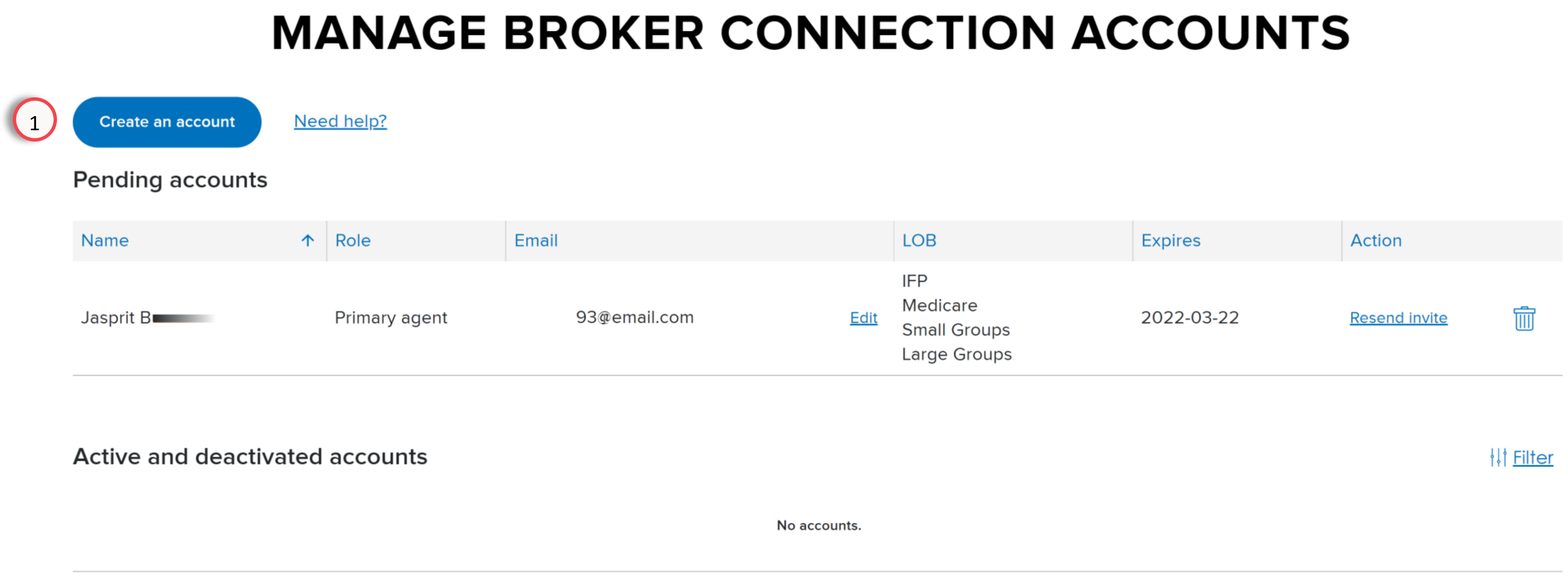
The expanded information now includes the ability to:

- Change the user's role, and if you selected sub-agent, you could turn on or off access to the agency's client list, and commissions.
- Add and remove, the lines of business the person sells.
- Account controls to "dis-associate" the user from the agency.

Creating an Account



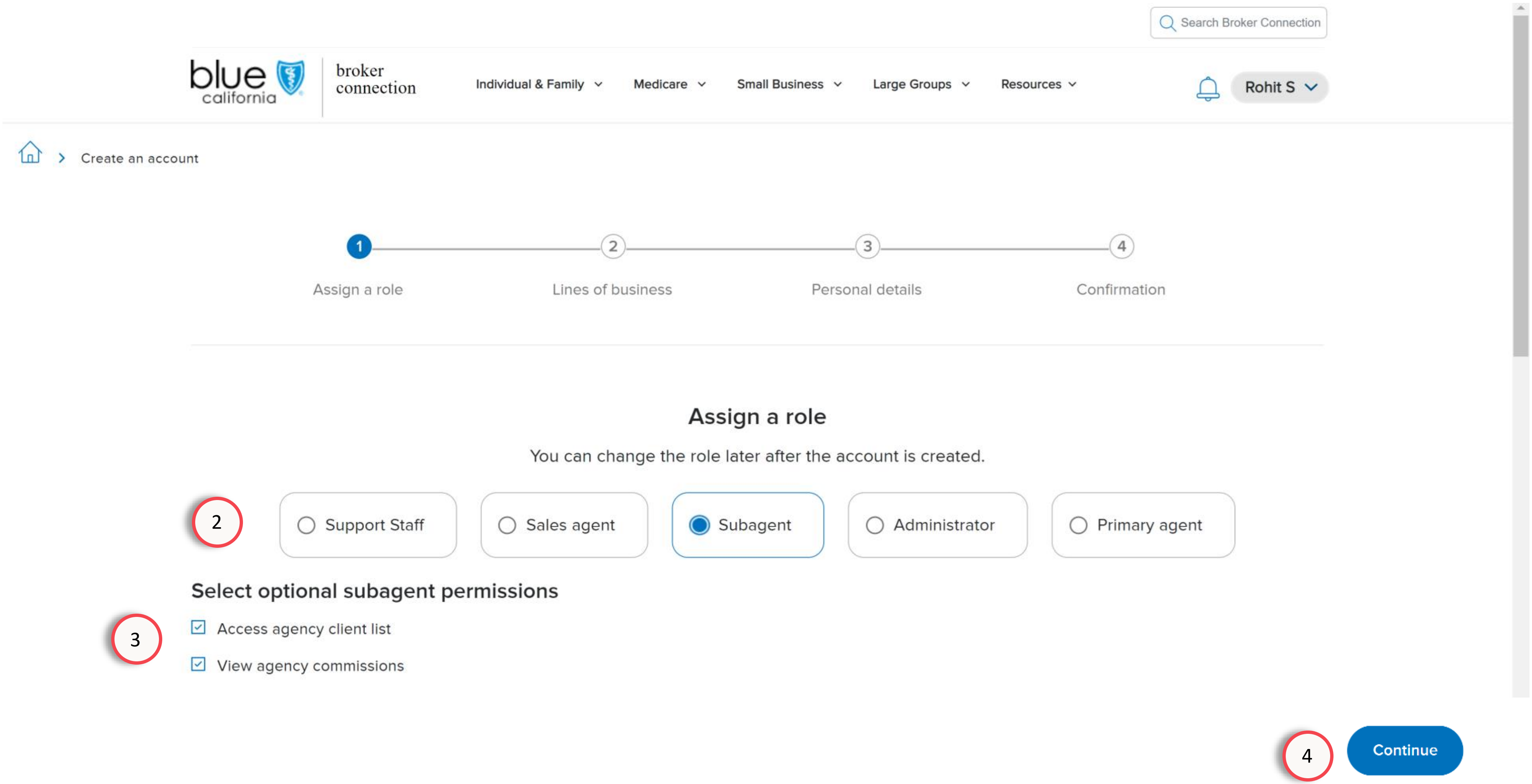
Create an Account



Create an Account

1. Click the **Create an Account** button to invite the user to register for a Broker Connection account associated with your agency.

Create an Account



Create an Account

The primary agent begins a four-step process, and at the top of the page is a progress bar.

2. For the first step, **assign a role**.
3. If Subagent is selected, you can **select optional permissions** to:
   - Access agency client list.
   - View agency commissions.
4. Scroll to the bottom of the page and click **Continue** to move to the next step.

Note:

Subagent is the only role that has optional permissions.

Create an Account

What can each role do?

	Support staff	Sales agent	Subagent	Administrator	Primary agent*
Order sales materials	✓	✓	✓	✓	✓
Use enrollment tools	✓	✓	✓	✓	✓
Access their client list		✓	✓	✓	✓
View their commissions		✓	✓	✓	✓
View application status		✓	✓	✓	✓
Access agency client list			✓ (optional)	✓	✓
View agency commissions			✓ (optional)	✓	✓
Create and manage user accounts				✓	✓
Update agency profile					✓
Change direct deposit details					✓

✓ Optional

*Primary agents can create up to 4 other primary agent accounts.

Roles Defined

Each of the different roles are clearly defined.

There can be up to four primary agents that are assigned per agent.

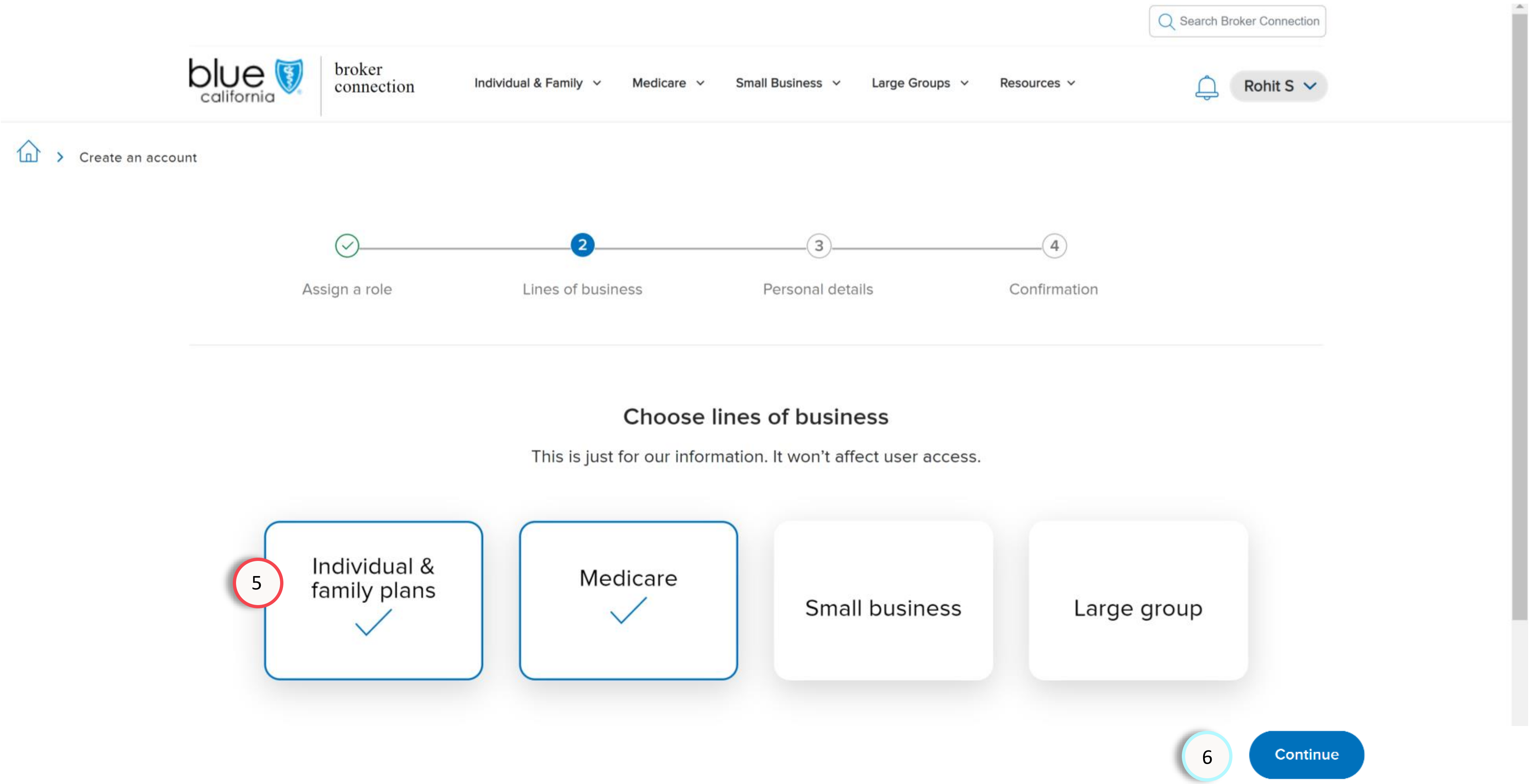
There are no restrictions in terms of how many administrators, subagents, sales agents, or a support staff that can be created.

For the Medicare lines of business, endorsed agents will be fulfilled with the sales agent role.

Subagents technically are applicable for all lines of business.

However, endorsed agents are not appointed with blue shield, and we are requiring users who are set up as a subagent to be appointed with blue shield directly.

Create an Account



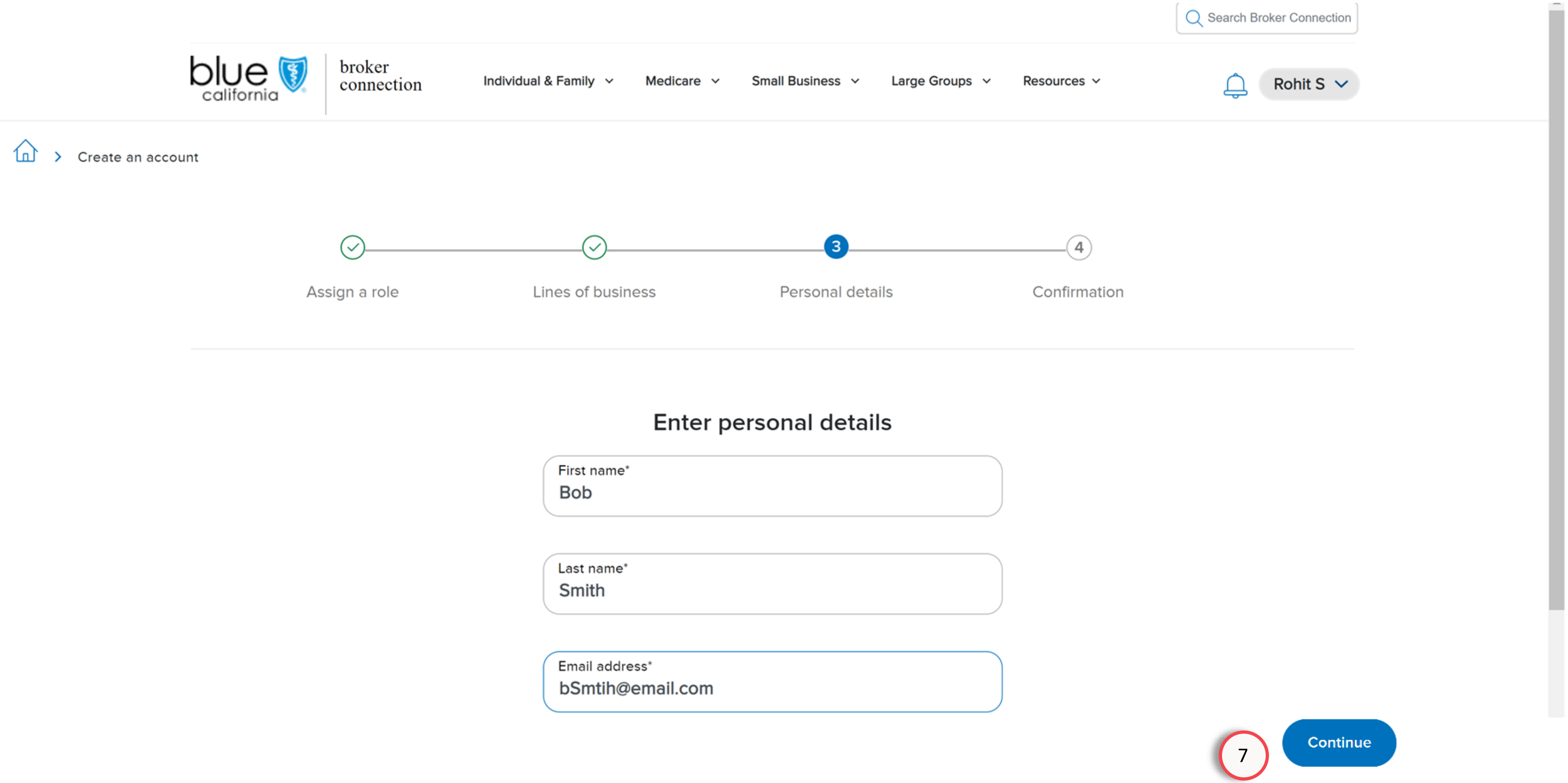
Create an Account

5. Select the lines of business that the user will sell.
6. Click the **Continue** button to move to the next step.

Note:

At least one option must be selected, and you can select as many as you need.

Create an Account

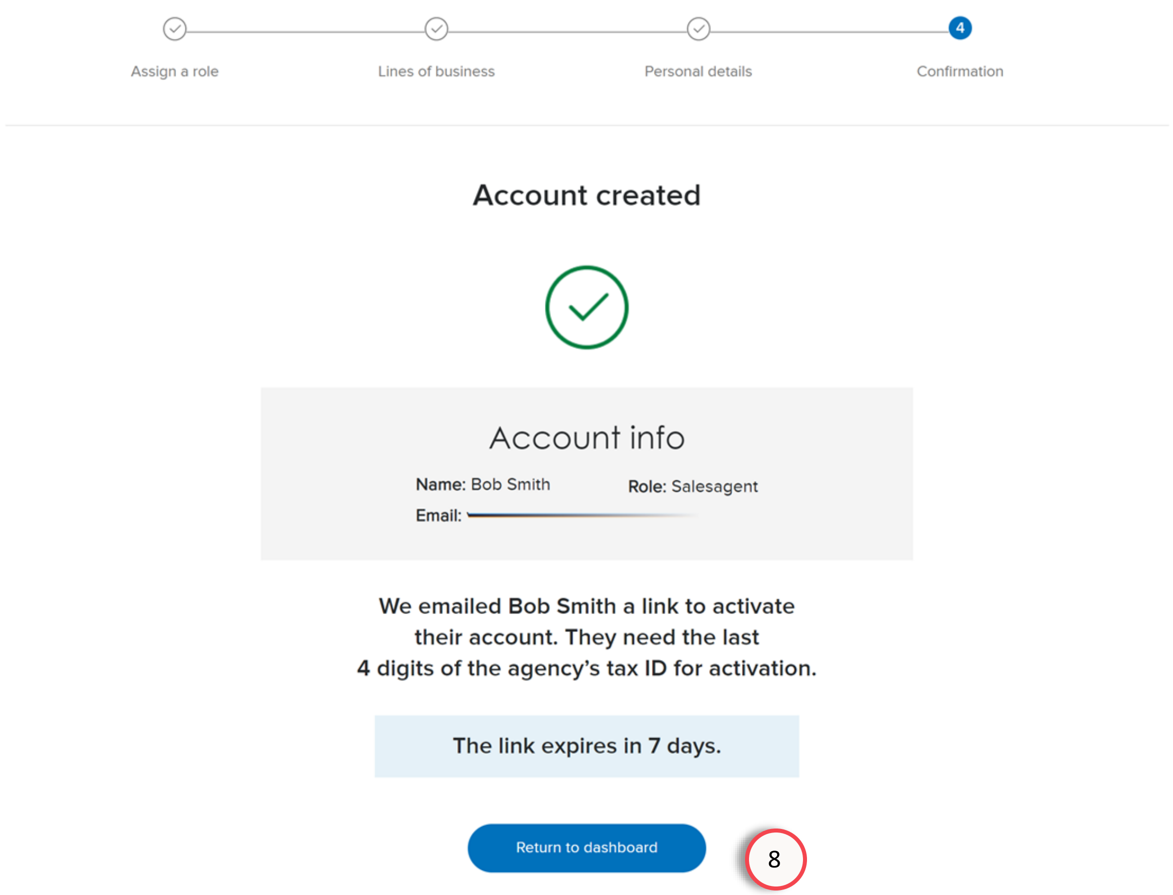


Create an Account

For personal information, we enter only the essential data that's required to trigger the invitation.

7. Enter the **personal details to create the account** and send the invite and click **Continue**.

Create an Account

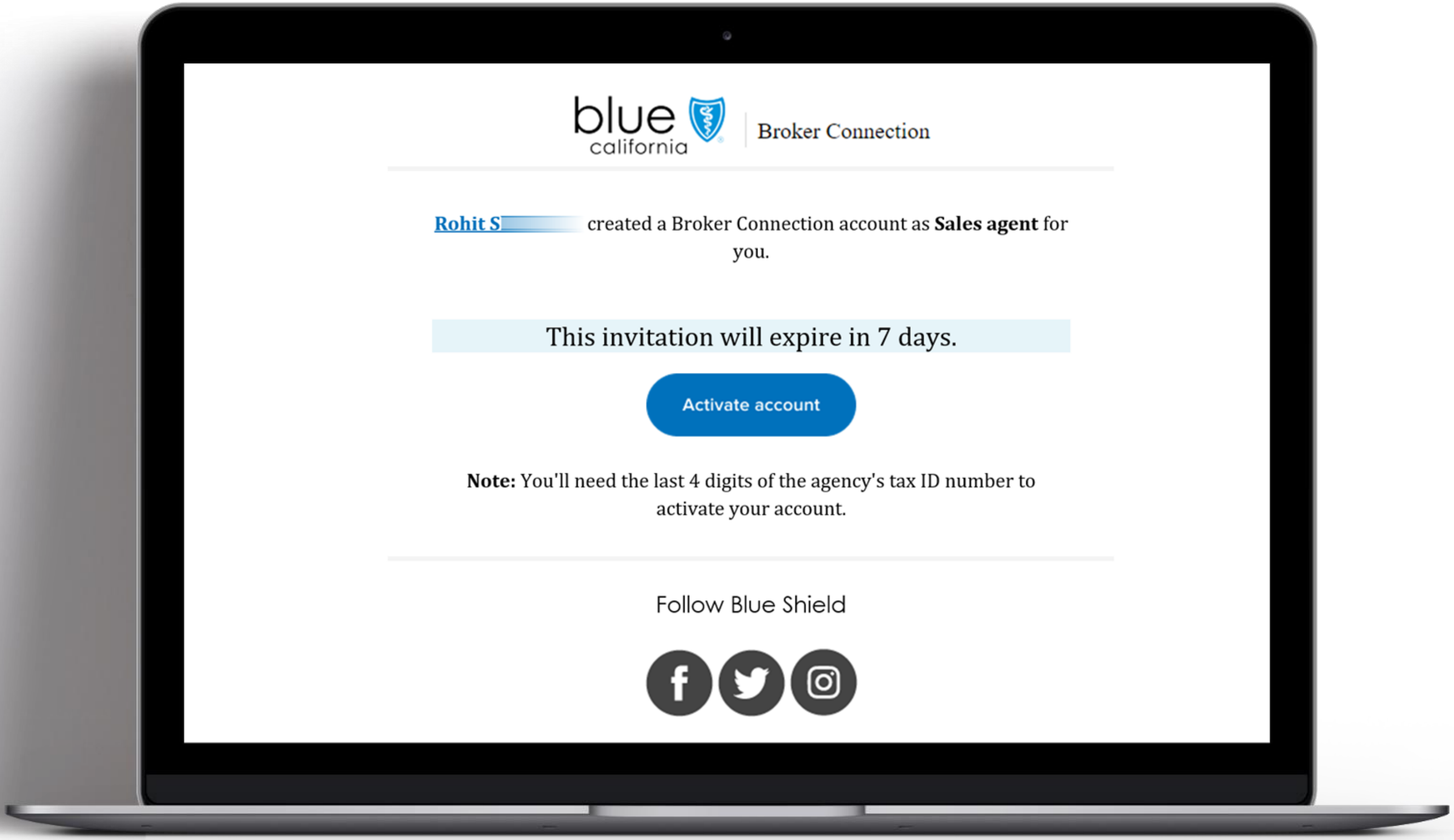


Create an Account

You will get a confirmation stating that an account for a specific individual and specific role was created.

8. Click the **Return to Dashboard** to exit this screen.

Accepting an Invitation & Merging Accounts



Broker Connection registration experience for agents associated with an agency

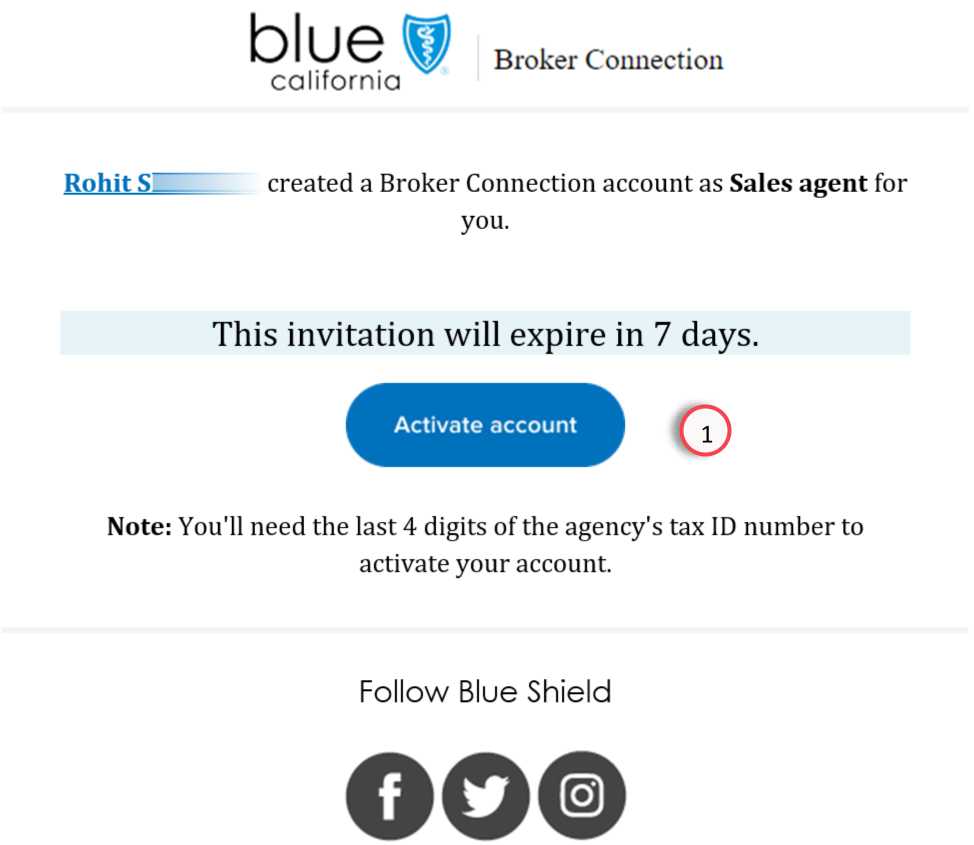
Agents that are currently not appointed with Blue Shield of California, will be able to create an account on Broker Connection through an invite registration process from their agency. Additionally, agents that have Broker Connection accounts or are appointed with Blue Shield can accept an invite to register an account that is associated with an agency.

These types of user accounts are assigned role-based permissions and functionality, as determined by the primary agent or agency and will provide access to tools and resources to help agents sell and help manage their book of business.

Role-based Permissions

User account functionality is determined by role-based permissions and easily set or changed anytime by your designated primary agent for the agency.

Accepting an invitation and merging accounts


Broker Connection

Rohit S created a Broker Connection account as **Sales agent** for you.

This invitation will expire in 7 days.

Activate account

1

Note: You'll need the last 4 digits of the agency's tax ID number to activate your account.

Follow Blue Shield

Invite

In the prior section, a new user was invited to create a Broker Connection.

The new user received their invite email.

1. To accept the invite, **click the Activate Account** button in the invite email.

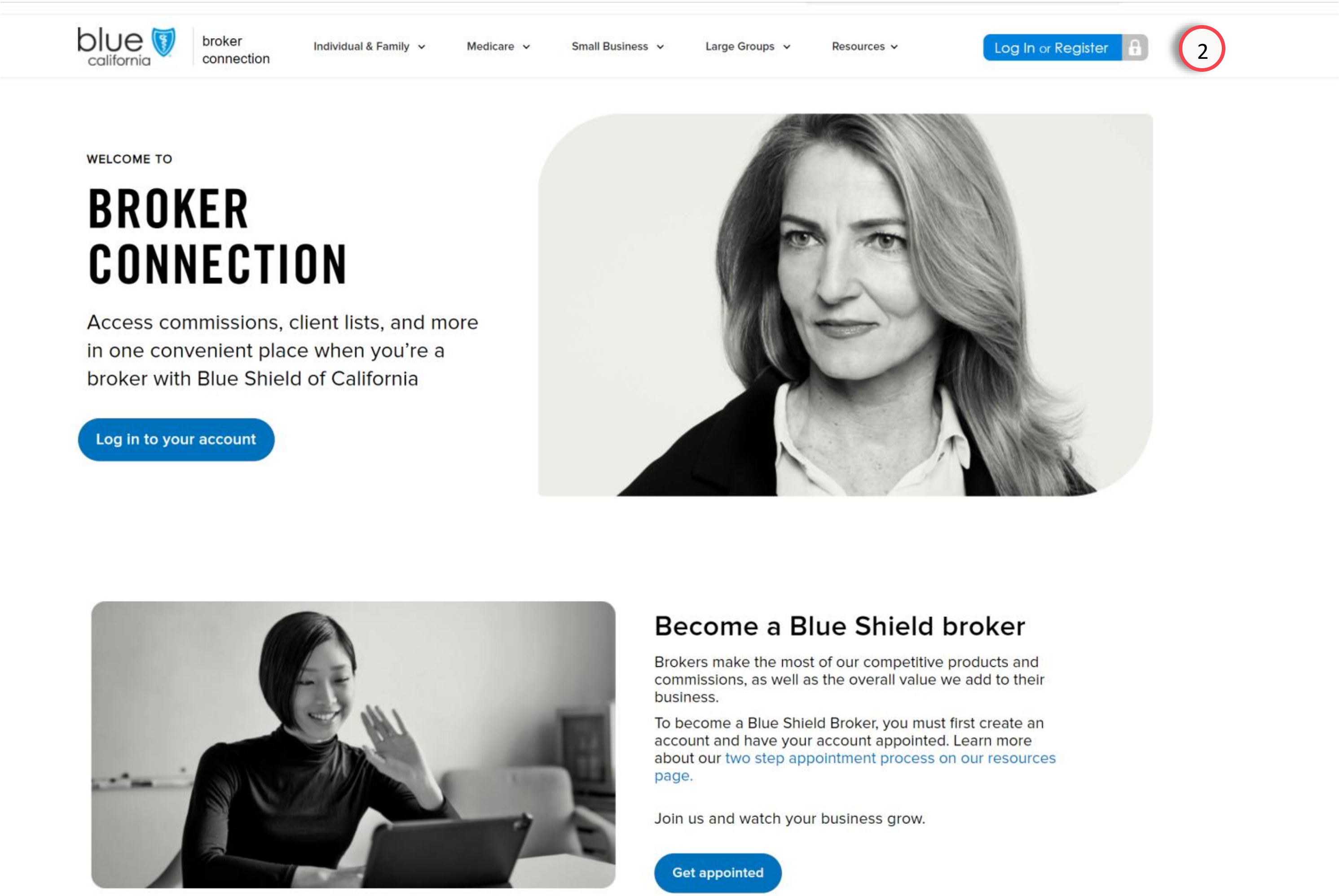
   The invite expires in 7 days.

   If the invite has expired, please contact the sender to create a new invite.

Note:

You will need the last 4 digits of the agency's tax ID number to activate your account.

Register for Broker Connection

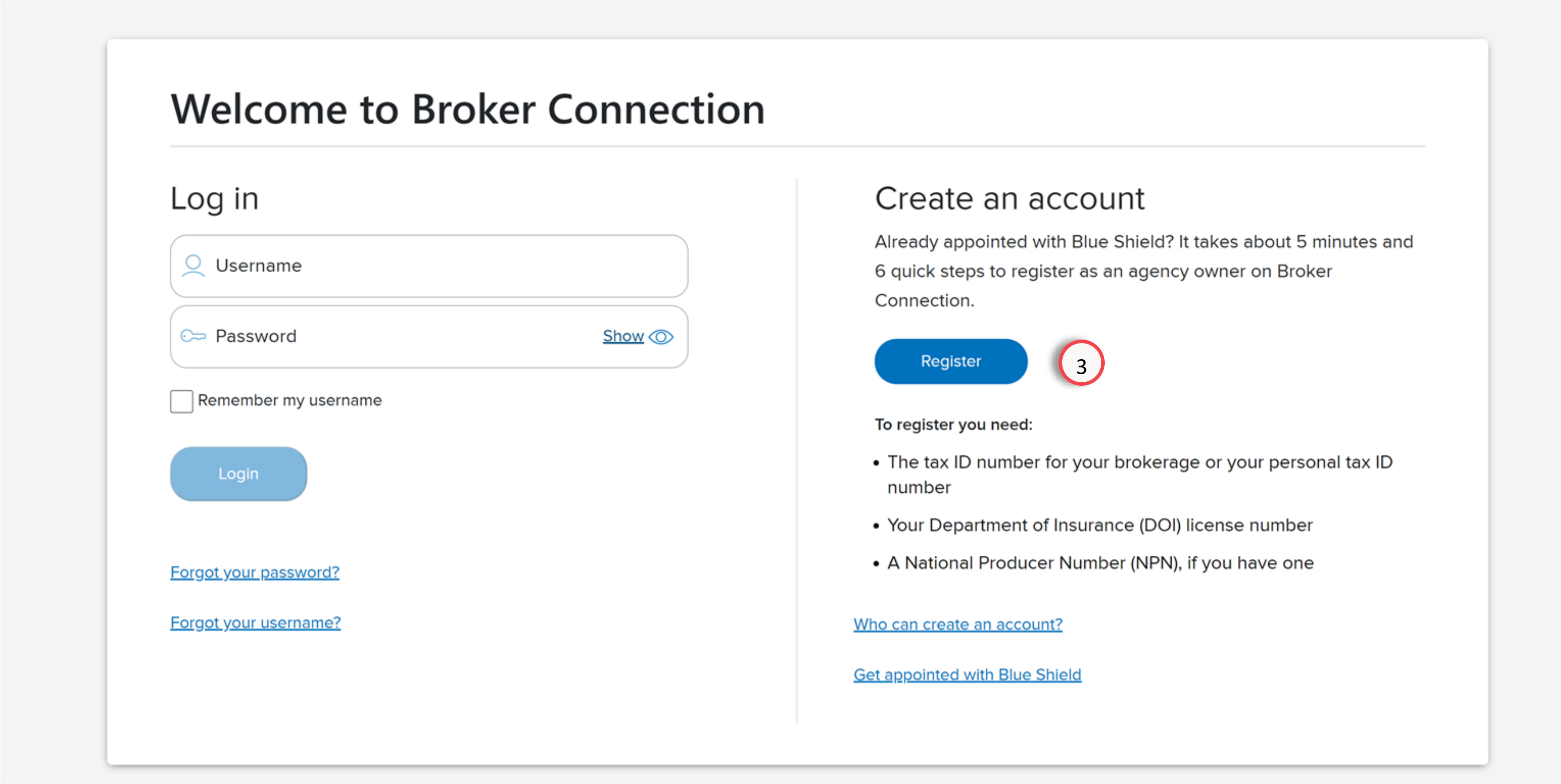


Registration Steps

After clicking on the Activate Account button in the email, you will be taken to the Broker Connection home page.

2. Click the **Log In or Register** button.

Register for Broker Connection



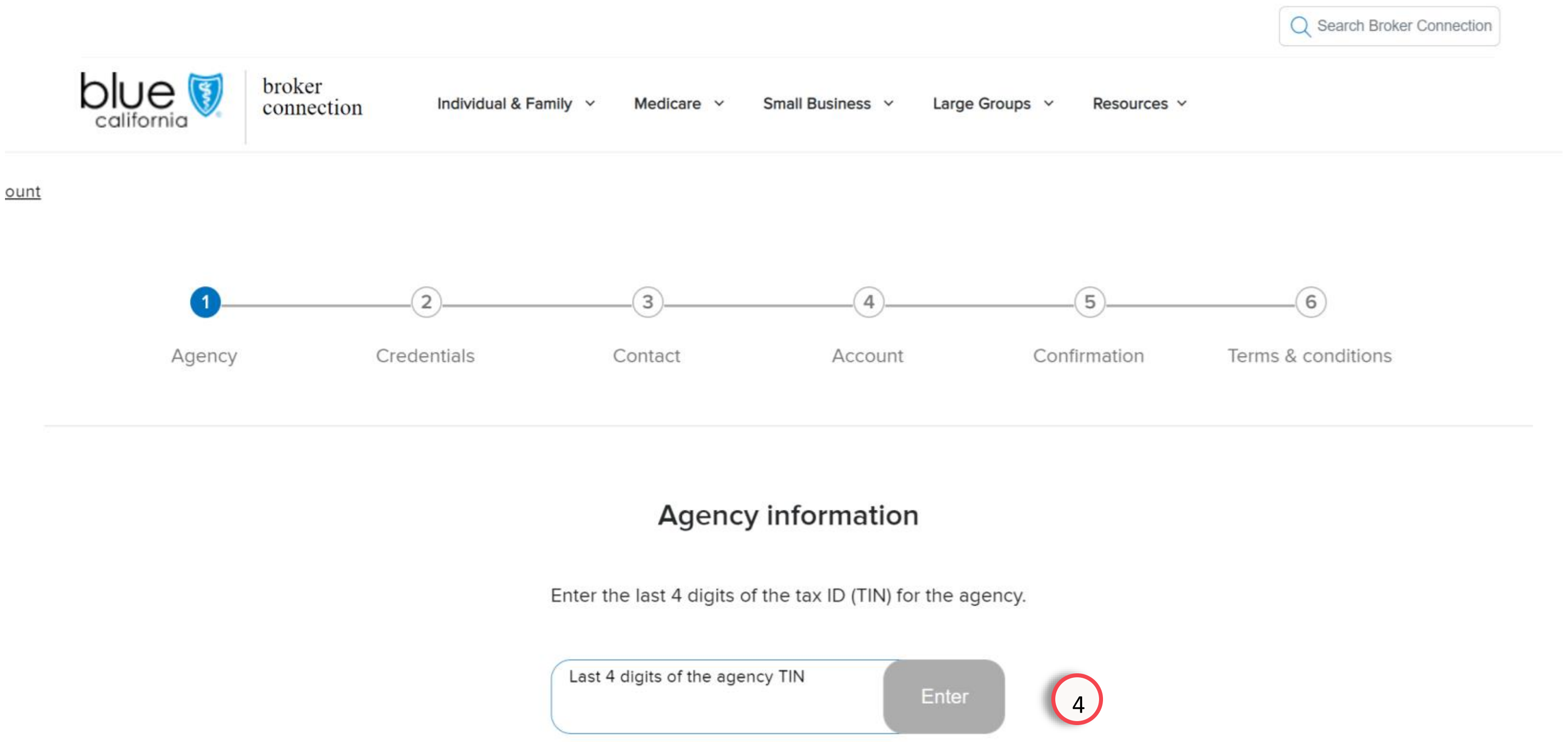
Registration Steps

If you have an account already, do not log in.

You must continue with registration steps to merge and link your account with the agency.

3. Click the **Register** button.

Register for Broker Connection

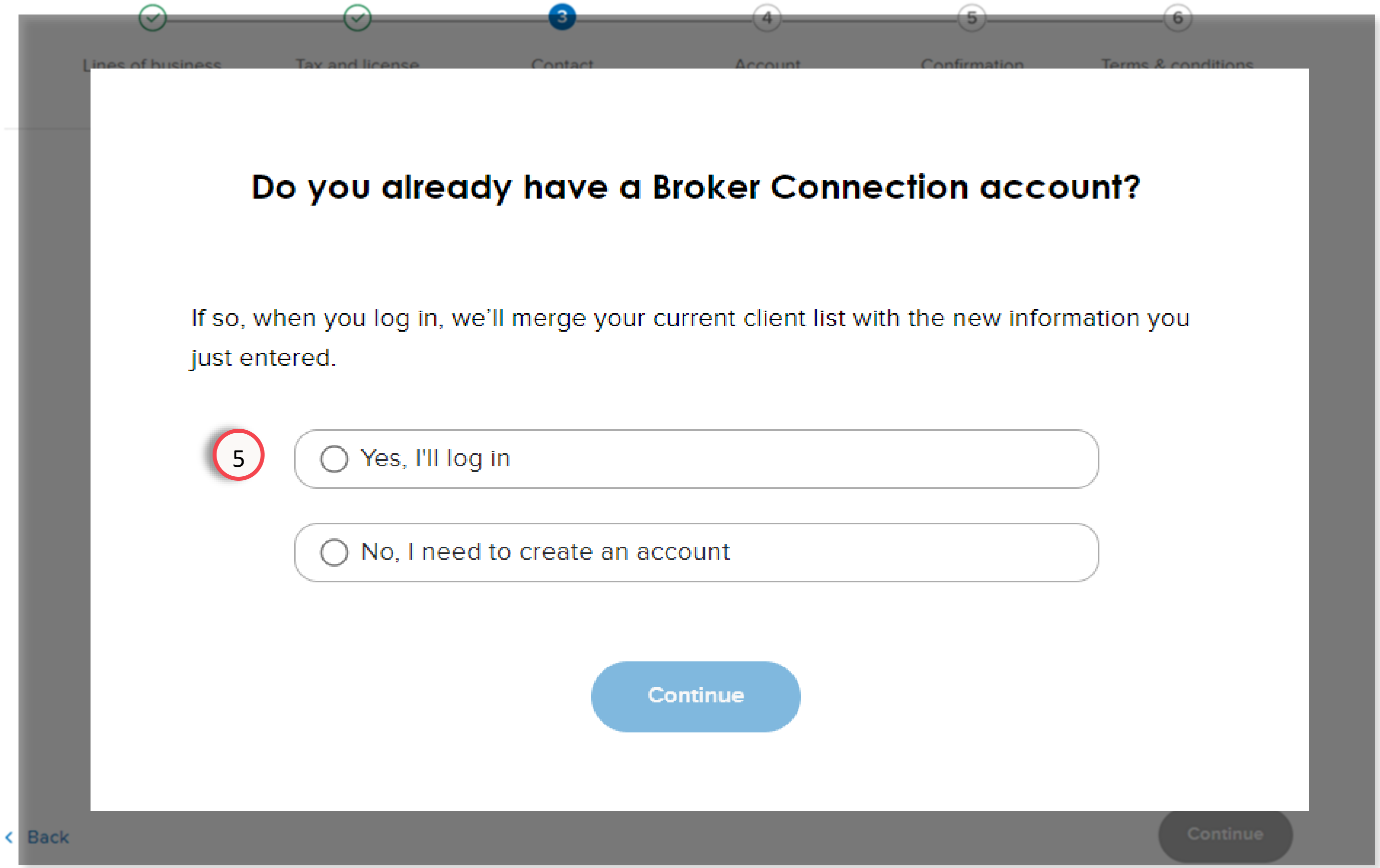


Registration Steps

We see again the six-step process in the non-affiliated agent registration.

4. Enter **last 4 digits of agency TIN** to validate and get started with secondary registration.

Register for Broker Connection



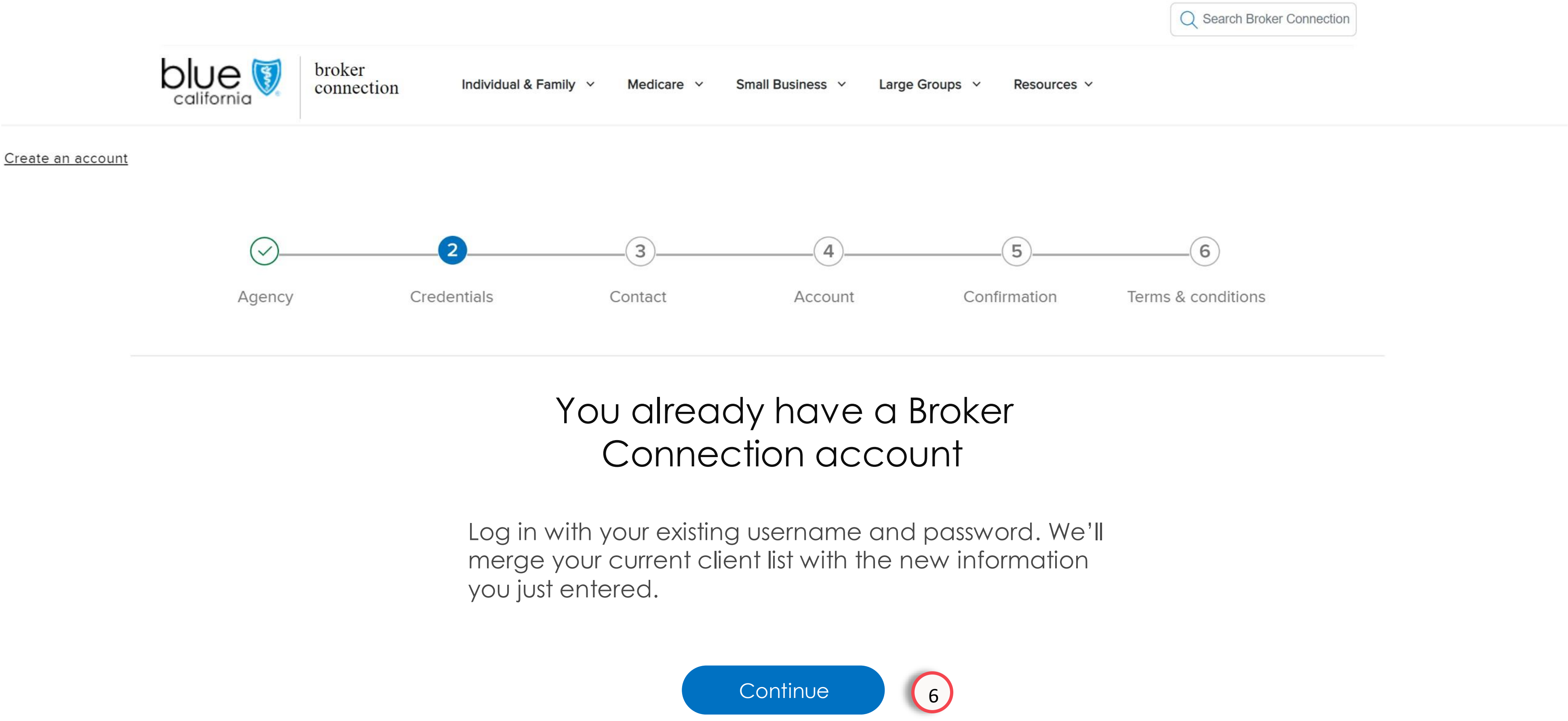
Registration Steps

After entering the Tax Information Number, you will receive a pop-up asking if you have an account.

5. Select a response to the account question (default pop-up).

If you select no, it will follow the same registration process as we demonstrated in the first part of the guide:

Register for Broker Connection

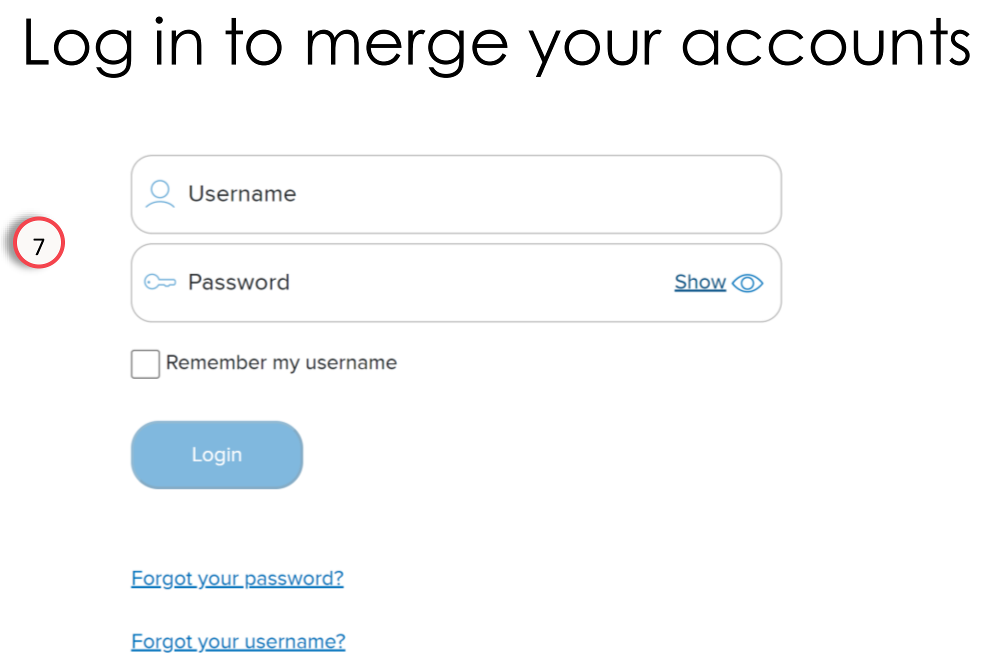


Registration Steps

If you select **Yes, you have a Broker Connection account**:

6. Confirm your **account information**, the system recognizes existing account and click **Continue**.

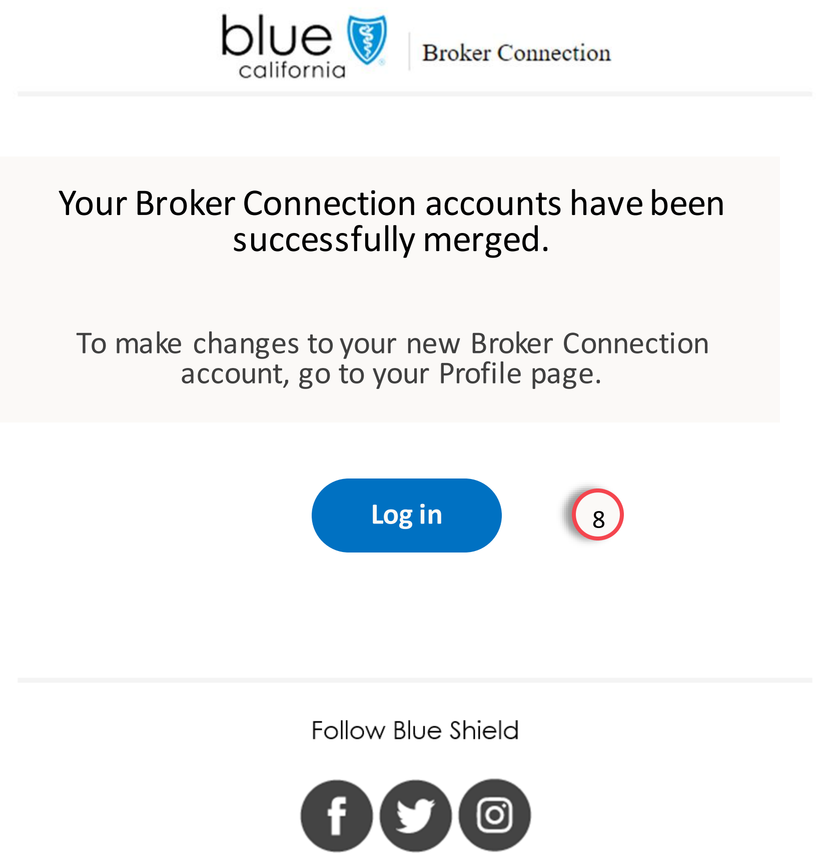
Register for Broker Connection



Registration Steps

7. Log in using your **current ID and password** to merge your accounts.

Register for Broker Connection

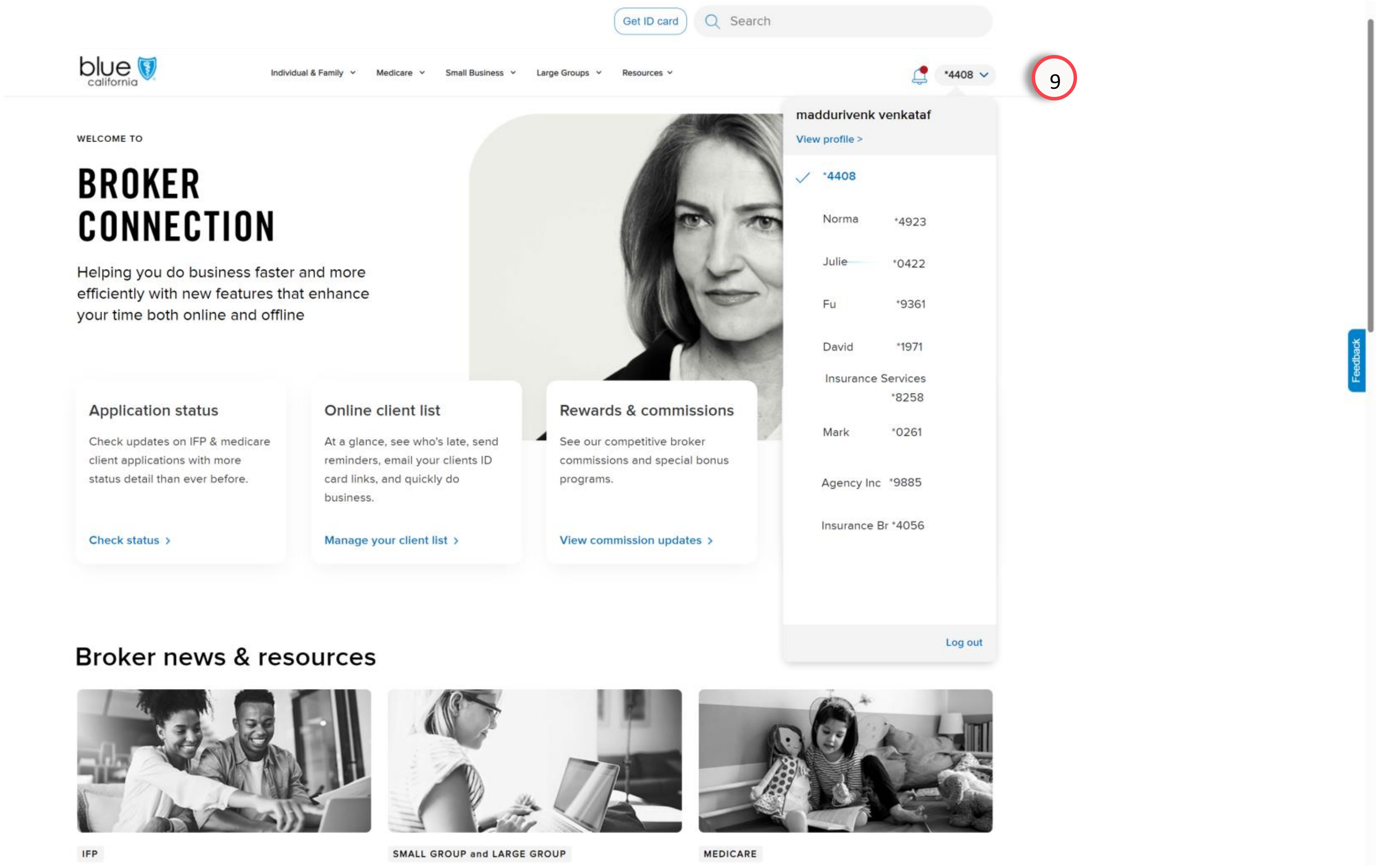


Registration Steps

After you log in, you will receive an email confirming that your account has been merged.

8. Click the **Log in button in the email** to return to Broker Connection.

Register for Broker Connection



Registration Steps

On your next log in, you will see an option to select the company.

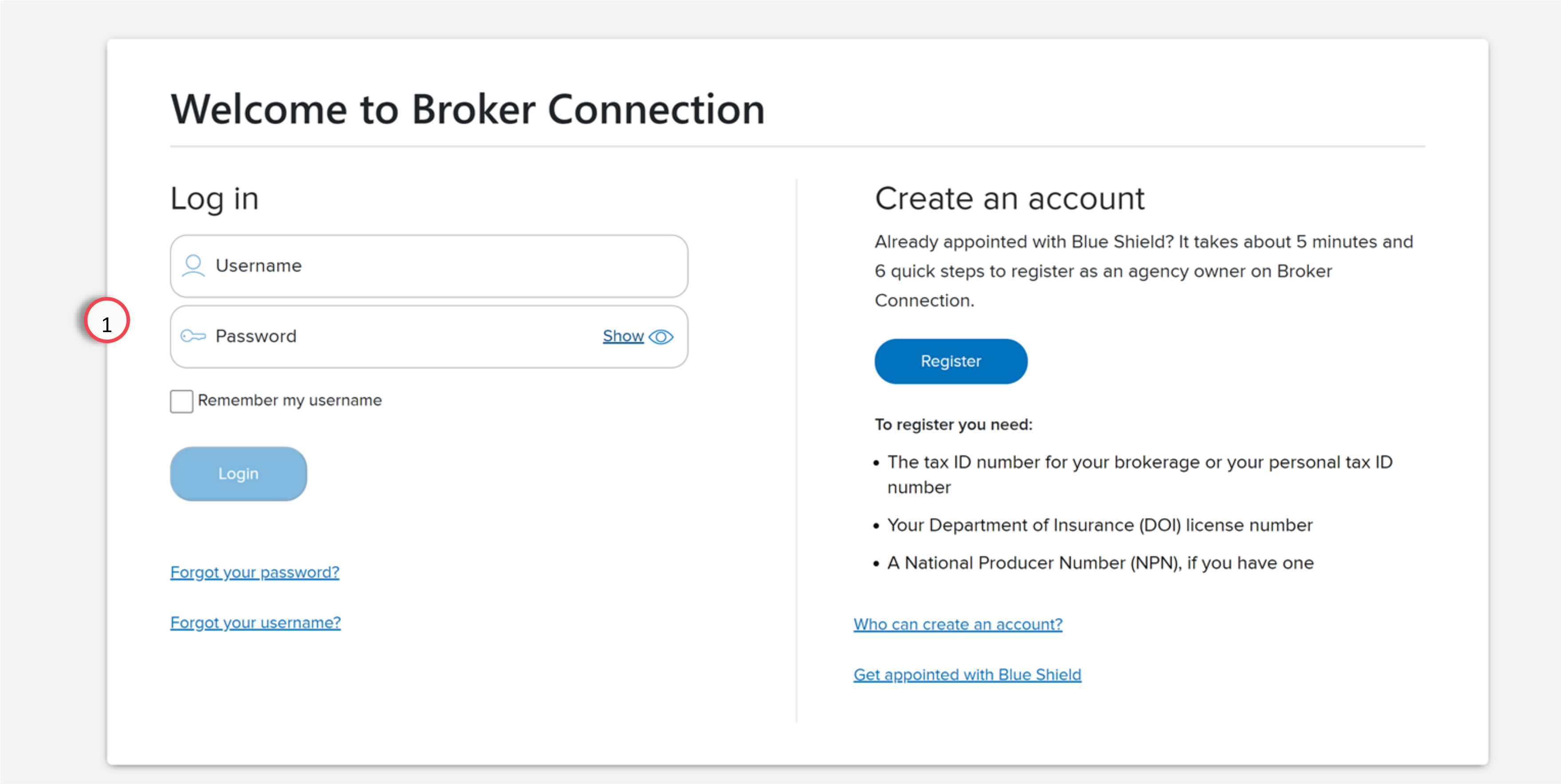
9. When you **select the company**, you will have access to the role assigned to you.

Updating Your Broker Profile

Broker Connection Site

View Section

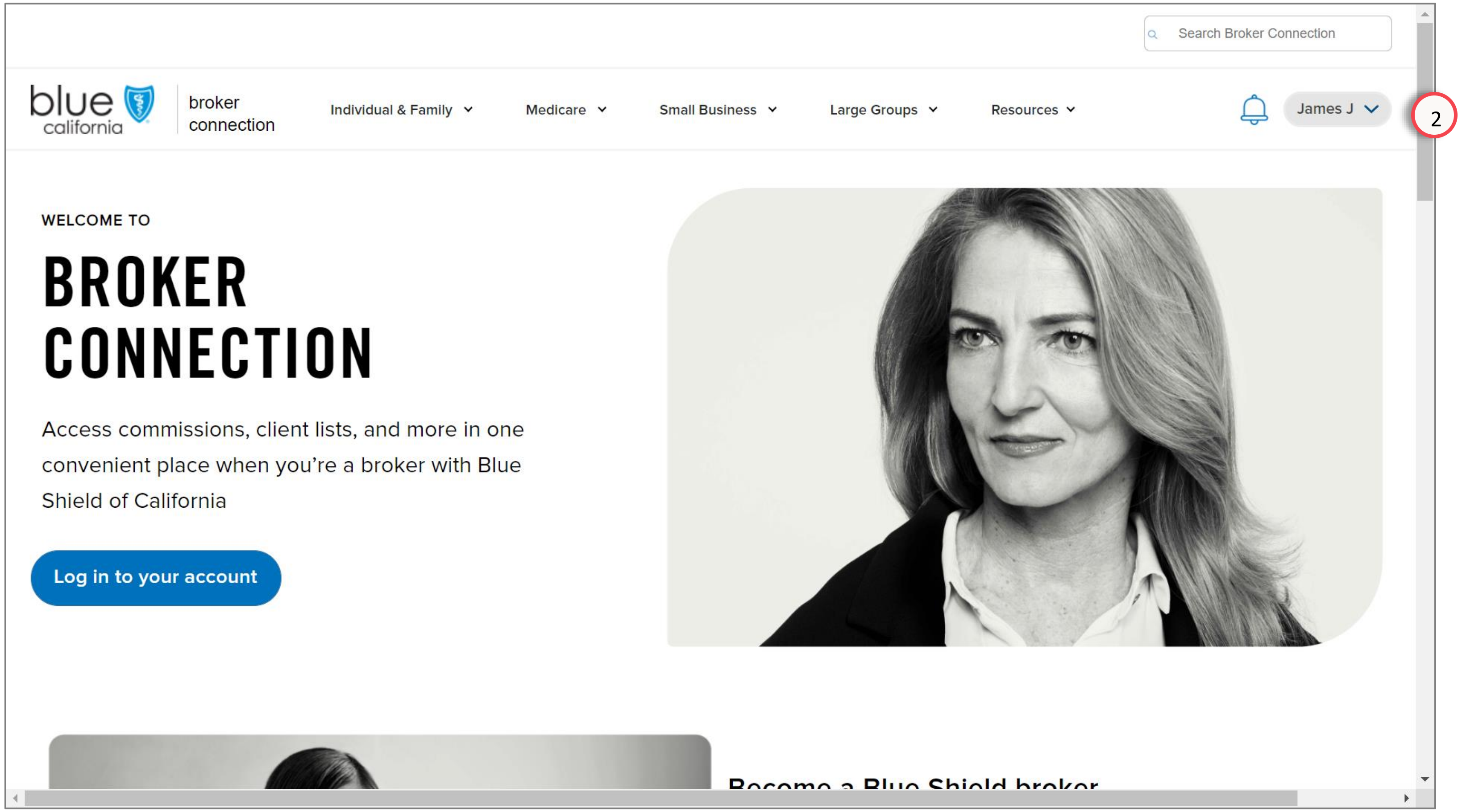
Updating Your Broker Profile



Log In

1. Enter your credentials and click the **Log In** button.

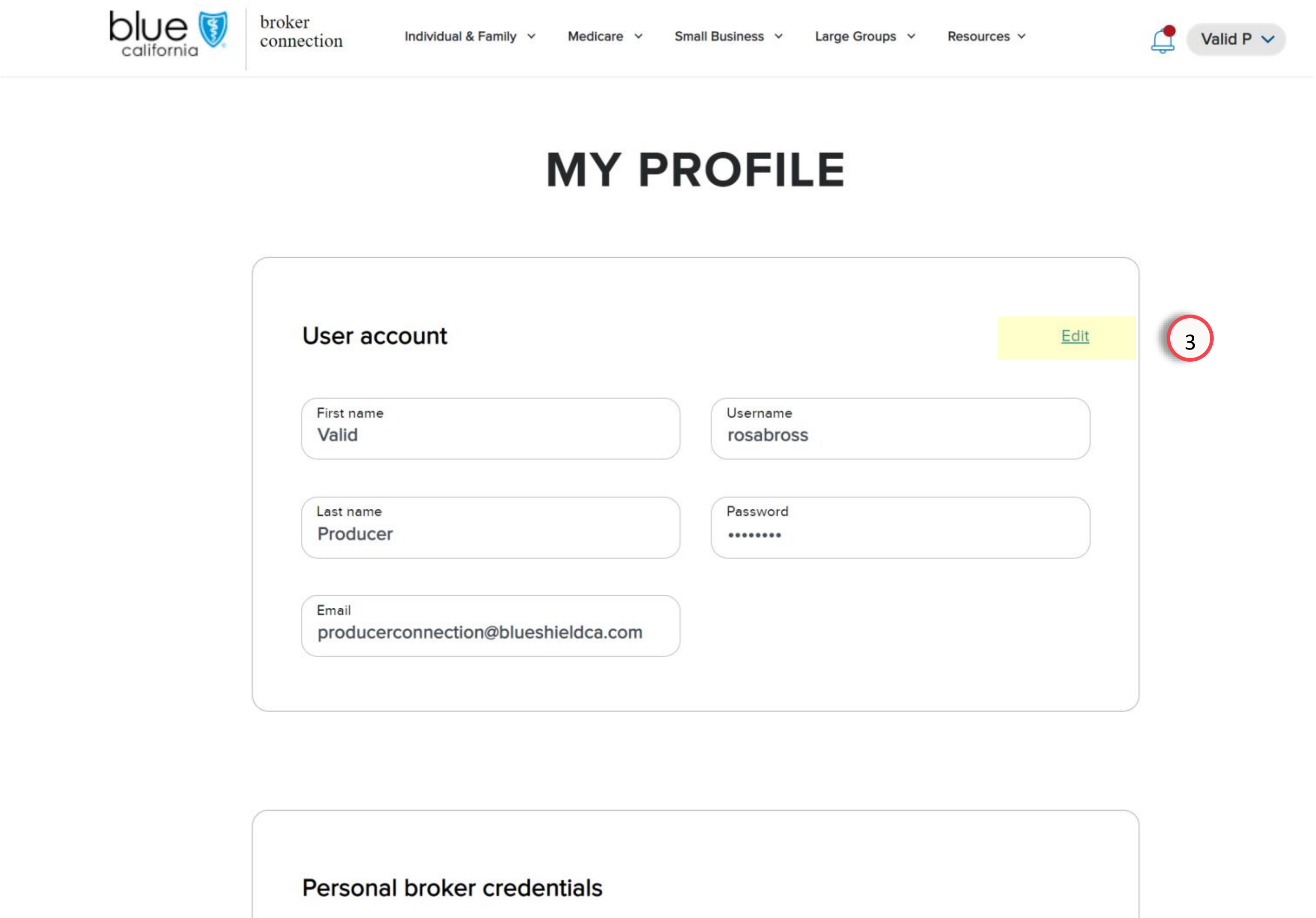
Updating Your Broker Profile



Broker Connection Home Page

2. Click the **profile icon** (your name) at the top right of the page to access your profile information.

Updating Your Broker Profile

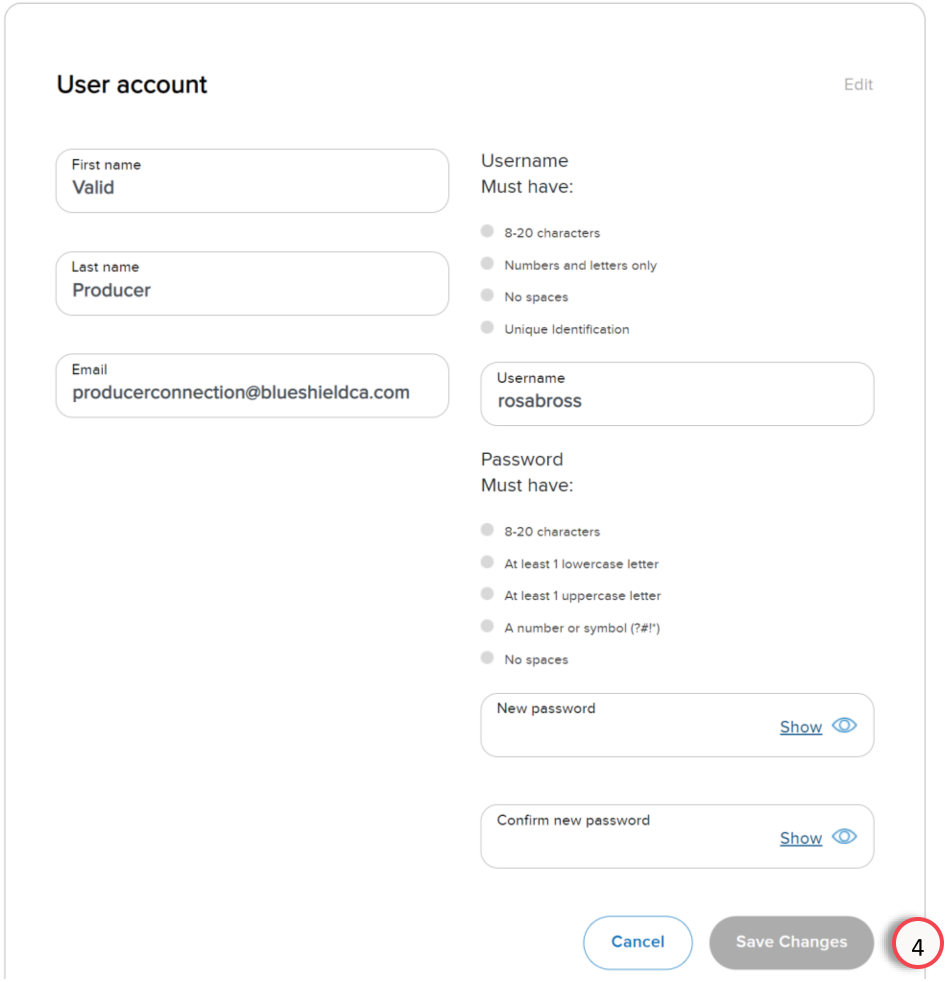


Updating your Profile

3. To update your profile information, click the **Edit** icon in the section you want to update.

Updating Your Broker Profile

MY PROFILE



Updating your Profile

4. When you are done editing your profile, click the **Save Changes** button.

Remember

It's important to keep your information up-to-date.

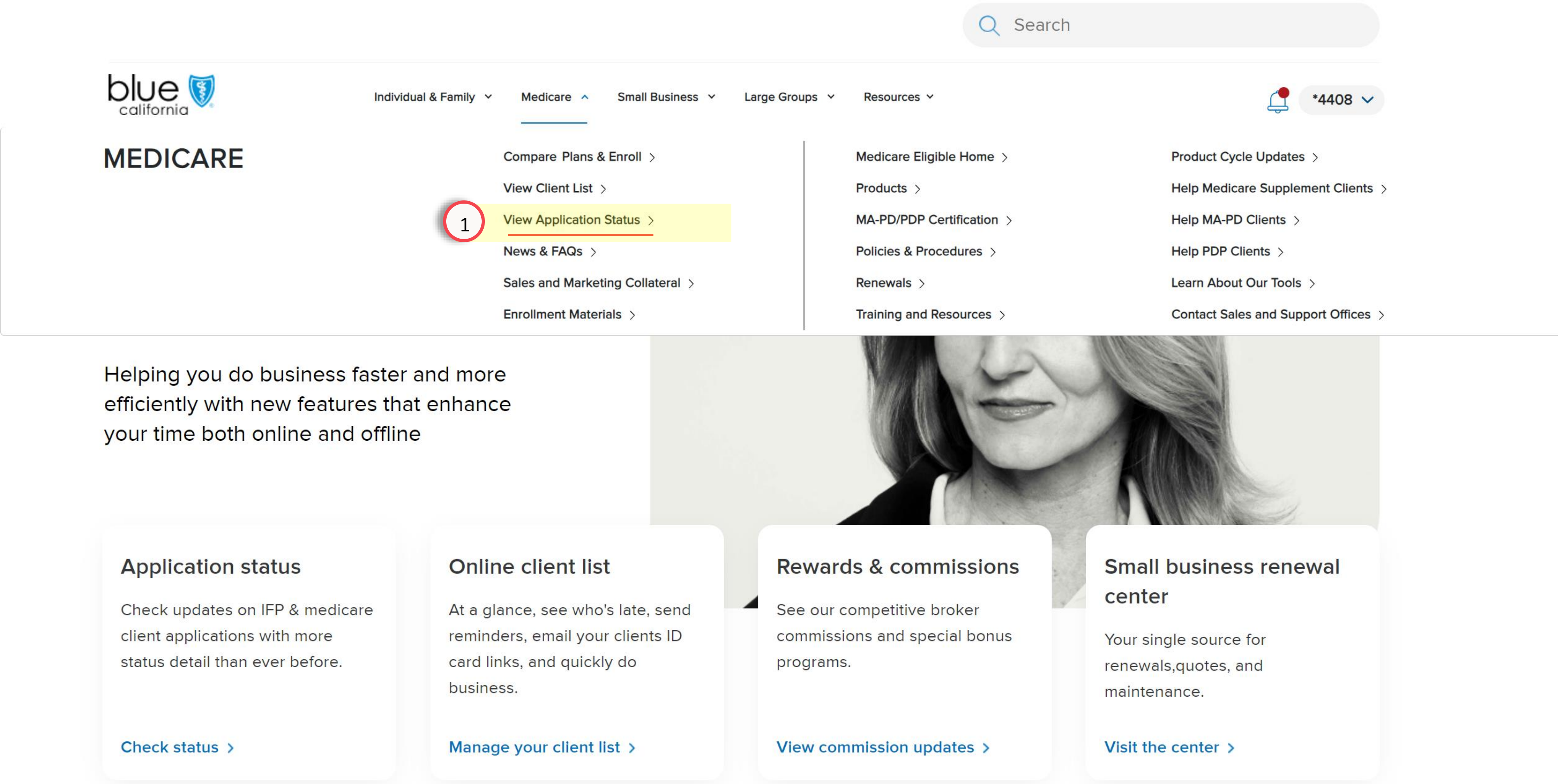
Application Status

Check updates on client applications

View Section

blue california

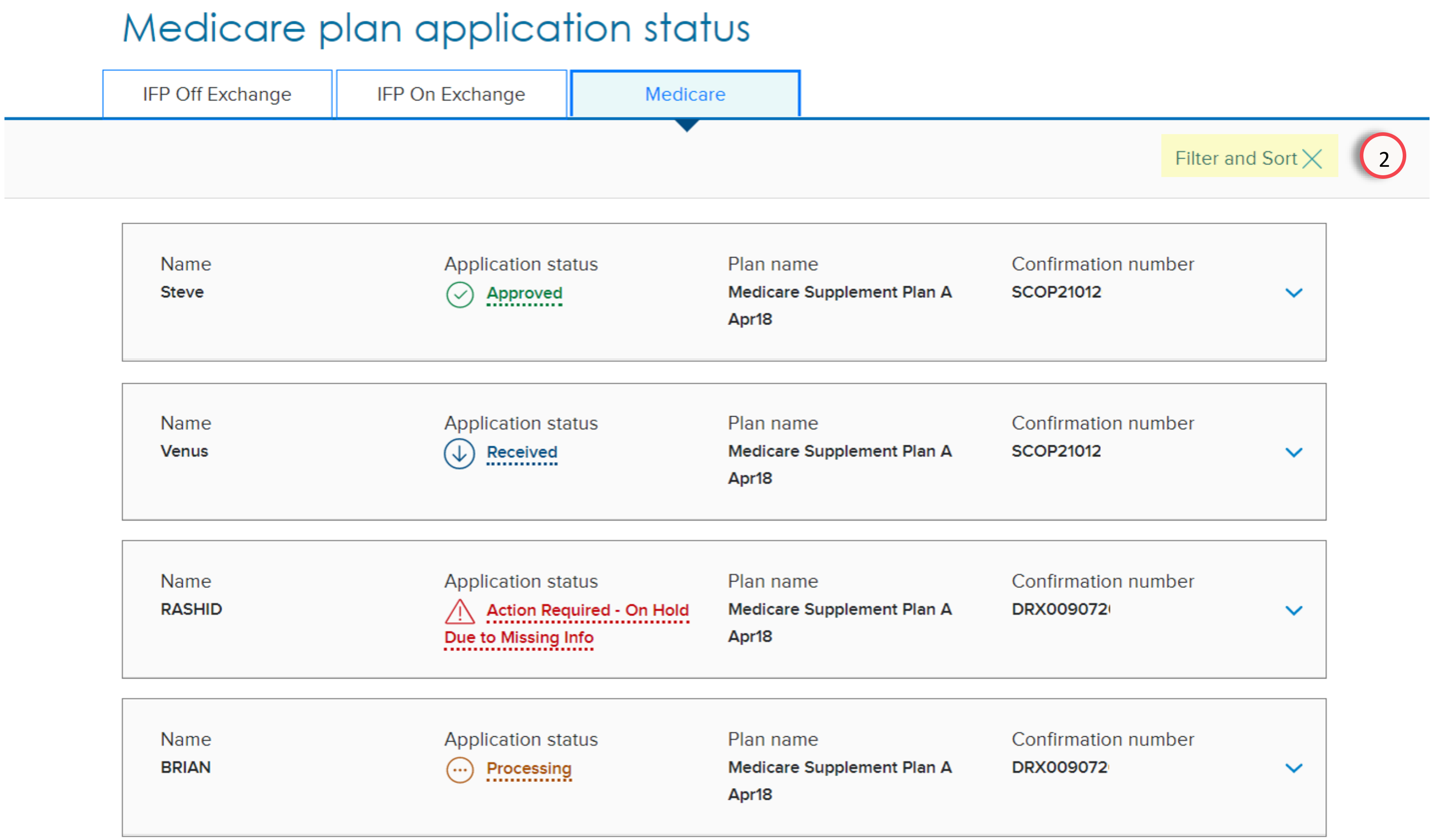
Application Status



View Application Status

Click on the **Medicare tab** on the navigation bar to open the menu.

1. Select **View Application Status** from the menu.

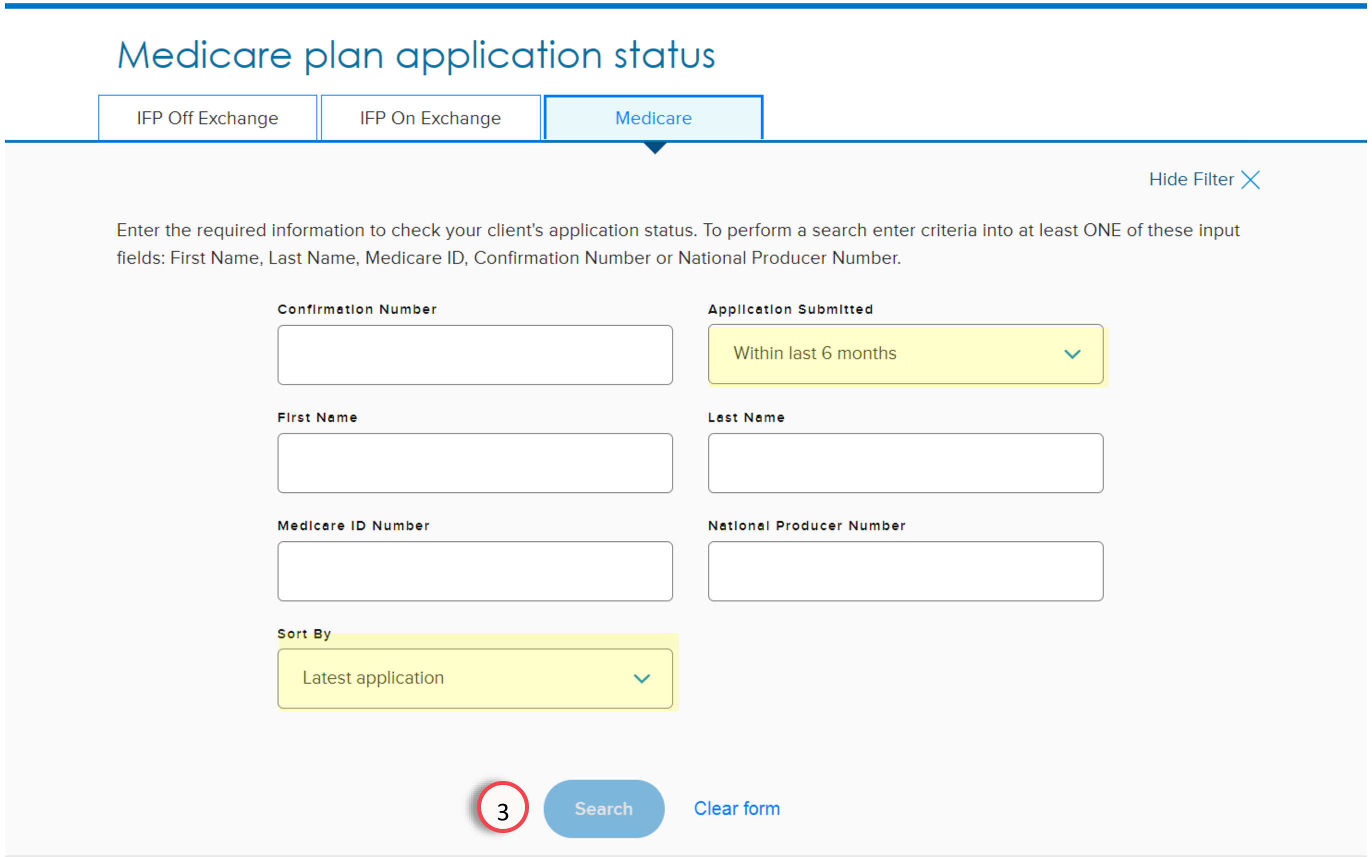


View Application Status

The page displays all available applications and the following information for each:

- Name
- Application status
- Plan name
- Confirmation number

2. Click the **Filter and Sort** link to expand or close the search options.



Register

To perform a search, enter at **least one** criteria in its corresponding field.

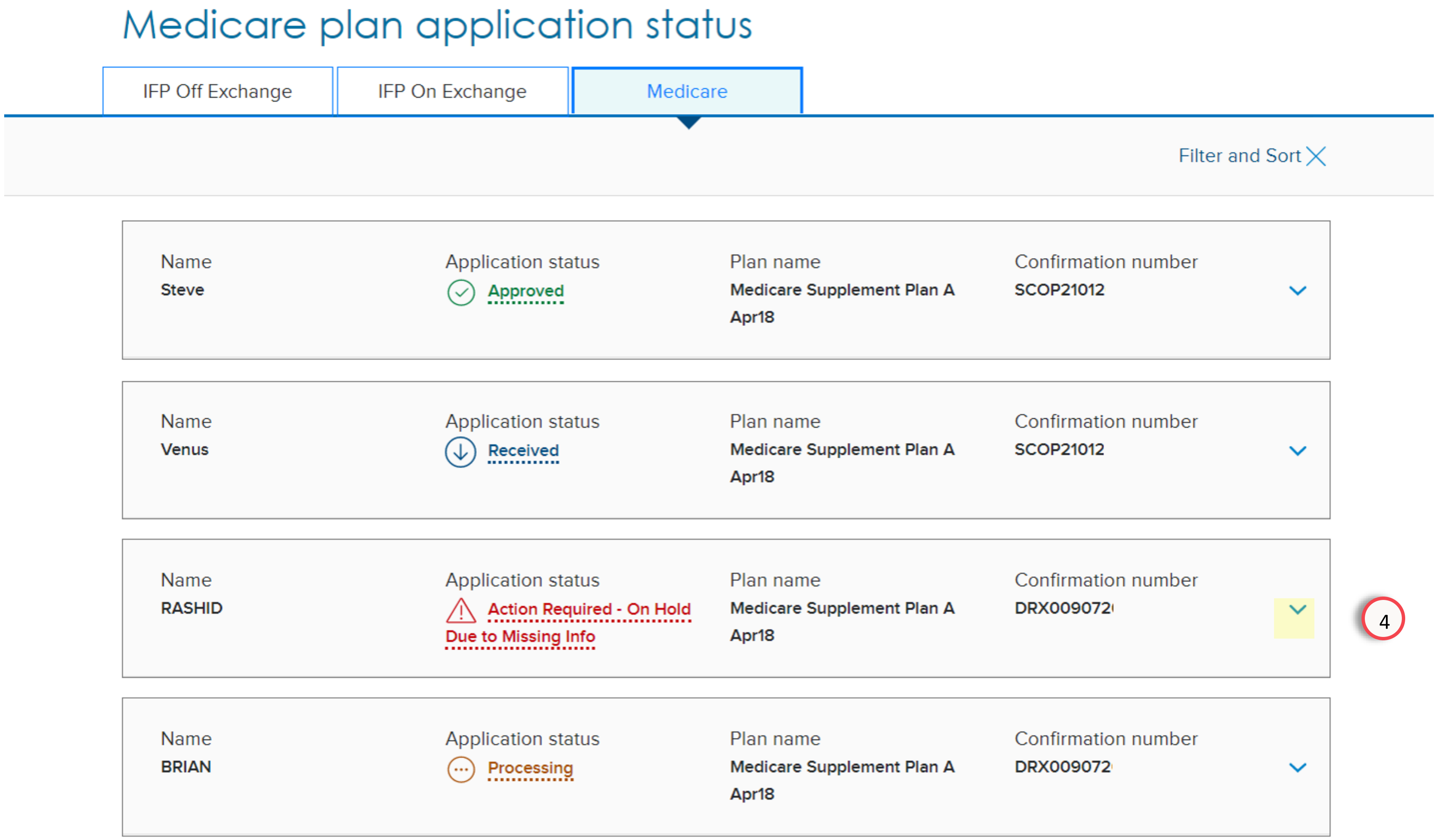
Use the filters (highlighted in yellow) to narrow your search by application submitted:

- Within the last 6 months
- Within the last 24 hours
- Within the last 48 hours
- Within the last week
- Within the last month
- Other

You can sort the results by:

- Latest application
- Last Name

3. Click the **Submit** button to execute the search.



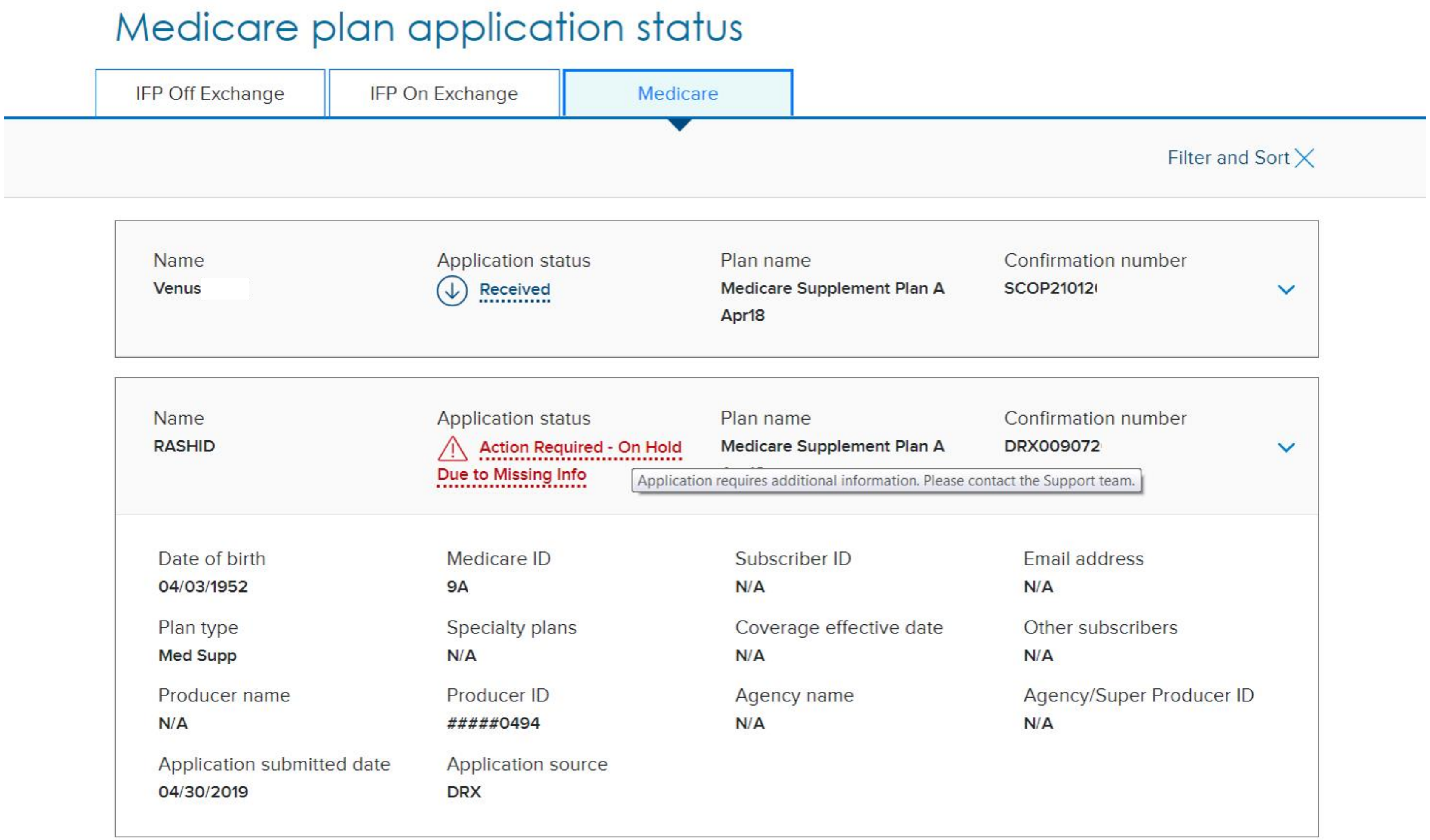
View Application Status

The search results are returned and sorted in the order you selected.

Each result displays the applicant's:

- Name
- Application status
- Plan name
- Confirmation number

4. To view details, click the **Expand** arrow.



View Application Status

Additional details are shown including:

- Application submitted date
- Medicare ID
- Subscriber ID
- Email address
- Producer of record

Note – Hover Text

If you hover your mouse over the **Application status**, additional information about the status is displayed.

When contacting Producer Services, please provide the Application Confirmation Number and Application Status Message.

Application Status

Status Displayed	Hover Text
Closed due to Incomplete Application	Closed due to missing info or by request. Please re-apply if needed.
Closed by Request	Closed due to missing info or by request. Please re-apply if needed.
Declined in Underwriting	Application has been declined during Underwriting process. Contact the Support team for details.
At Prospect's Request	None
Processing. No issues to report	Application is currently being processed.
See status below	Application is currently being processed
Submitted to CMS for approval	None
Please contact our Support team.	None
CMS approved request to enroll	None

Status Options

Here are the different status options that will be displayed and the text you will see when hovering over the status.

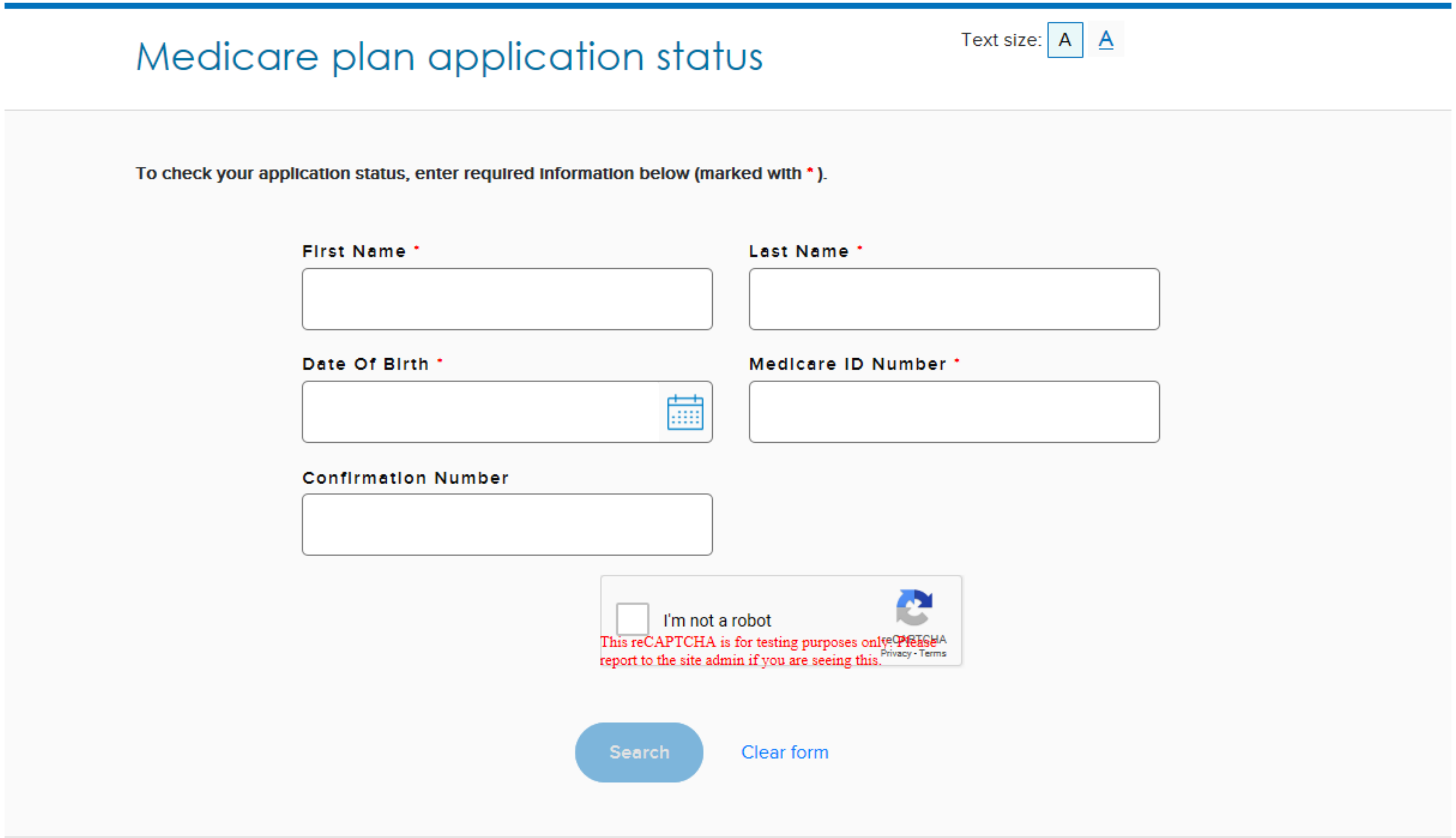
Application Status, Continued

Status Displayed	Hover Text
Approved	Application has been approved. Member will be/is active on effective date.
Request to cancel was received	None
Terminated by Request	None
Contact Producer Services	Contact your broker or Customer Support
Enrollment Denied by CMS	Enrollment Denied by CMS
ID Card Sent	ID Card Sent
Received	Application has been received.
Terminated	Application cancelled before effective date.

Status Options

Here are the different status options that will be displayed and the text you will see when hovering over the status.

Prospect Application Status Site



Prospect Application Status

You can share the confirmation number with your client, so they too can check the status of their application.

Link to Prospect Application Status Site:

[BrokerWebApp: Blue Shield of California (blueshieldca.com)]

Client List

Broker Connection Site

View Section

Client List (OLCL) Recent Updates

- Powerful data exporting options
- Send ID cards to the client
- Send Payment reminders to the client

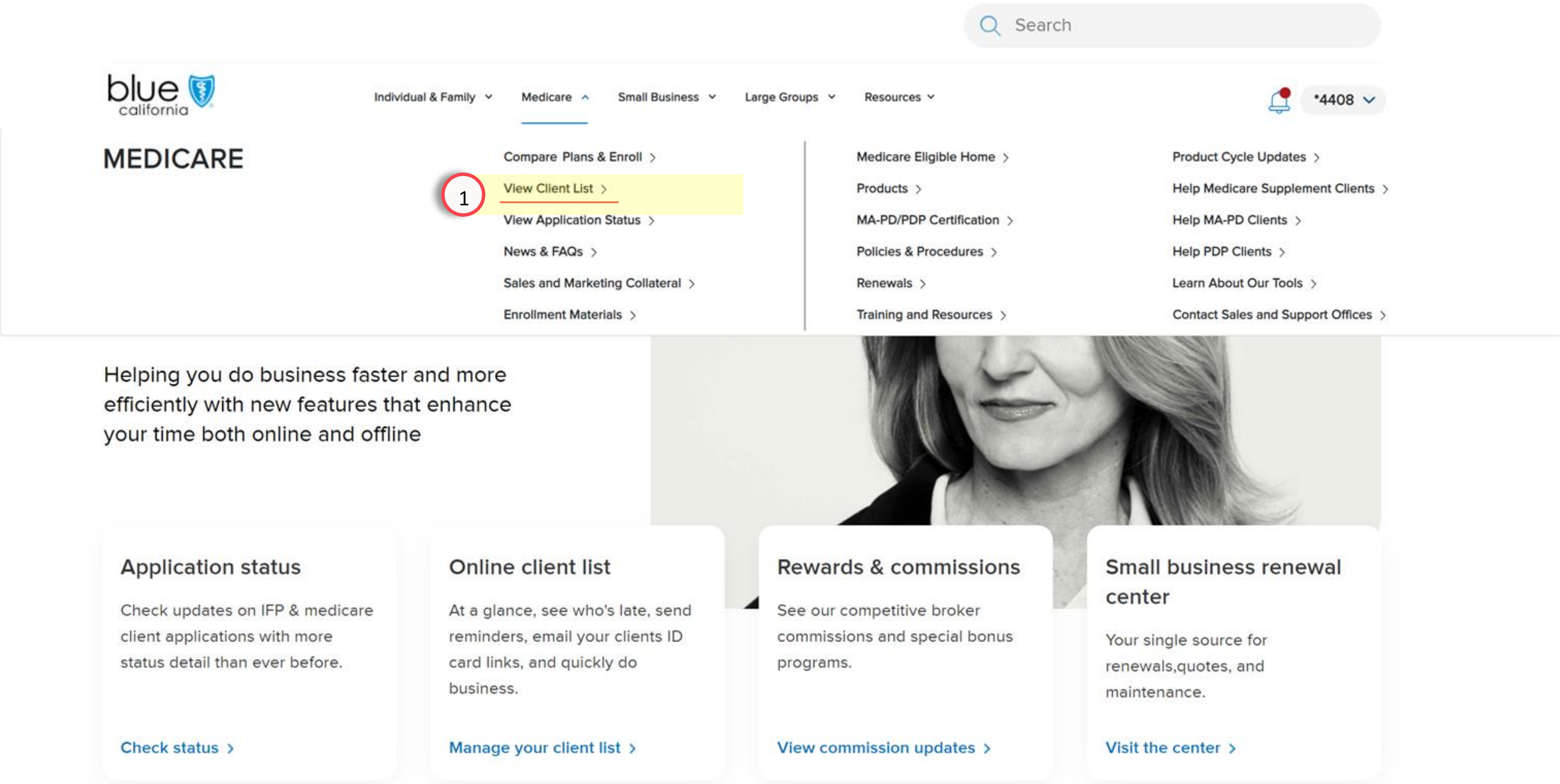
Highlights

The Client List displays your prior and newly enrolled clients.

Please note that pending and prospective clients are not displayed on this list.

To view pending or prospective clients, refer to your Dashboard in the “Compare Plan & Enroll” application.

Client List



Main Menu

The Client List displays your prior and newly enrolled clients.

Note

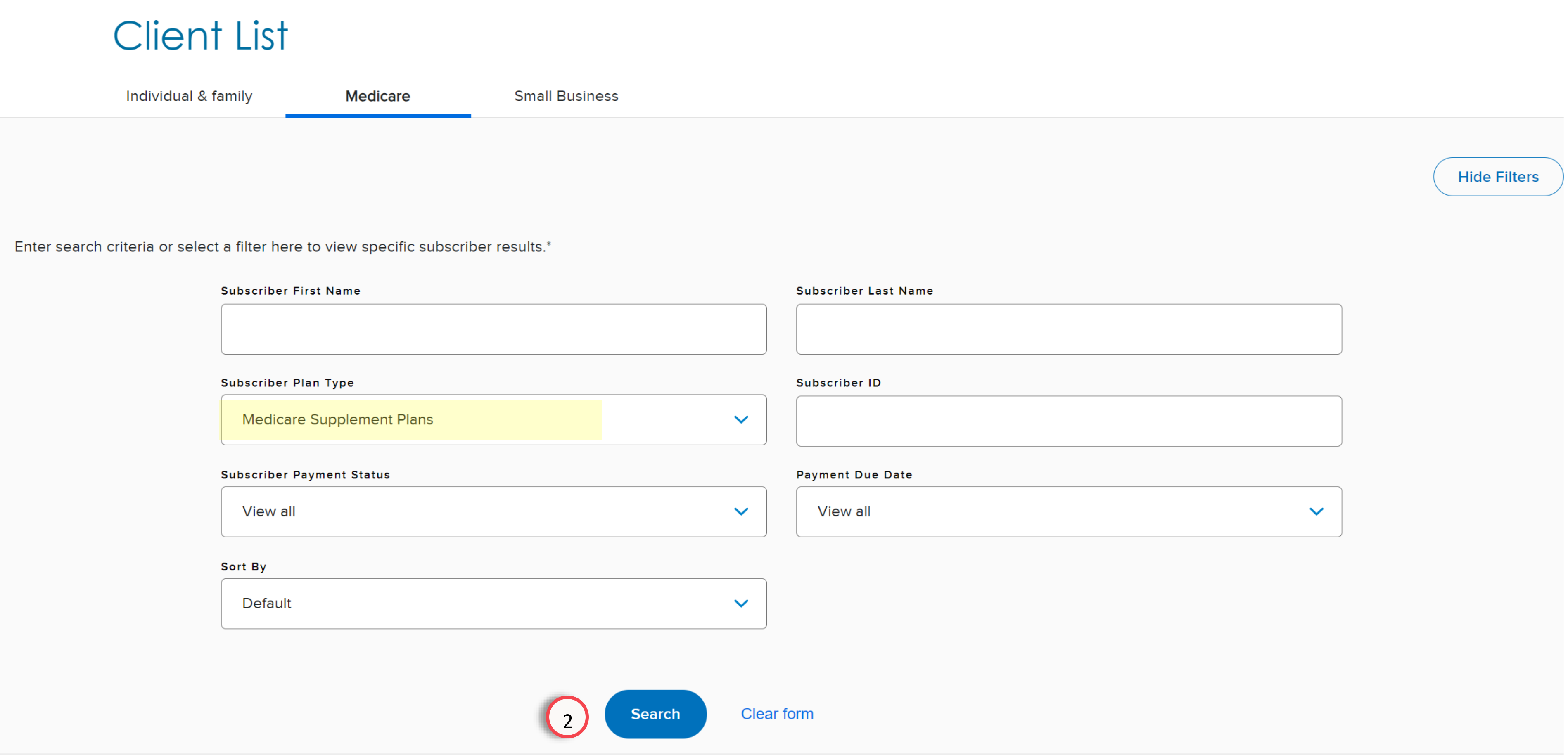
Pending and prospective clients are not displayed on this list.

To view pending or prospective clients, refer to your Dashboard in the **Compare Plan & Enroll** application.

Click on the **Medicare tab** on the navigation bar to open the menu.

1. Select **View Client List** from the menu.

Client List



Viewing Your Client List

To perform a search, enter at **least one** criteria in its corresponding field.

Example:
Use the filters (highlighted in yellow) to narrow your search by Subscriber Plan Type:

- Medicare Supplement Plans
- MAPD
- PDP

You can sort the results by:

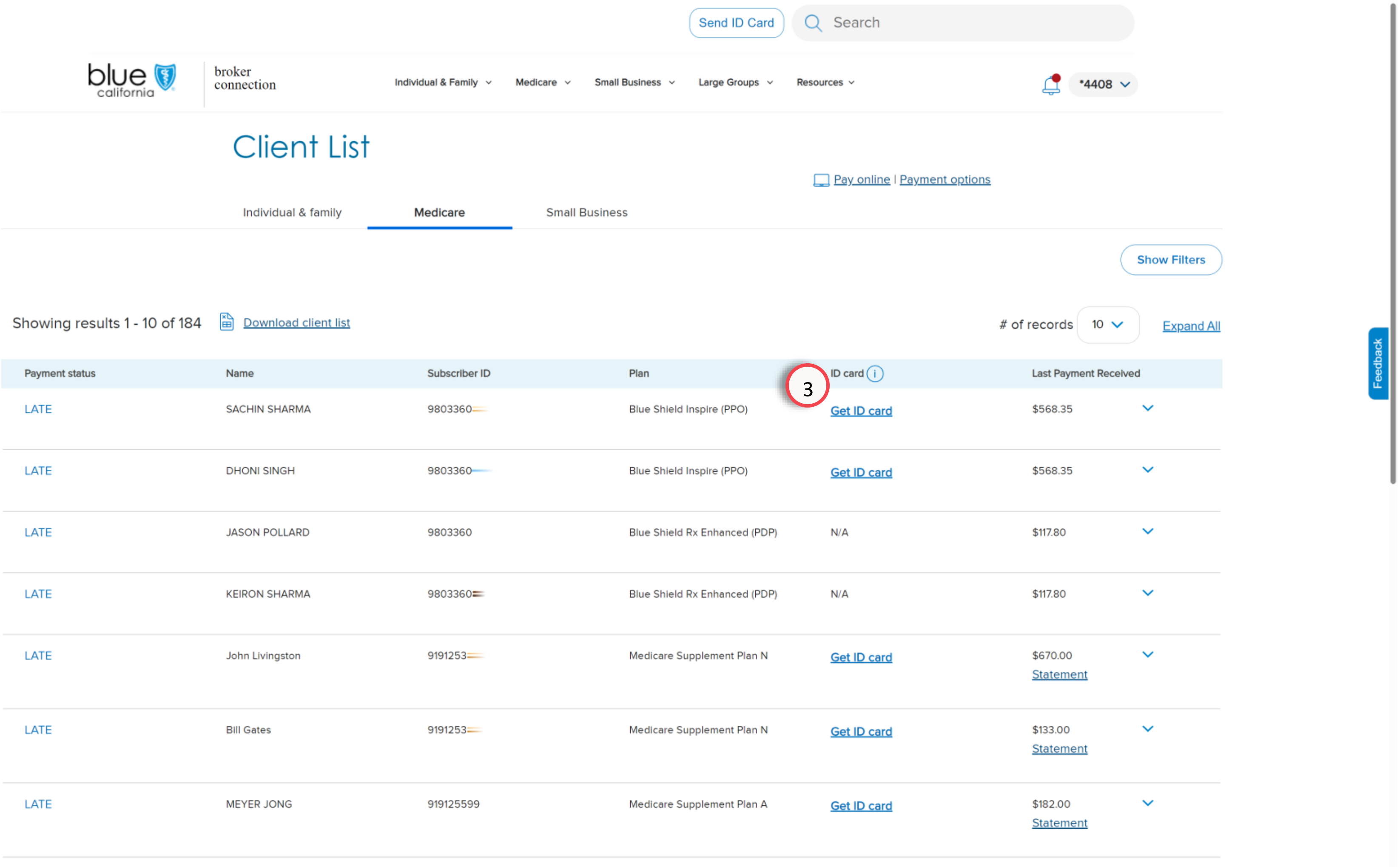
- Payment Status
- Last Name
- Subscriber ID

2. Click the **Search** button to execute the search.

Note:

To clear search results, click the **Clear Form** button.

Client List



Get ID Cards

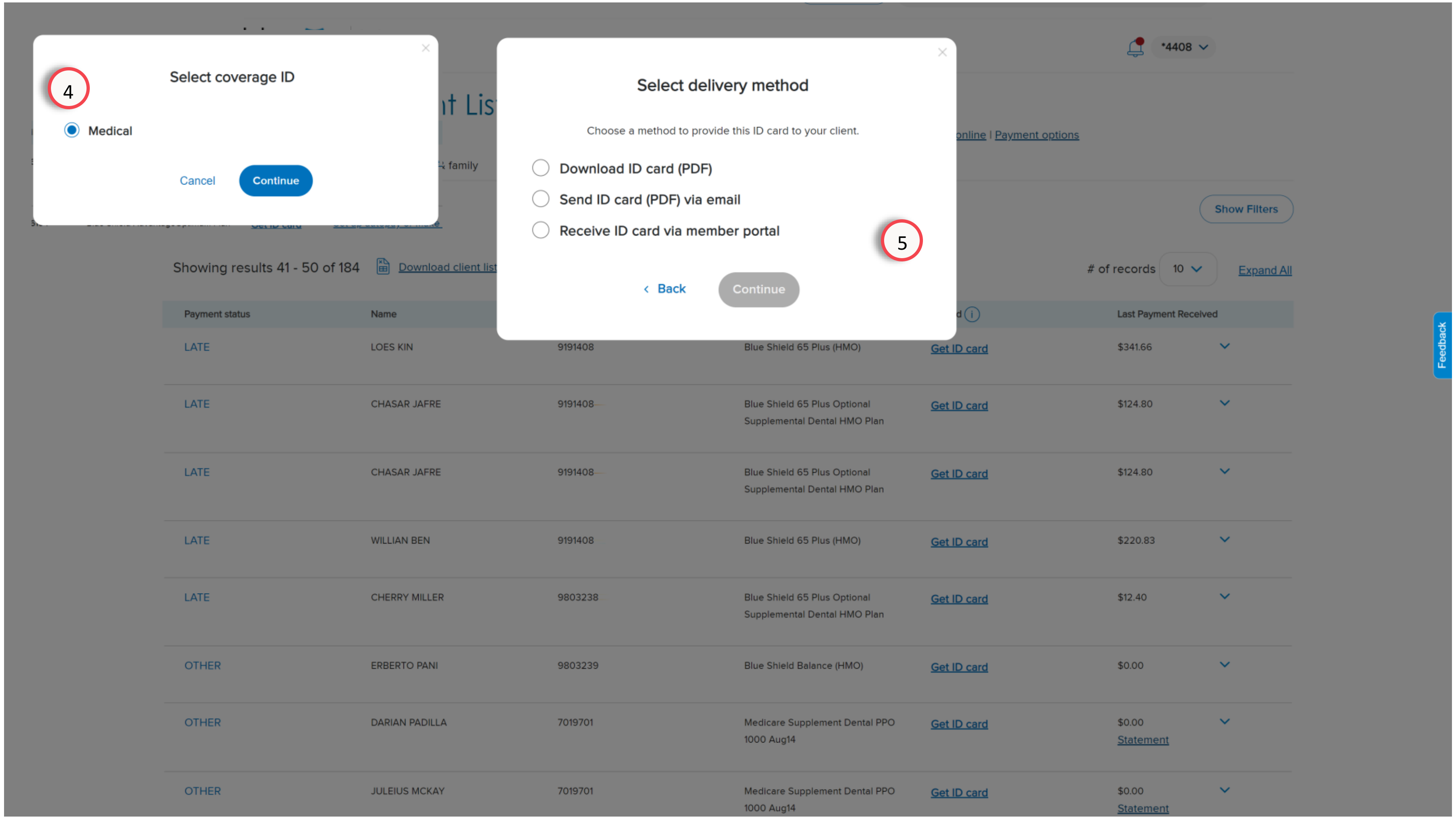
The Client List provides a snapshot of your client's enrollment data including:

- Payment Status
- Name
- Subscriber ID
- Plan Name
- ID Card
- Manage Payments
- Last Payment Received

You can provide a copy of your clients' ID Card by downloading a PDF version for print, sending their ID via email, or emailing instruction to download via the Member Portal.

3. Click **Get ID card** to view options to send the ID card.

Client List



Get ID Cards

When you click on Get ID card, you will see a pop window with your client's available ID cards for their plans.

In some cases, the ID card may not be ready yet; however, you can email your client to let them know, and help them schedule services with their provider by clicking the send email button.

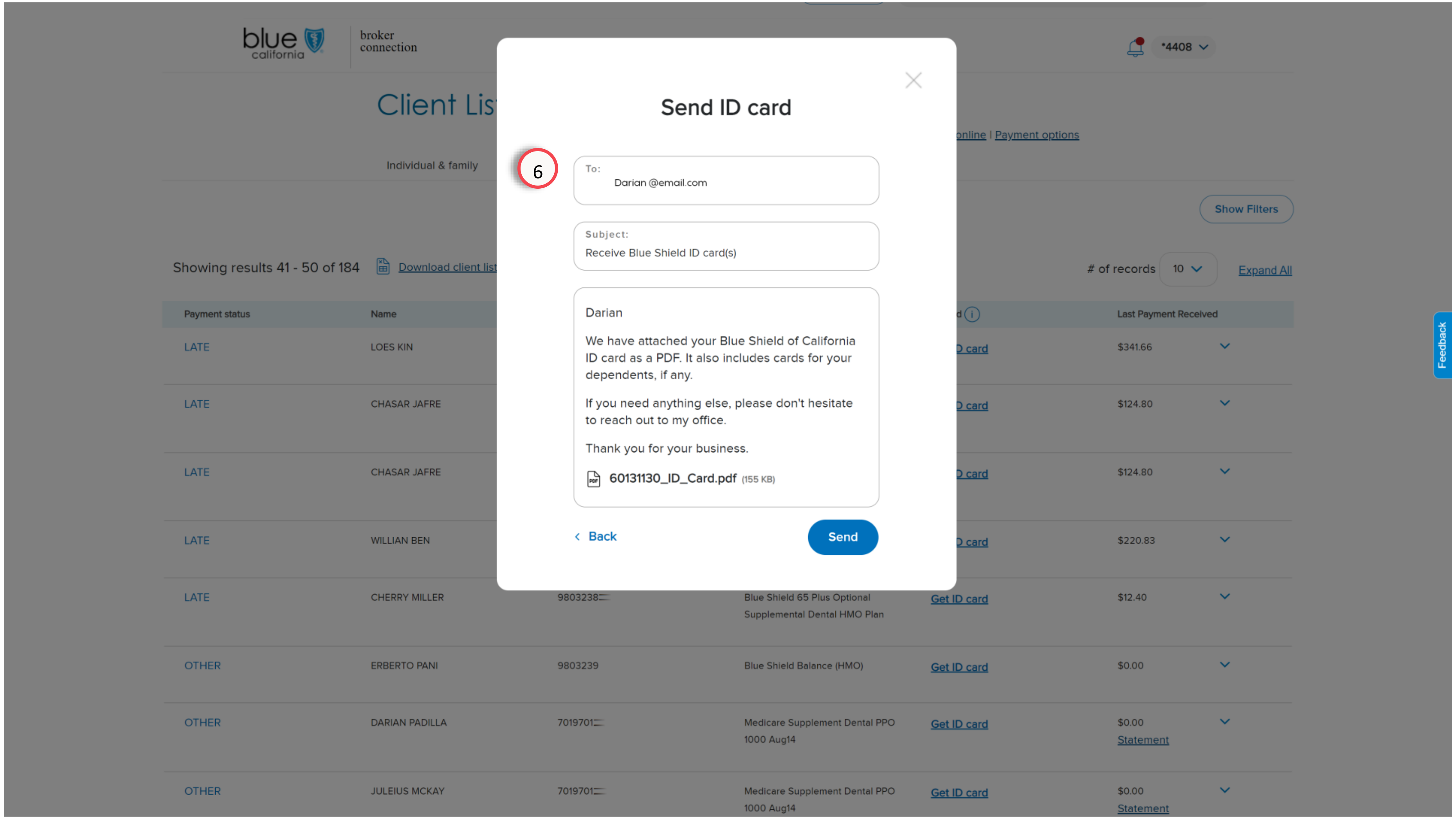
4. **Select** the Coverage and click continue.
5. **Select** a method to provide this ID card to your client and click continue.

Example:

To download the ID card, select the download option and click Continue.

A PDF of the ID will be downloaded for printing.

Client List



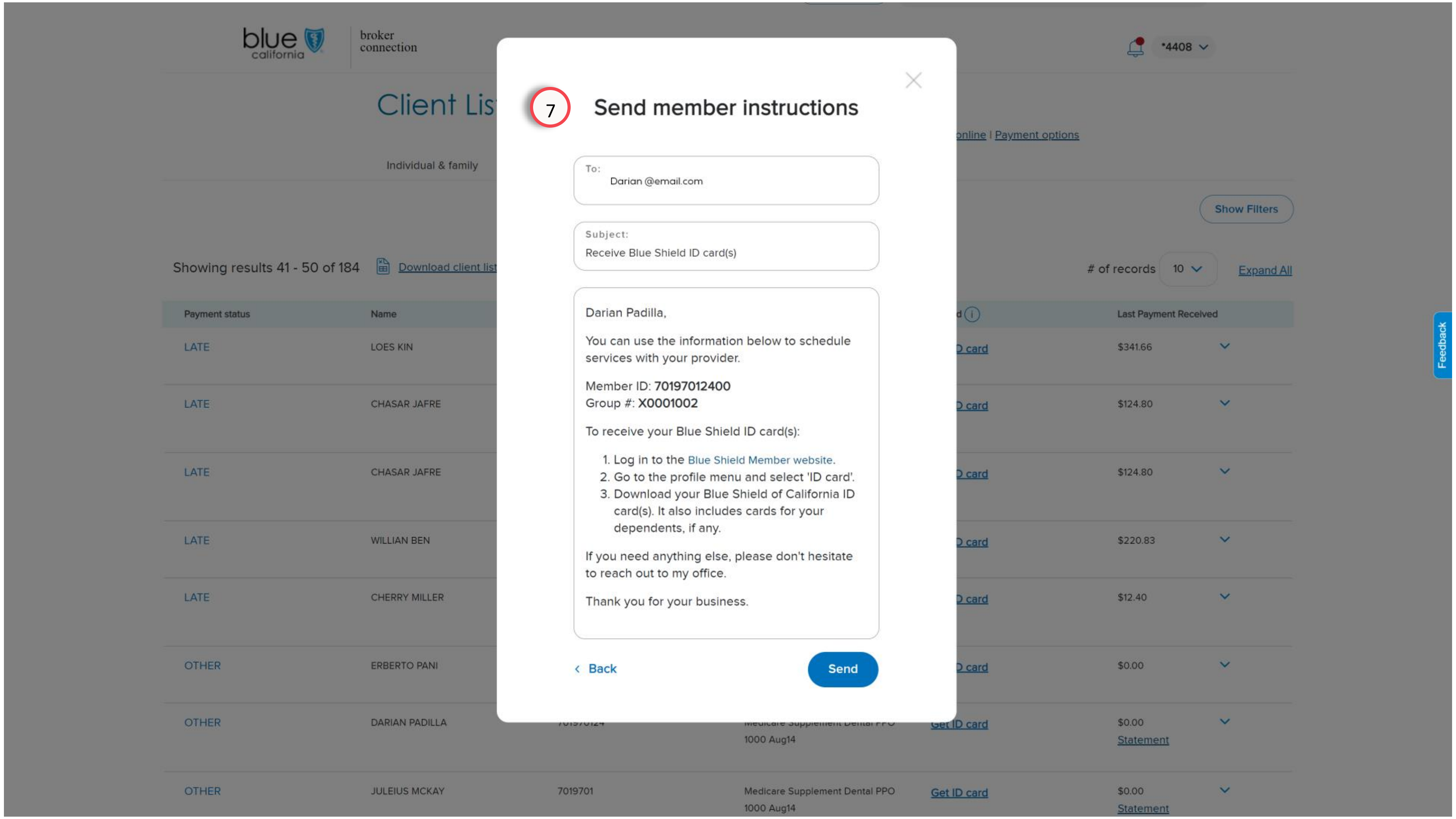
Get ID Cards

Or you can select Send ID card by email and an email form will display with the client's email address prepopulated.

Please note, for security reasons, you can't change the email address.

6. **Add** any additional information to the body of the email and **click send**.

Client List



Get ID Cards

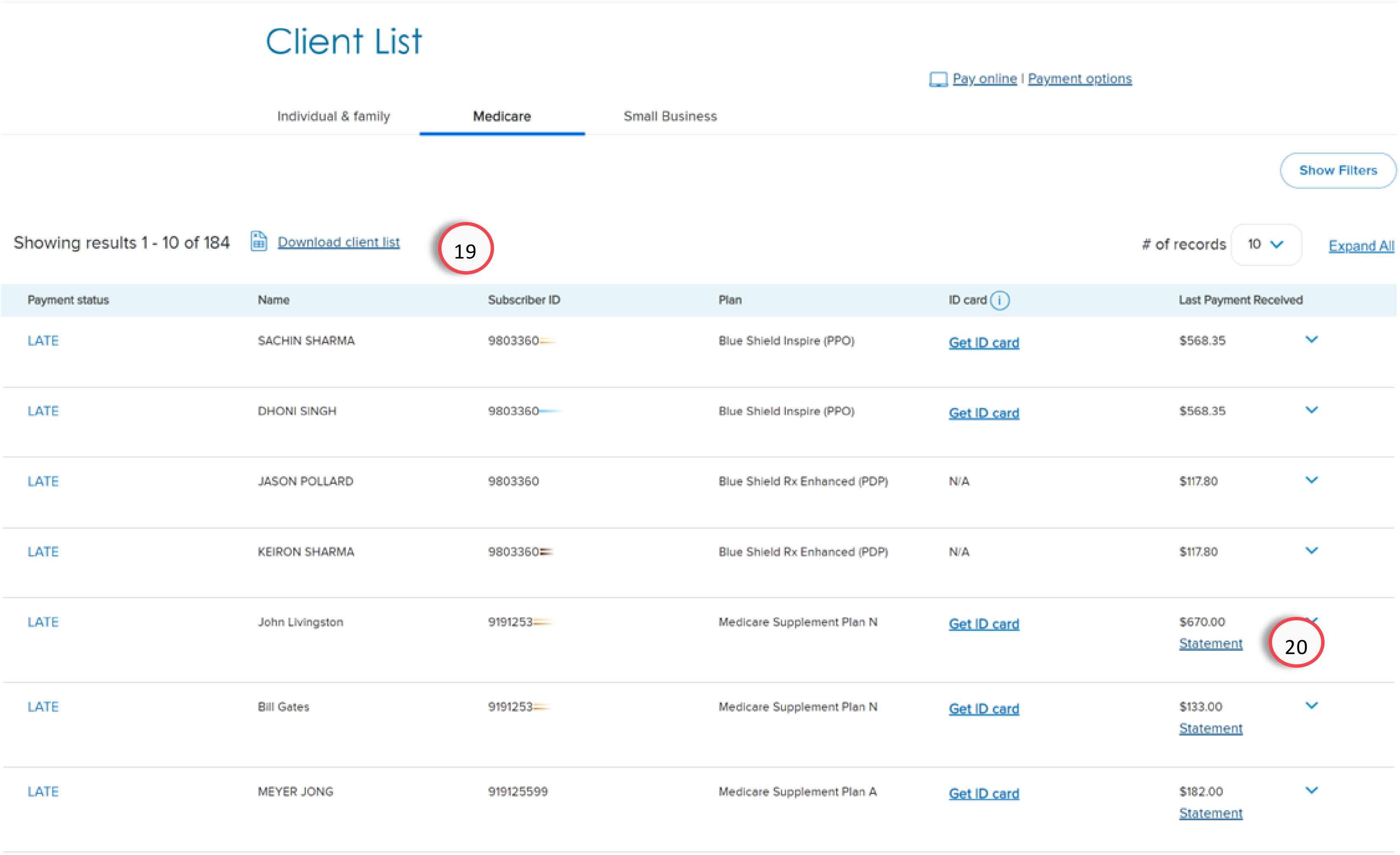
To send via email, select the “Receive ID card via member portal”, and click continue.

A form is displayed with the client’s Member ID and directions for logging to the Member Portal.

Again, for security reasons, you won't be able to send an email to yourself or receive a copy of the email.

7. **Click send**.

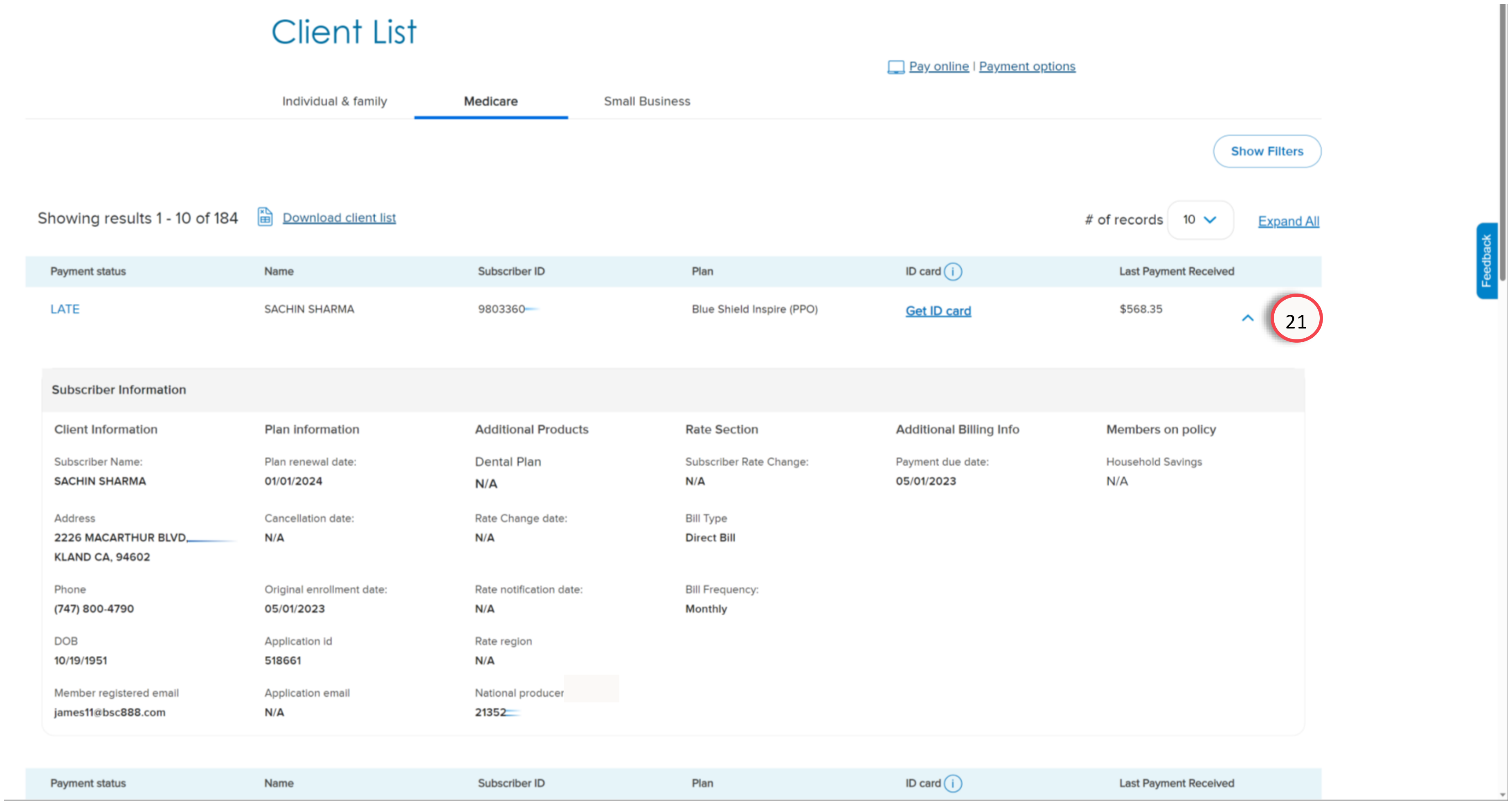
Client List



Download Client List and Statements

19. Client data can be exported to Excel and sorted to your specifications by clicking the **Download client list link**
20. Click **Statement** to view the current statement.

Client List



Viewing Your Client Details

21. Click the arrow to expand the line to view additional account details.

    Click the arrow again to close the expanded details.

The additional details include:

- Demographic information for the client.
- Information regarding rate changes and notifications.
- Original effective dates and cancellation dates for those who have recently left the plan.
- The NPN for the writing agent.

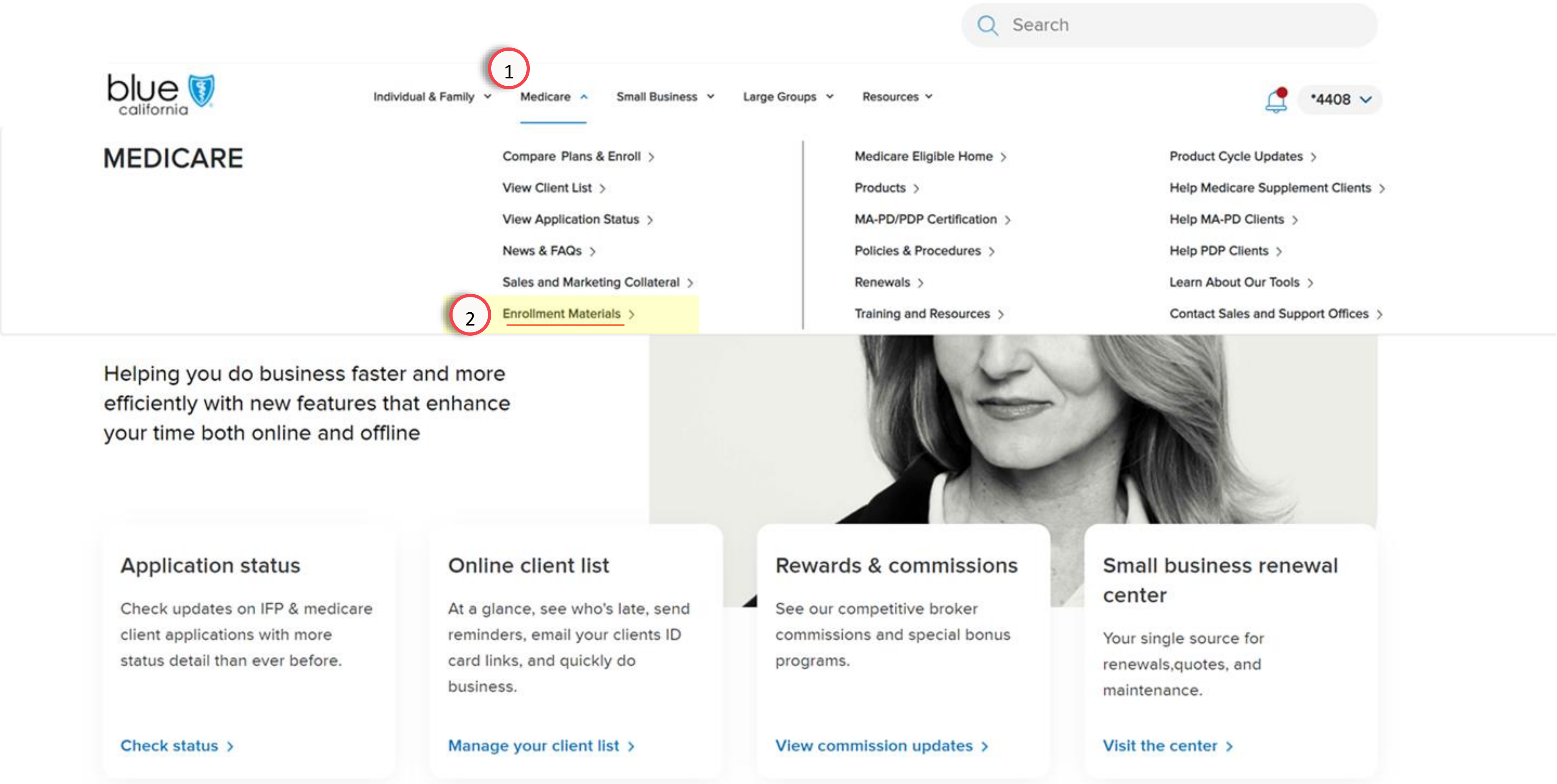
Order Presale Kits

Blue Shield Online Store

View Section

blue california

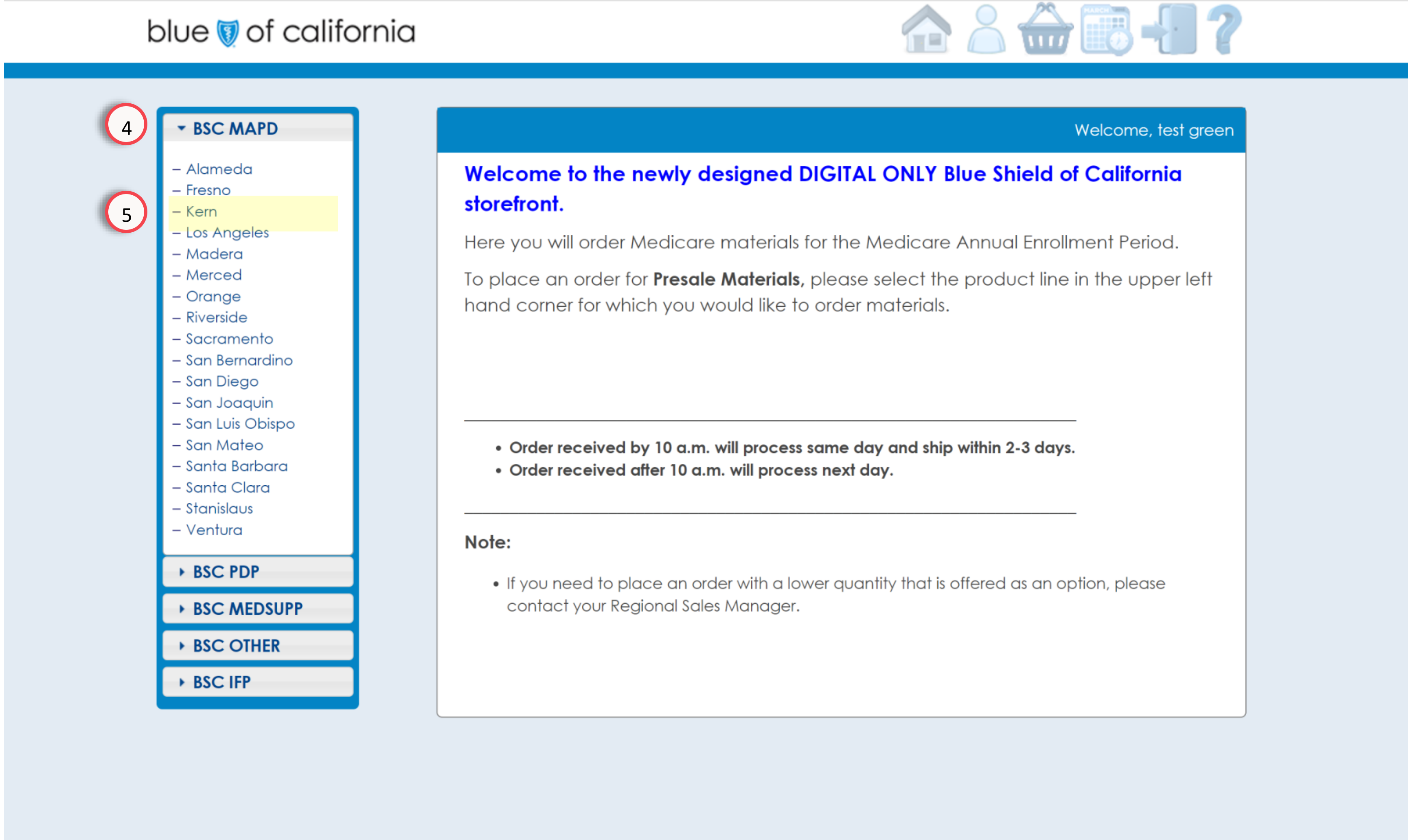
Order presale kits



Ordering Steps

1. Click the **Medicare** tab at the top of the page.
2. Select **Enrollment Materials** for the list.

Order presale kits



Ordering Steps

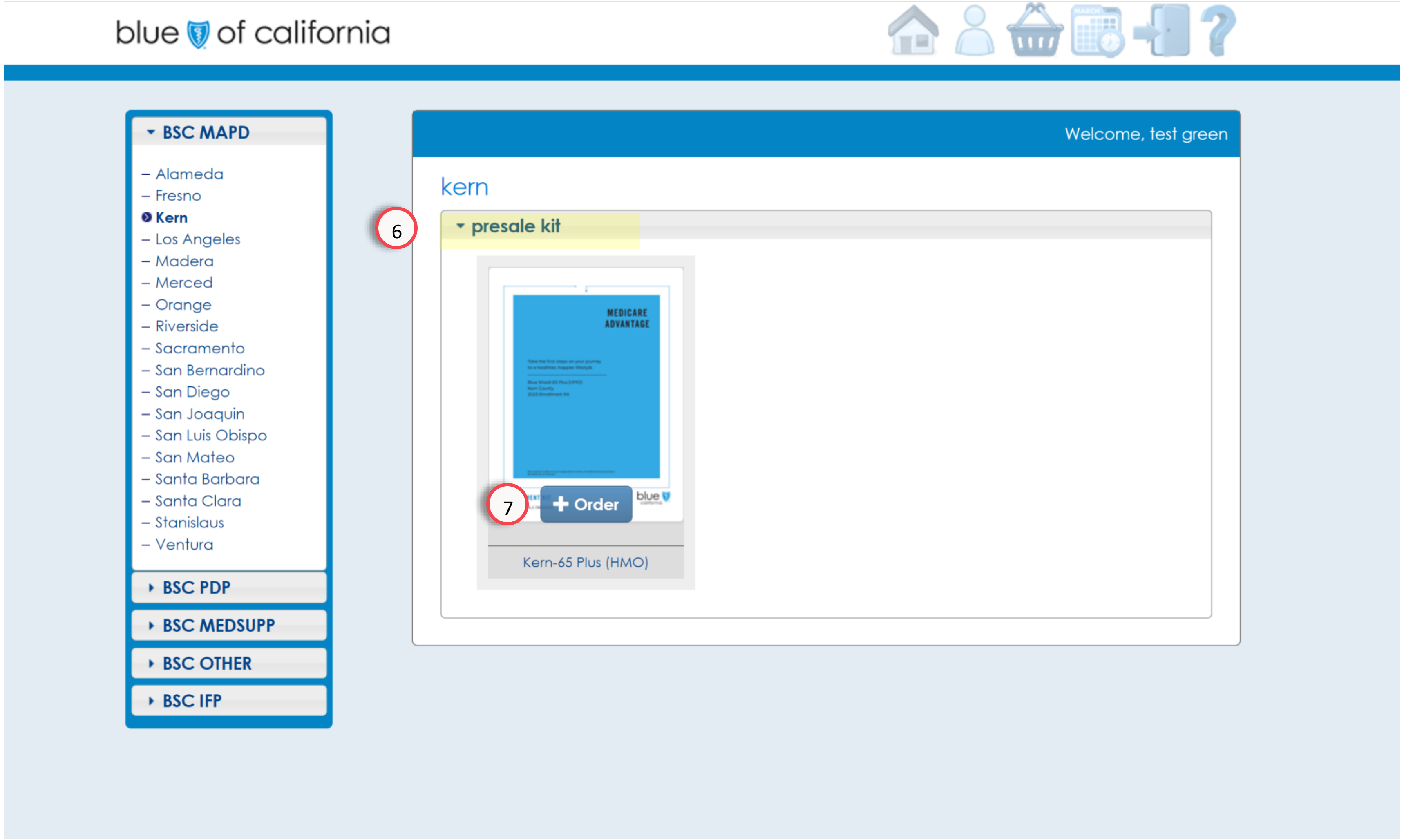
Note:

The default view of the menu is expanded for MAPD.

To expand the other sections, click the triangle.

4. Click on the **Plan type** to expand the tab.
5. Select the **County/Plan** from the list.

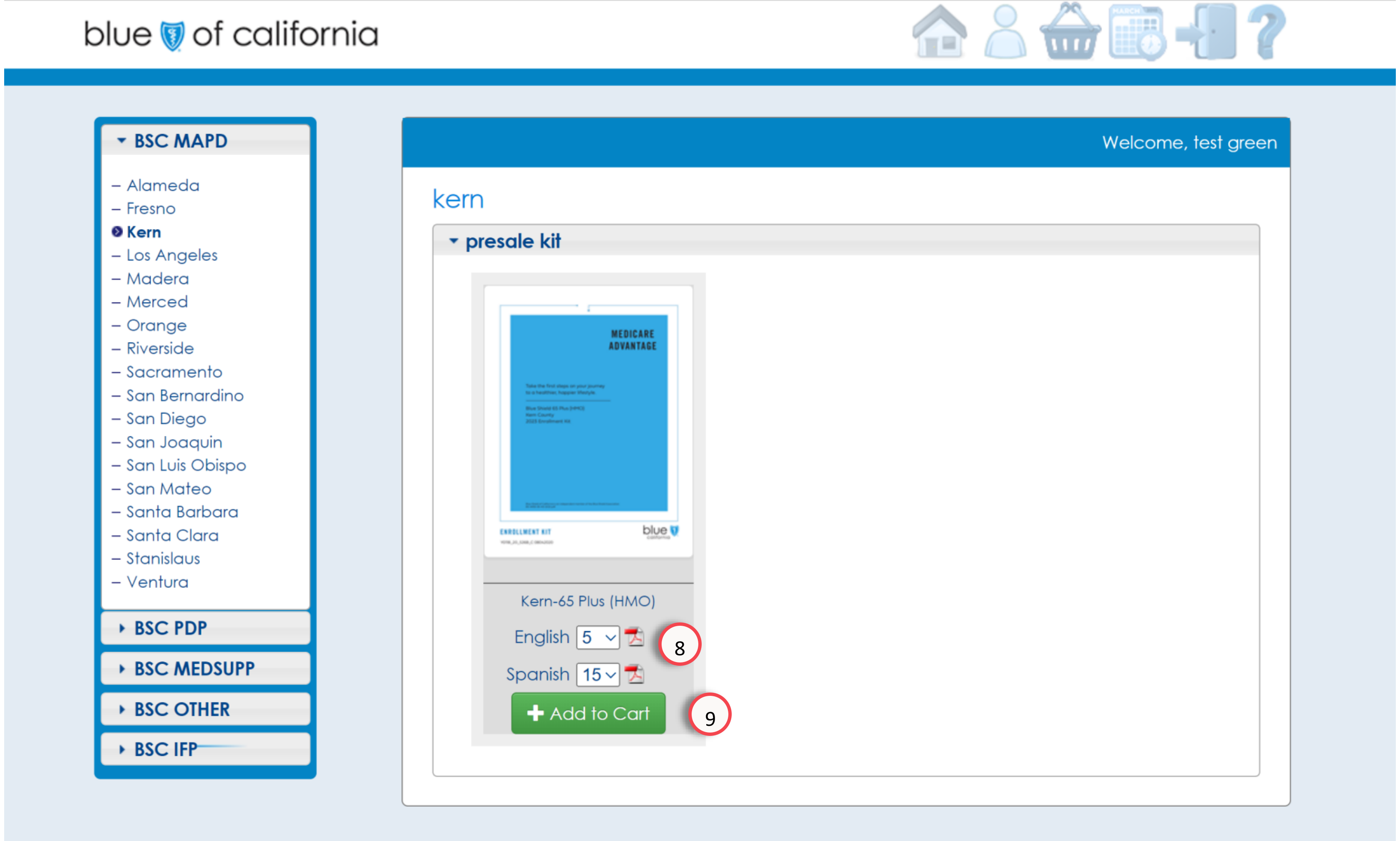
Order presale kits



Ordering Steps

6. Select the type of materials you want to order.
7. Click the **Order** button.

Order presale kits



Ordering Steps

8. Select the **quantity**.

9. Click the **Add to Cart** button.

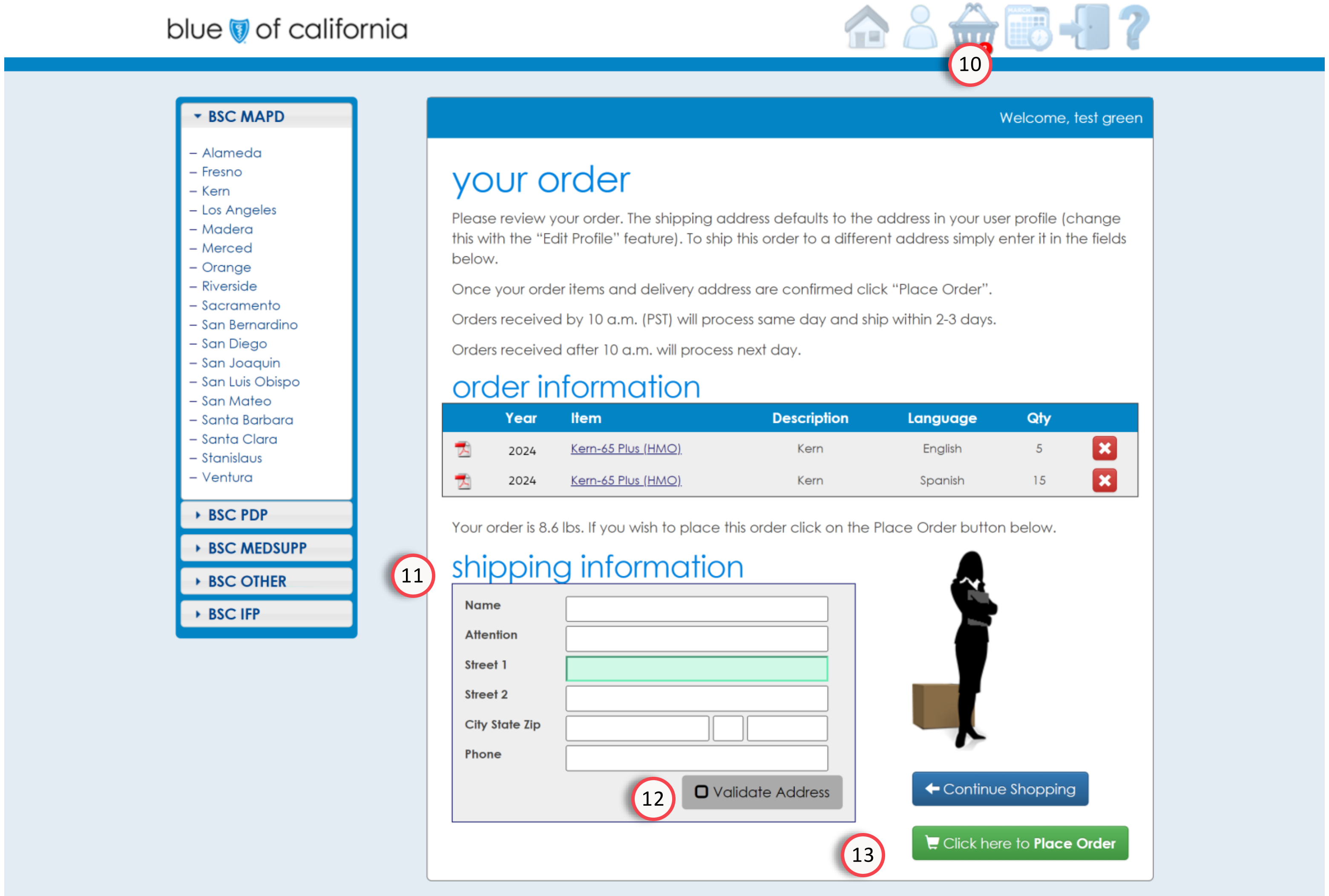
Important:

To ensure your kits ship as soon as they are available, submit separate orders for each language,.

NOTE:

You can click the PDF icon next to the amount field to view and print the information.

Order presale kits

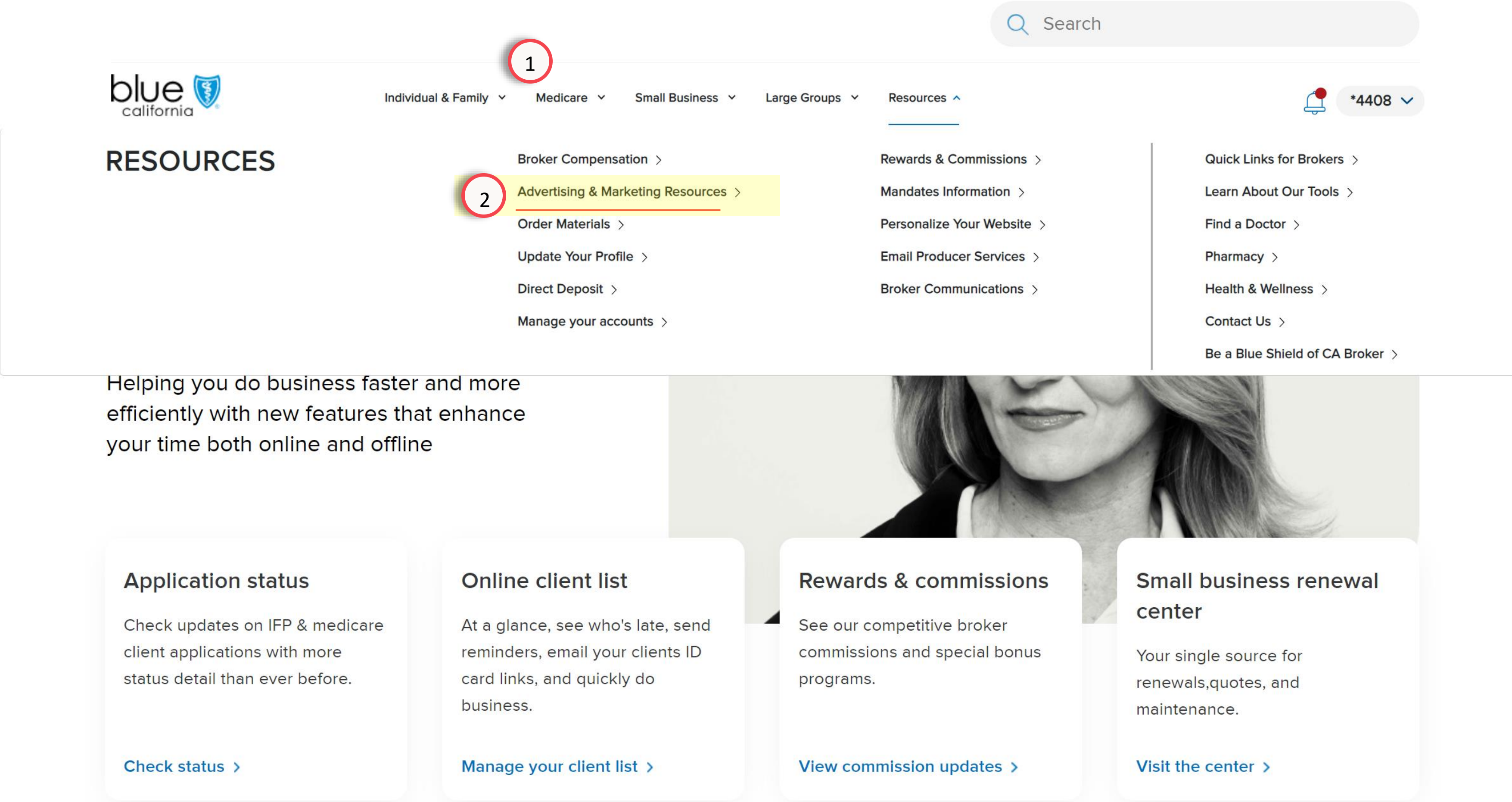


Ordering Steps

10. Click on the **basket** to view the order.
11. Enter the shipping information.
12. Click **Validate Address**.
13. Select **Place Order** to complete the order.


Marketing Materials
Download Advertising Materials
View Section
blue california

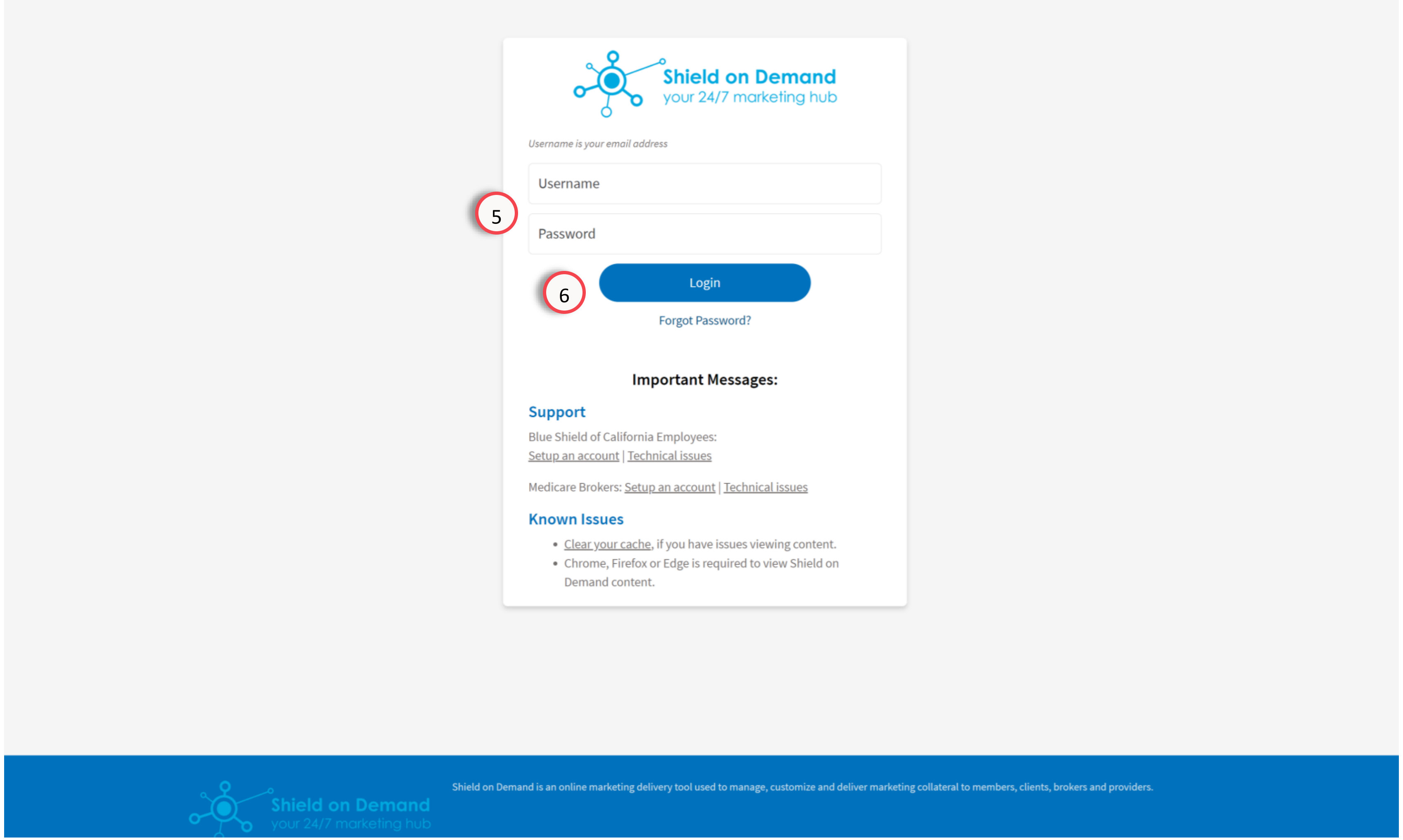
Advertising Materials



Ordering Steps

1. Click the **Medicare** tab at the top of the page.
2. Select **Advertising & Marketing Resources** from the list.

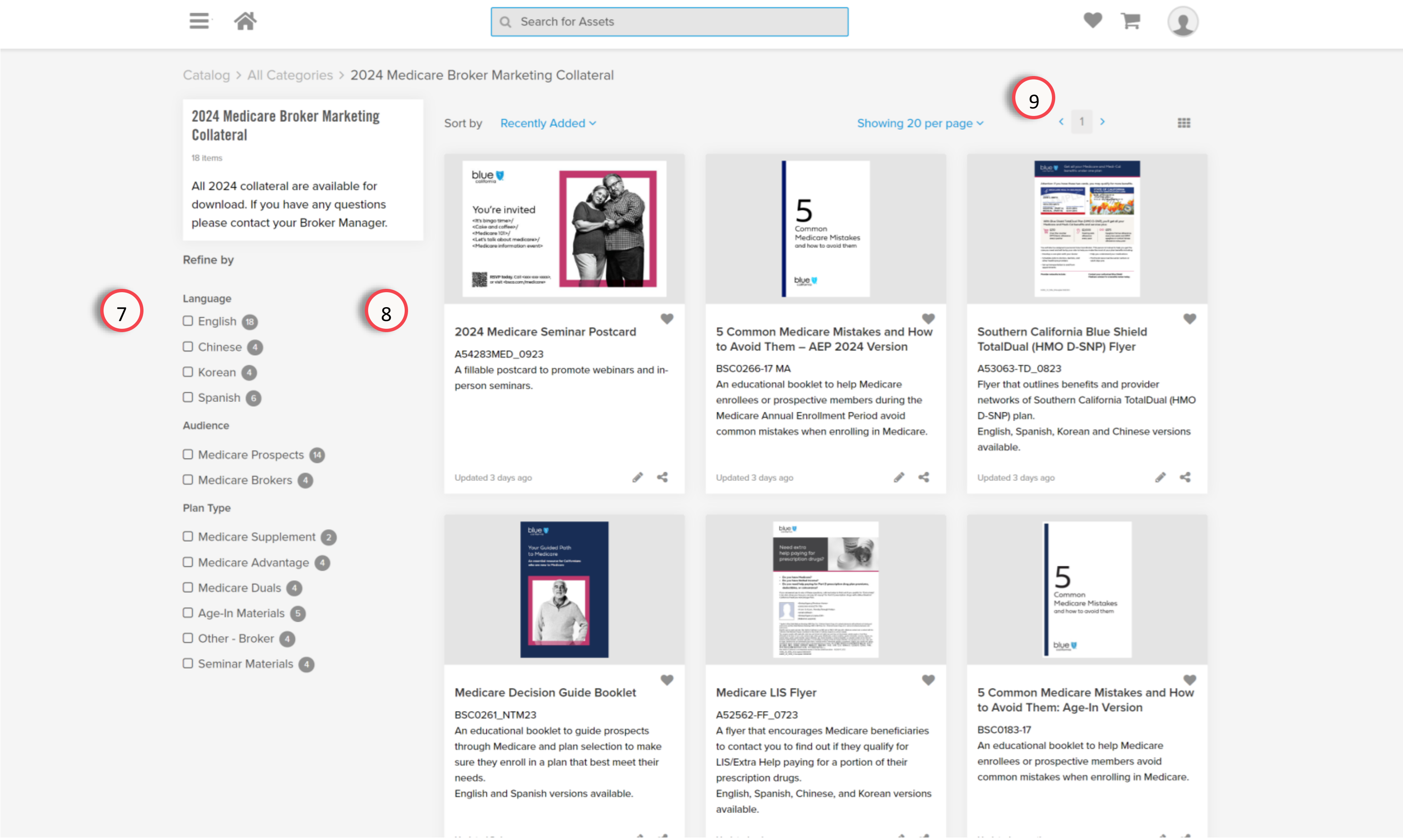
Advertising Materials



Ordering Steps

5. Enter your **Username & Password**
6. Click the **Login** button to continue to the home screen.

Advertising Materials



Ordering Steps

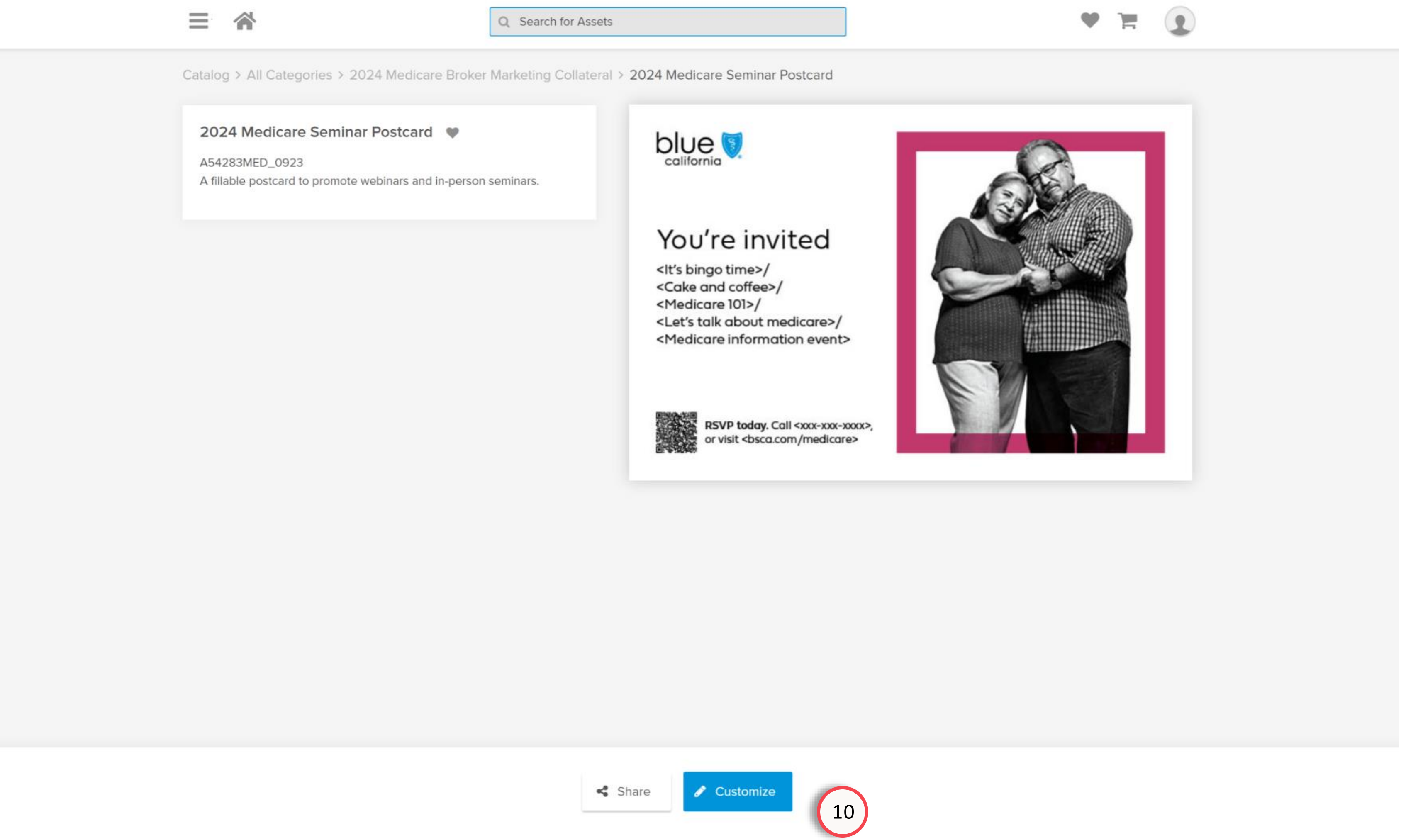
7. Filter the catalog by **selecting one or more options from the left panel**.
8. To select marketing collateral, **click on the item.**
9. Navigate between pages using the **forward and back** buttons.

Pro Tip:

For quicker access to an item, you can click the **heart icon** to save it to your favorites.

You can also click the **pencil icon** on each item card to customize it with your personalized contact information.

Advertising Materials

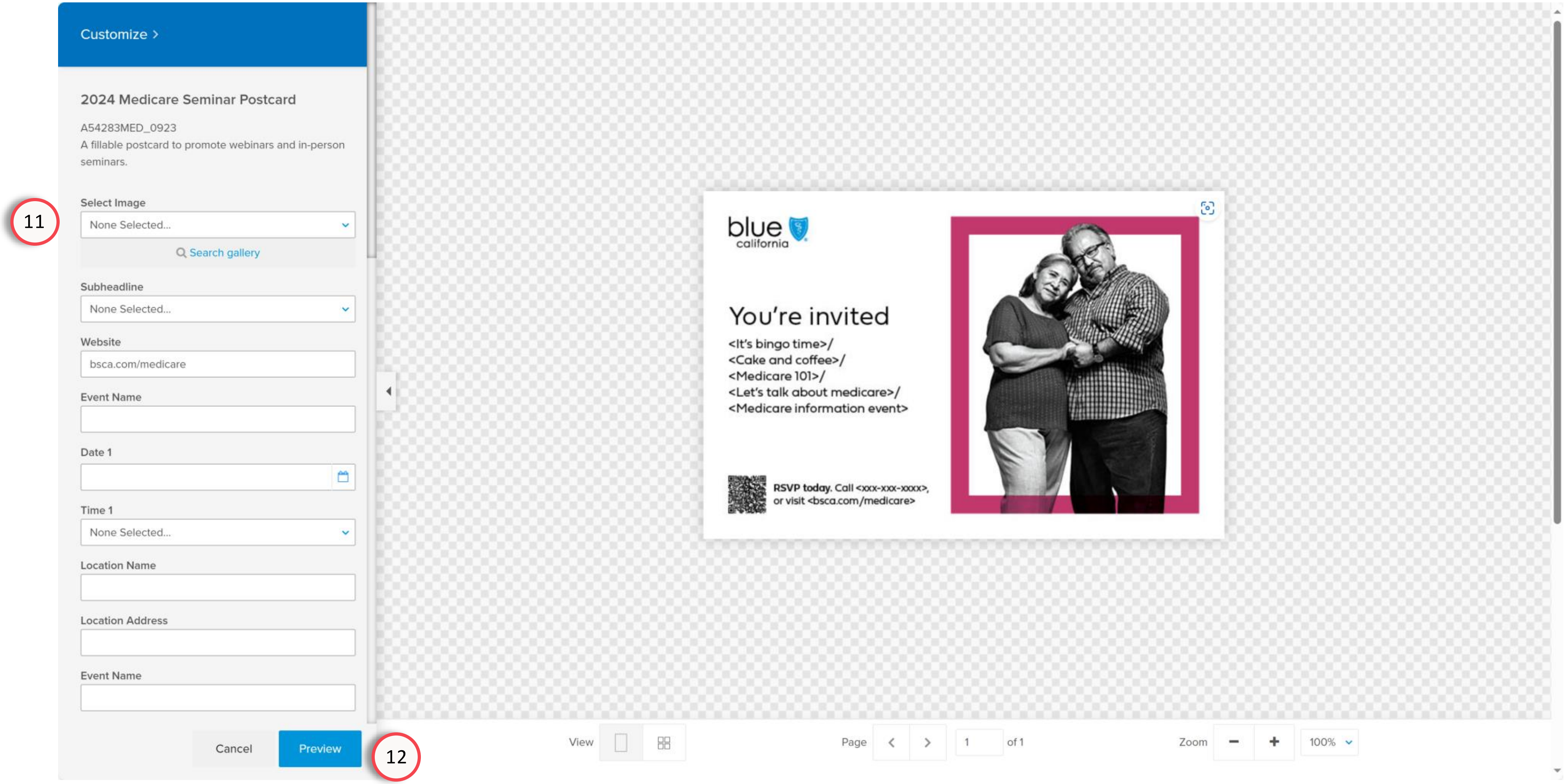


Ordering Steps

A preview of the marketing collateral is displayed.

10. Click the **Customize** button to add your personalized contact information.

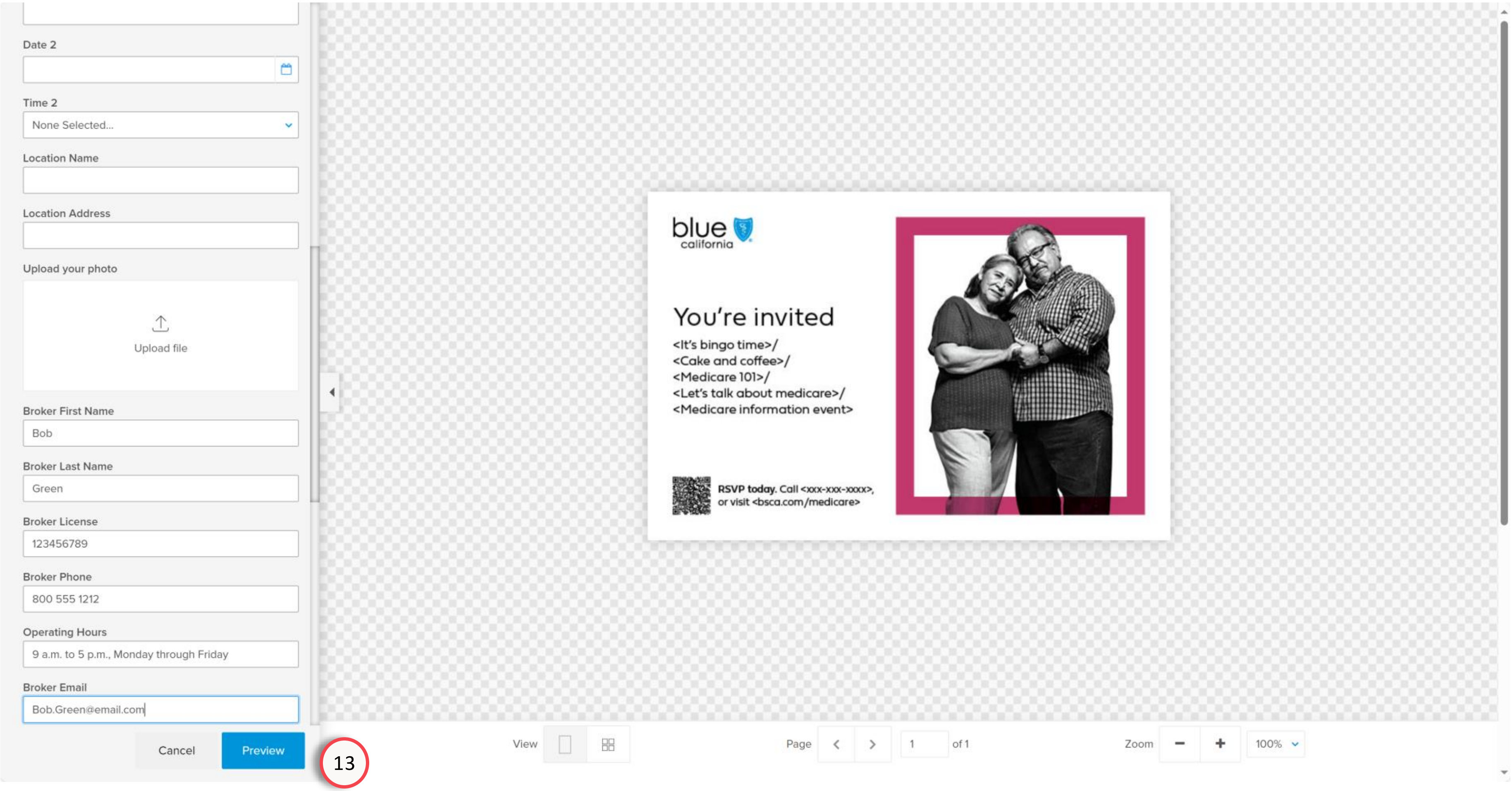
Advertising Materials



Ordering Steps

11. Enter your **information.**
12. Click the **Preview** button to continue to the next screen.

Advertising Materials



Ordering Steps

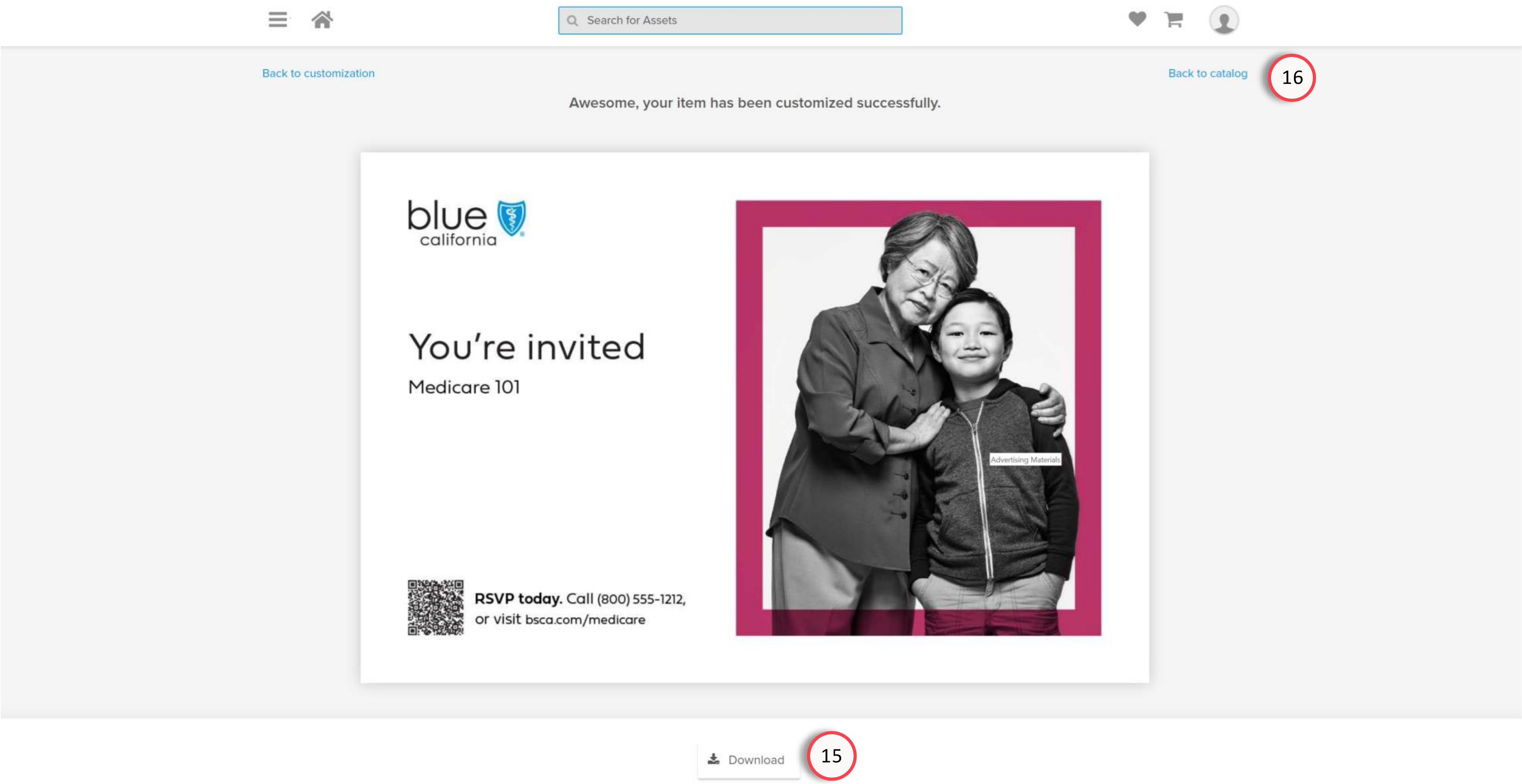
13. To complete the customization and exit the screen, click the **Done** button.

Advertising Materials

Ordering Steps

14. Click the **Done** button save and print your marketing collateral.

Advertising Materials



Ordering Steps

15. Click the **Download** button save and print your marketing collateral.

16. To return to the main screen, click the **Back to Catalog** link at the top right of screen.

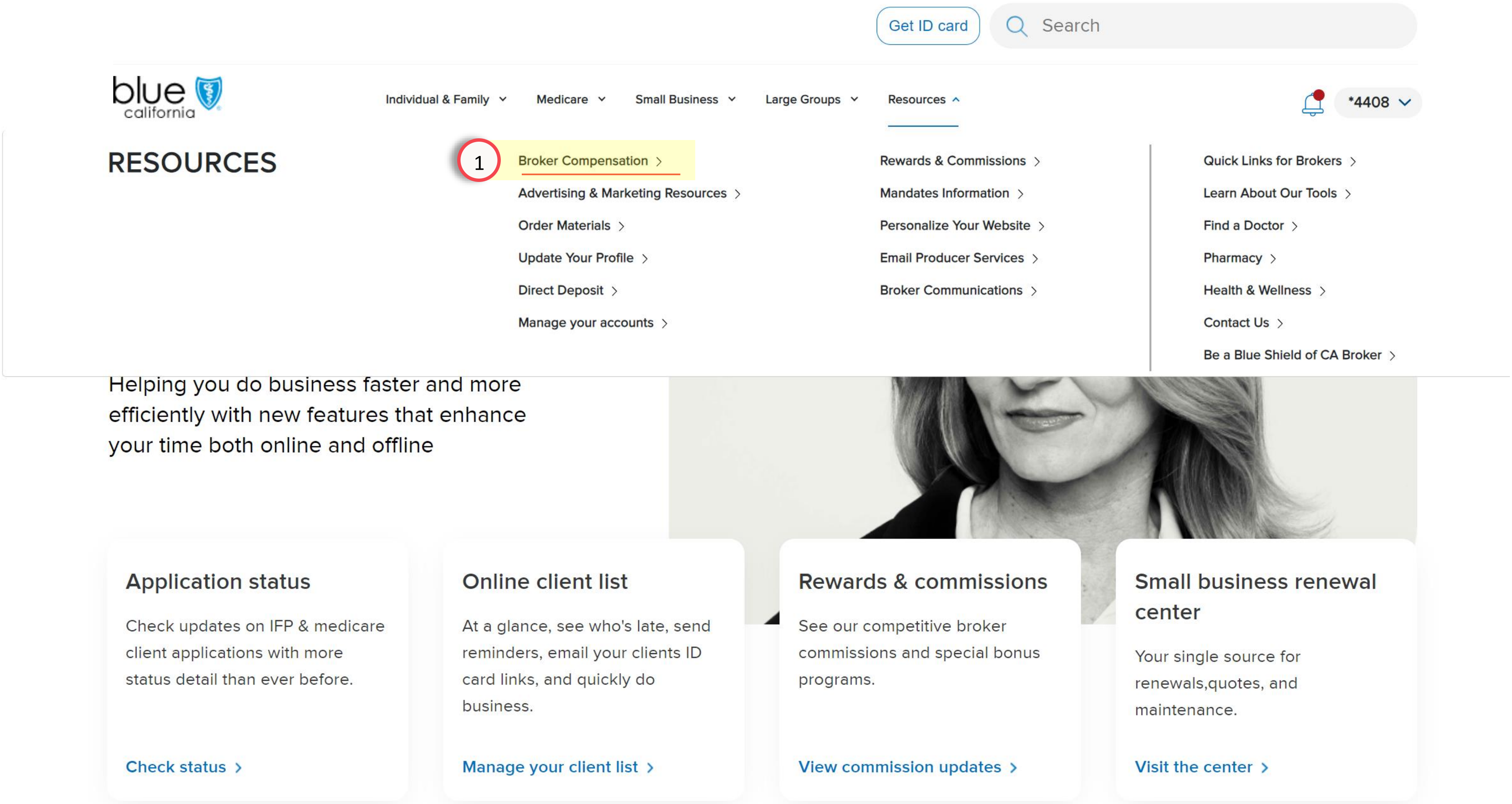
Commission Statements

Broker Connection Site

View Section

blue california

New Commission Statements



Accessing Commission Statements

Under **Resources**, you can access your commission statements.

1. Click **Broker Compensation**

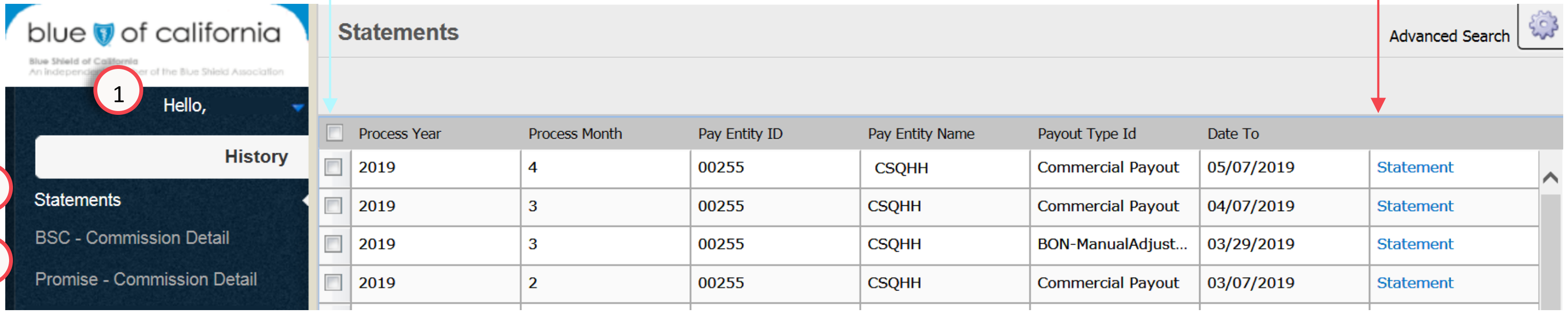
Check Out All The Features…

Statement Detail Extract

Select a statement to view "Statement Detail" screen, and download a .xls/.csv data extract for that statement period.

PDF Statement!

Click to download.



Commission Detail Report

Provides commission details for sub-brokers/writing agents who are being paid through their agency and not directly by Blue Shield.

"Pay Entity ID"

System-assigned producer ID to replace TIN on statements.

Overview

1. **Hello, [Broker Name]:** This option allows brokers to exit the tool while still remaining in Producer Connection. The tool will automatically log brokers out of the Broker Compensation Tool after 10 minutes of inactivity but will still be logged-into PC.
2. **Statements Detail:** The "home page" automatically defaults to the Statements webpage where brokers can select, search, view, print, and download easy-to-read PDF versions of their statements.
3. **Commission Detail:** The Commission Detail webpage allows sub brokers/writing agents to search for commission information by month/year so they can view the details of a sale they participated in but did not receive a statement for the month.

New Commission Statements (Broker Only Statement)

IMCCK GCII IQKIKBQIG IKA
QKAKMIKBC ACMMQBCA, QKB.
Producer ID# 0012
Producer NPN# 123456789

Commission Statement

Statement Date: 11/16/2023

Blue Shield of California

Medicare Supplement Commissions

Writing Producer 0012 **KRUUK KUGB BGKGKKGGK GKD GKDERGKKU DURGGKUD, GKK.** **NPN 123456789**

Group Number	Subscriber ID	Customer Name	Product	Effective Date	Period	Gross Premium	Base Premium*	Commission Rate	Commission Paid
X000	909	George, Clark	Med Supp	09//2022	09//2023	$598.00	$598.00	10.00%	$ 59.80
X000	909	George, Clark	Med Supp	09//2022	09//2023	$598.00	$598.00	10.00%	$ 59.80
X000	909	George, Clark	Med Supp	09//2022	09//2023	$598.00	$598.00	10.00%	$ 59.80
X000	909	George, Clark	Med Supp	09//2022	09//2023	$598.00	$598.00	10.00%	$ 59.80
X000	906	KKKD, DKKLD	Med Supp	08//2022	08//2023	$148.00	$148.00	23.00%	$ 34.04
X000	906	KKKD, DKKLD	Med Supp	08//2022	08//2023	$148.00	$148.00	23.00%	$ 34.04
X000	906	KKKD, DKKLD	Med Supp	08//2022	08//2023	$148.00	$148.00	23.00%	$ 34.04
X000	909	Samuel, Nick	Med Supp	08//2022	08//2023	$579.00	$579.00	10.00%	$ 57.90
X000	909	Samuel, Nick	Med Supp	08//2022	08//2023	$579.00	$579.00	10.00%	$ 57.90
X000	909	Samuel, Nick	Med Supp	08//2022	08//2023	$579.00	$579.00	10.00%	$ 57.90
X000	909	Test, Feb	Med Supp	08//2022	08//2023	$679.00	$679.00	10.00%	$ 67.90
X000	909	Test, Feb	Med Supp	08//2022	08//2023	$679.00	$679.00	10.00%	$ 67.90
X000	909	Test, Feb	Med Supp	08//2022	08//2023	$679.00	$679.00	10.00%	$ 67.90
							Total		**$718.72**

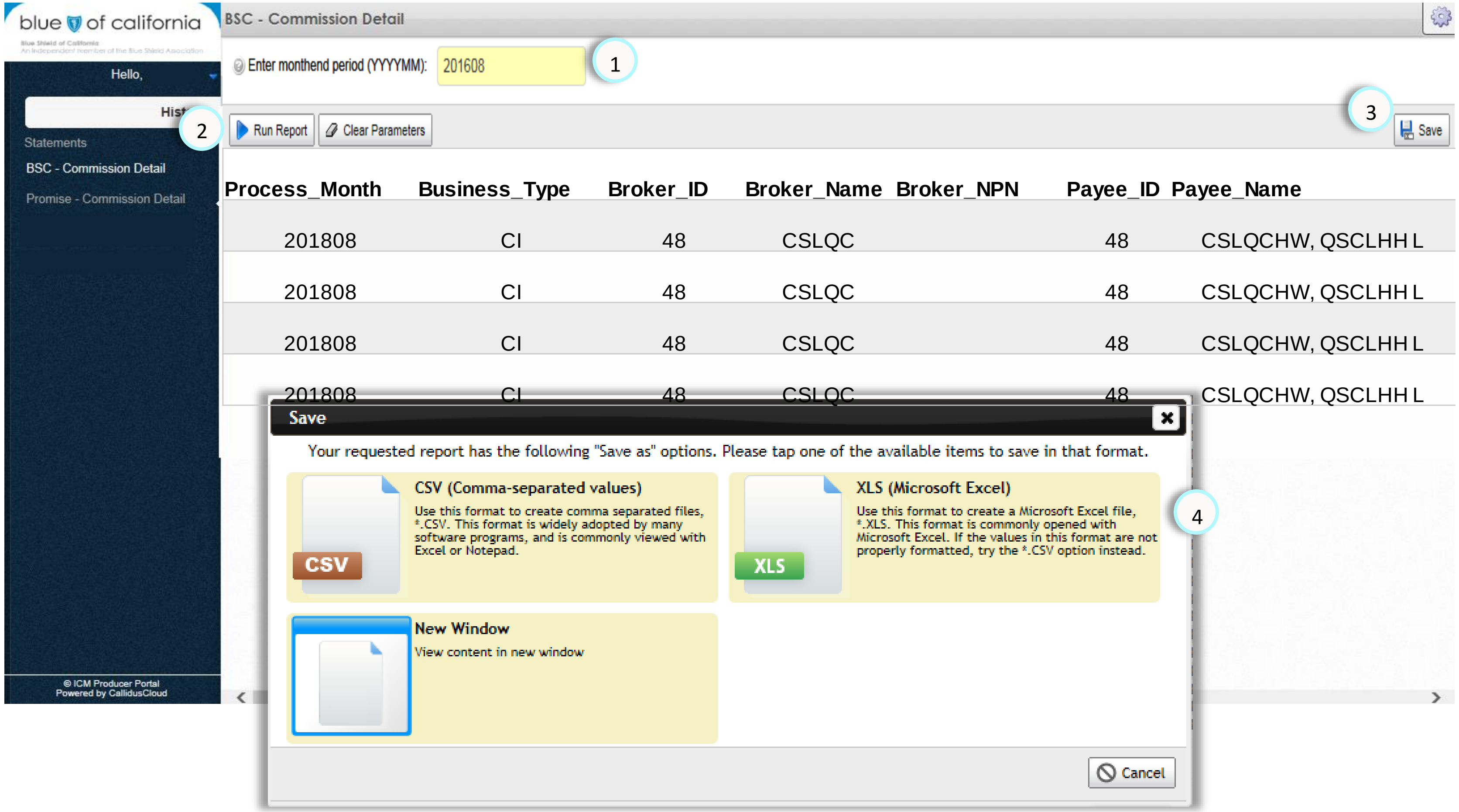
Viewing Detail Page

All your Senior business is now located in **one statement!**

Note

Agents contracted with both Blue Shield and Blue Shield Promise, will need to contact their FMO/Agency **for all Blue Shield Promise** related business.

Viewing Commission Detail



Viewing Commission Detail

The Commission Detailed Statements provide a list of commissions paid to the writing agent for a given period (i.e. Jan, Feb, etc.).

1. Enter the year and month where dues were received (08/2016 earliest).
2. Click Run Report.
3. To export the information, click the **Save** button.
4. Select a format to save the exported information.

Note

Transactions where commissions are paid to an **FMO/Agency** will not be visible to the writing agent.

Commission Schedule

2023 Broker Payout Calendar

*Commission statements will be available on the below highlighted dates. Payment will be received within 2-5 days from the below highlighted dates.

January

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	**11**	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	**9**	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	**9**	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

April

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	**11**	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	**9**	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	**9**	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

July

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	**12**	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	**9**	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

September

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	**12**	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	**10**	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	**9**	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	**11**	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

All payment dates are subject to change.

Blue Shield of California is an independent member of the Blue Shield Association A50360-BSC_0922

blue california

Accessing the Commission Schedule

Commissions are paid out during the **second week** of each month.

Note:

Once released, payment is delivered within 2-5 business days.

Commissions are based on paid member premiums. Premiums received after the commission cutoff date will be paid on the next commission payout date.

Resources

Broker Connection Site

View Section

Resources

- Broker Connection Site: https://www.blueshieldca.com/producer
- Shield on Demand Site: http://www.shieldondemand.com/
- Consumer Application Status Site: https://www.blueshieldca.com/brokerwebapp/medicareProspectAppStatus

Contact Us

Blue Shield Producer Services
Phone Number:

1-800-559-5905

Email:
seniormarketsproducer@blueshieldca.com