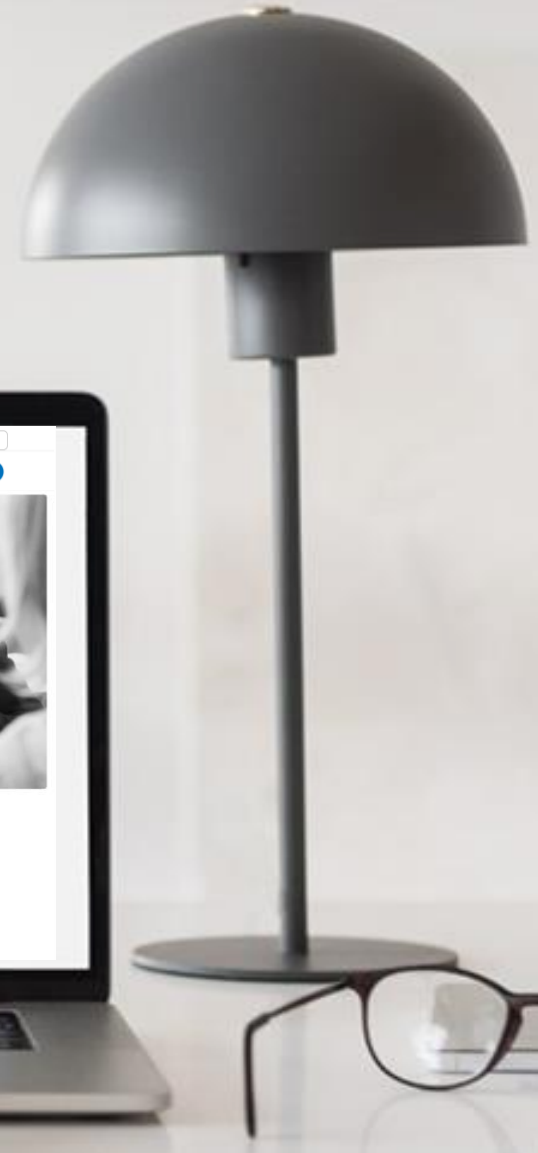
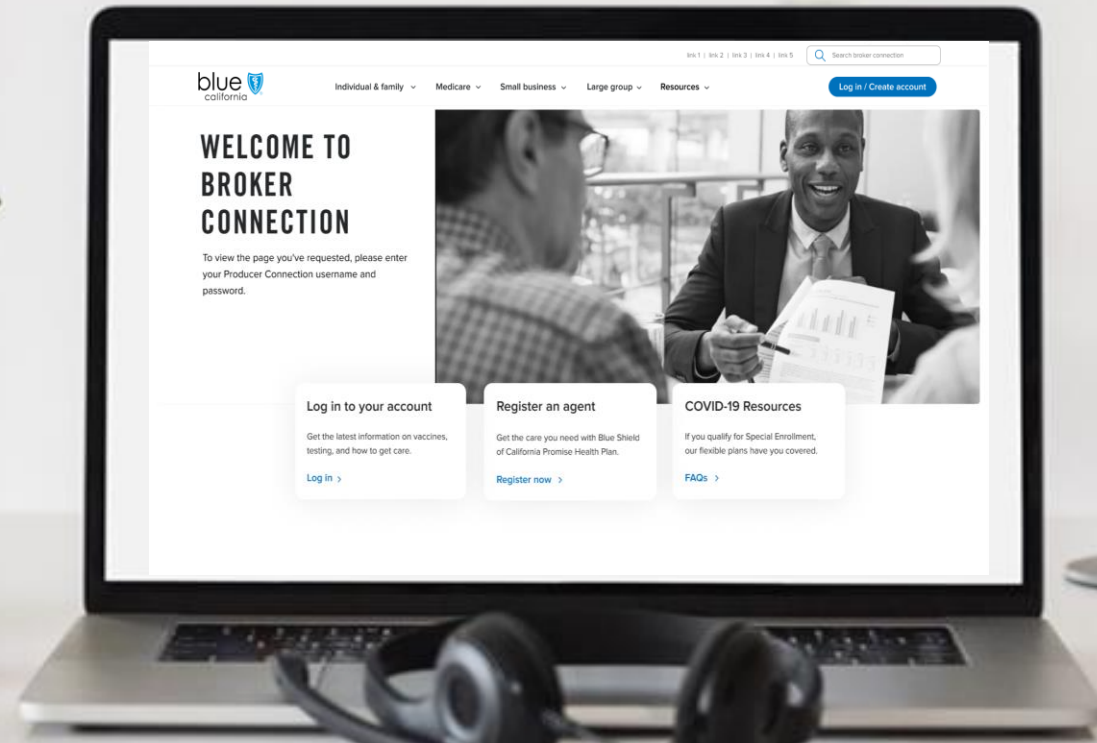


Broker Connection Site

Quick Reference Guide

Y0118_23_687A_C 10022023
H2819_23_687A_C 10022023

[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.

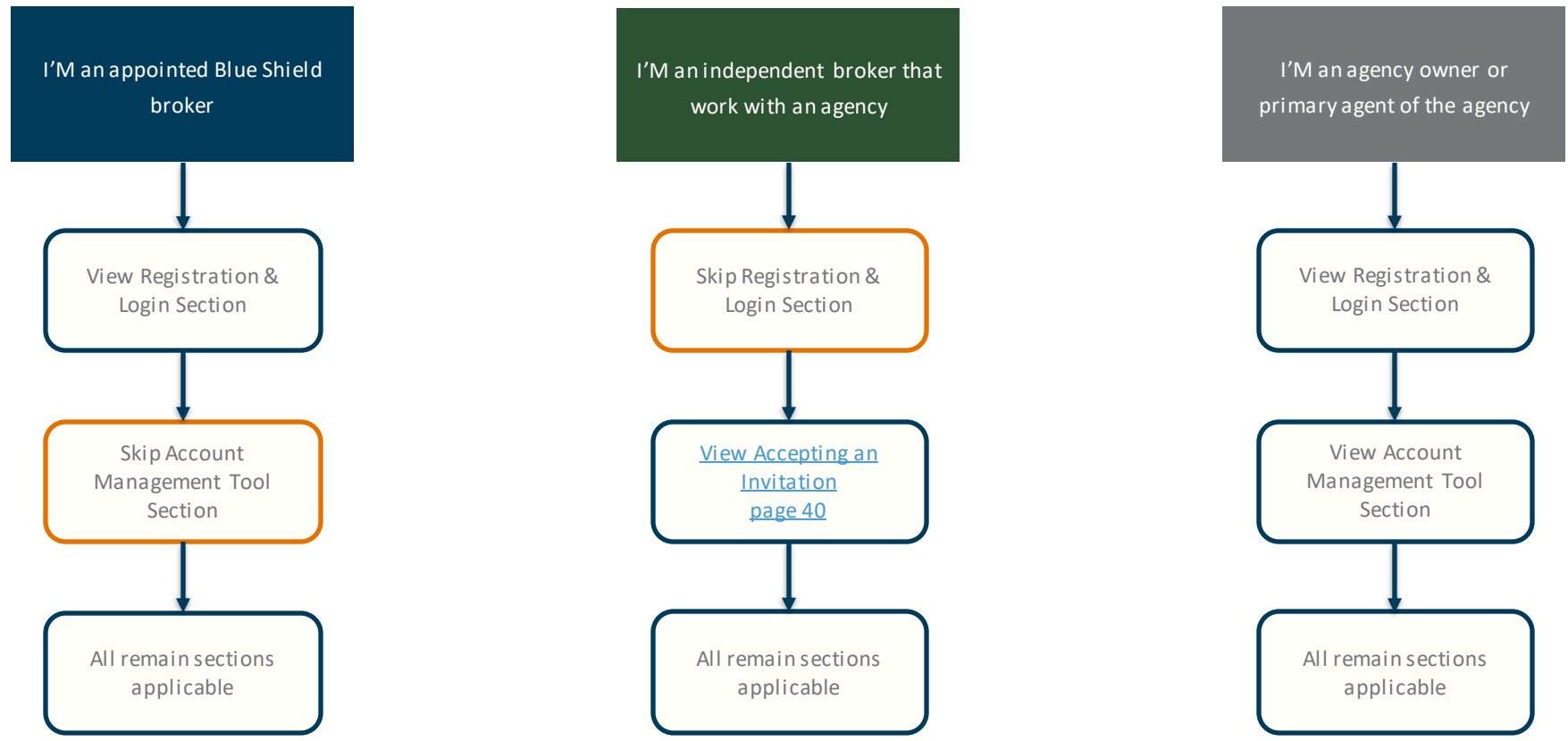
By default, if you are an appointed Blue Shield broker that is registering for an account for the first time and is not affiliated with an agency, your account profile is automatically set to the highest profile – "Primary Agent role".

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



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

The screenshot shows the top navigation bar with a search bar and a 'Log In or Register' button. Below the navigation, there's a 'WELCOME TO BROKER CONNECTION' section with a 'Log in to your account' button. To the right is a large image of a woman. Below that is a 'Become a Blue Shield broker' section with a 'Get appointed' button. A red arrow labeled 'Option 2' points to the 'Log In or Register' button, and another red arrow labeled 'Option 1' points to the 'Get appointed' button.

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.

Get the most from your Broker Connection account

Broker Connection Registration Experience

Option 1: Apply for Appointment

Register


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

WELCOME TO

BROKER CONNECTION

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

[Log in to your account](#)



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two step appointment process on our resources page](#).

Join us and watch your business grow.

[Get appointed](#) **1**

Get the most from your Broker Connection account

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.



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.



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.



What lines of business do you sell?

Select all that apply.

2

Individual & family plans
✓

Medicare
✓

Small business

Large group

3

< Back

Continue

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.

Tax and license information

Enter the tax ID number (TIN) for your agency or your Social Security number (SSN).

4

Get appointed with Blue Shield of California

Tax and license information

Enter the tax ID number (TIN) for your agency or your Social Security number (SSN).

5

Get appointed with Blue Shield of California

6

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.

Contact information

7

First name* Middle initial

Last name*

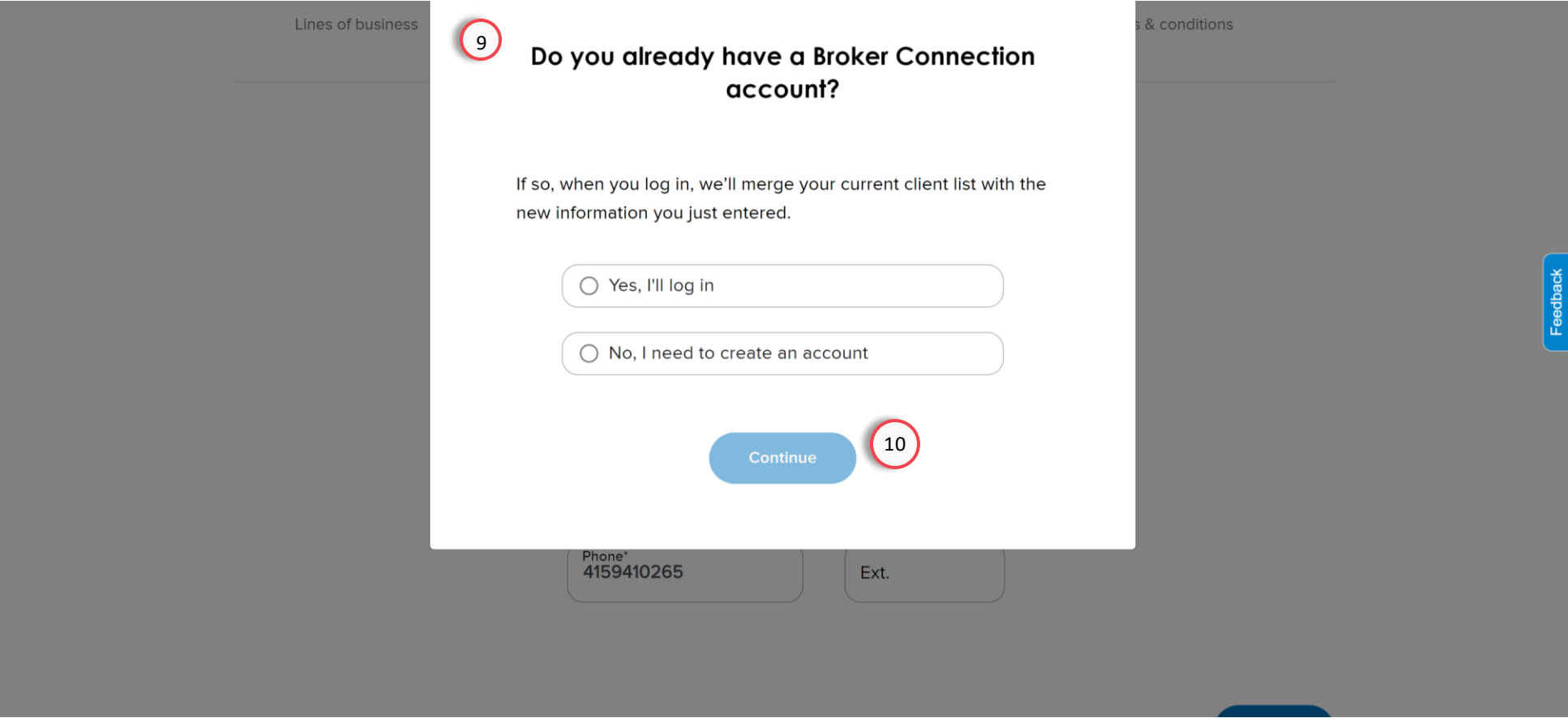
Email*

Phone* Ext.

8

Continue

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



11

Account setup

 Create a username


Your username must have:

- 8-20 characters
- Unique identification
- Numbers and letters only
- No spaces

 Create a password [Show](#) 

Your password must include:

- 8-20 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- A number or symbol (?#!)
- No spaces

 Confirm password [Show](#) 

12

Continue

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



Confirm your account information

To make changes to a section, select the corresponding step above.

Tax and license info

Agency TIN	xxxx
Agency ZIP code	XXXX
DOI license number	XXXX
NPN	

Contact info

Name	Bob Smith
Phone	(415) XXXX XXXX
Phone extension	
Email	XXXX@blueshieldca.com

Account setup

Username	4BobSmtih
----------	-----------

Lines of business

Lines of business	Individual & family plans
-------------------	---------------------------

Feedback

13 Continue

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

[Home](#) > [Create an account](#)



Registration Steps

Review Terms and Conditions information.

14. Scroll down the page to agree to the terms and 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 California is not responsible for any unauthorized disclosure or misuse of Taxpayer Identification Numbers (TINs) or broker identification numbers (PINs).

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.

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



[Home](#) > [Create an account](#)

You're almost done!

Check your inbox. You should have received an email requesting that you confirm your email address. The verification button will expire in 24 hours. Once you've verified your email address, return here and select Close.



If you haven't received your email confirmation, you can [send another one](#).

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



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



Thank you for verifying your email address.
You may now log in to Broker Connection.

Log in

18

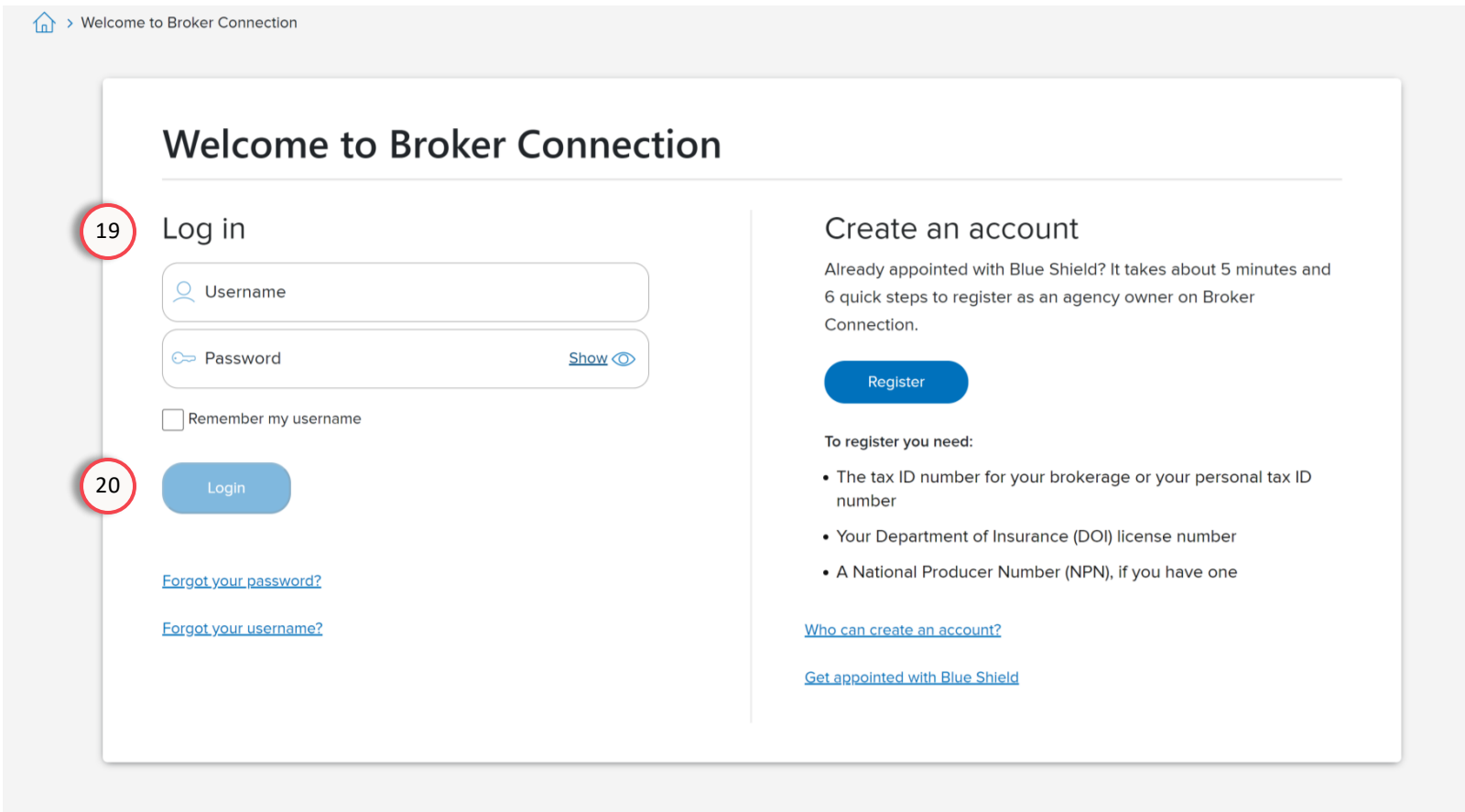
Registration Steps

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.**

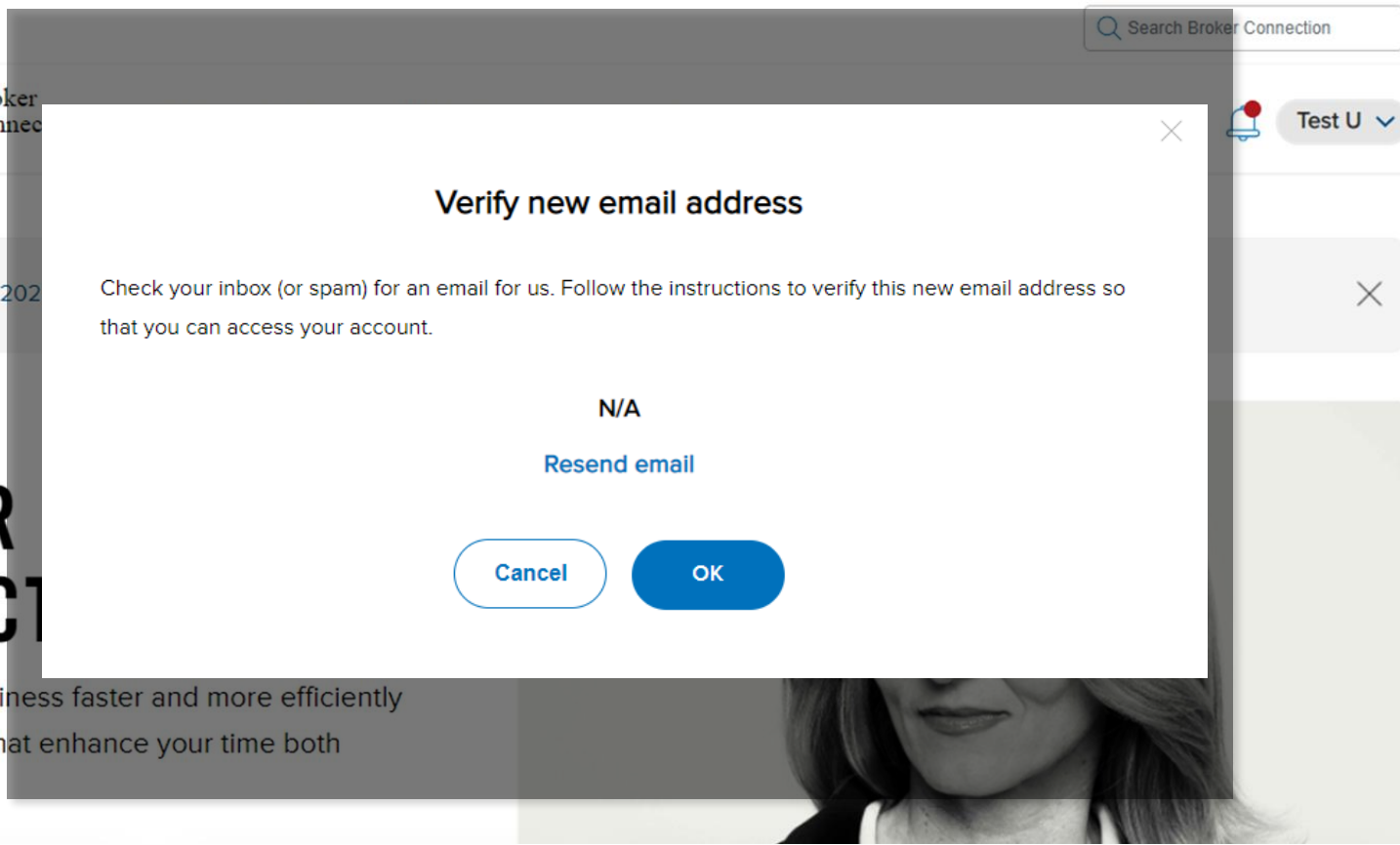
Important

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

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

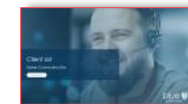
You are now logged into Broker Connection.

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



broker connection

Individual & Family

Medicare

Small Business

Large Groups

Resources

Search Broker Connection

Rohit S



Access the 2022 Broker Commission Payout Schedule.



WELCOME TO

BROKER CONNECTION

Helping you do business faster and more efficiently with new features that enhance your time both online and offline



Application status

Check updates on IFP &

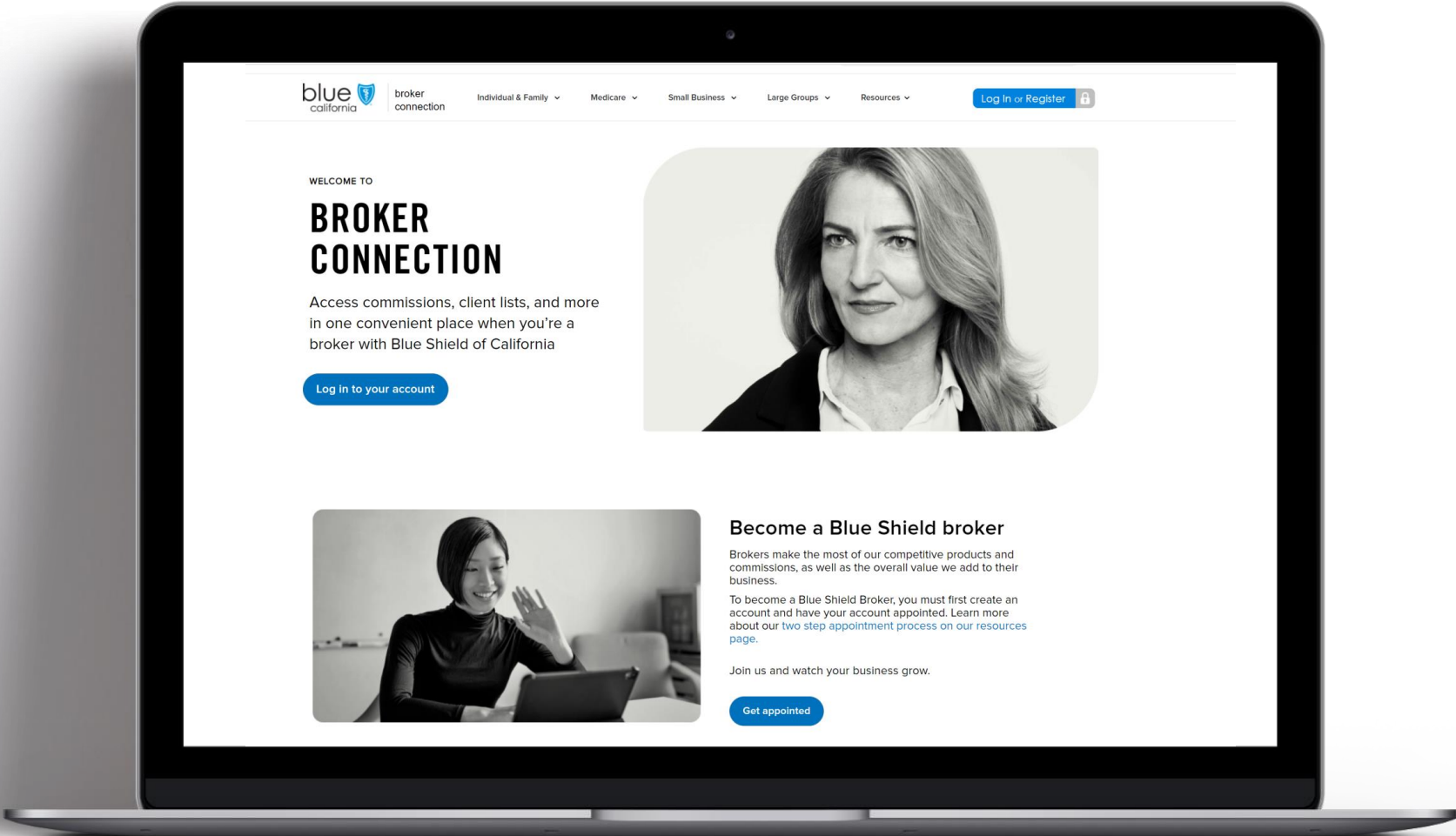
Online client list

At a glance, see who's late,

Rewards & commissions

Small business renewal center

2- Step Verification



WELCOME TO
BROKER CONNECTION

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

Log in to your account



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. [Learn more about our two step appointment process on our resources page.](#)

Join us and watch your business grow.

Get appointed

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.

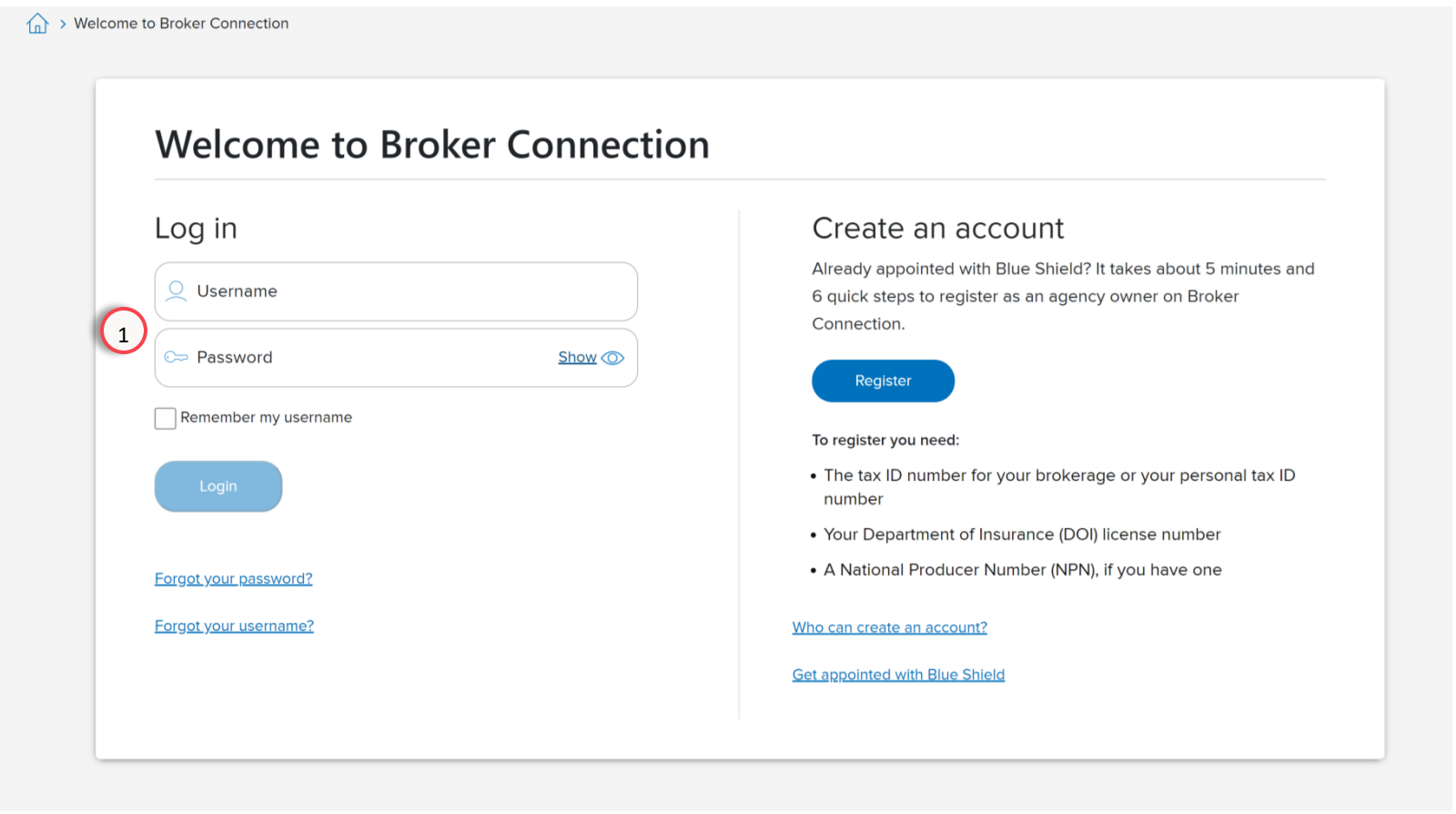
Key Points

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-digit code 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



Log in with 2-step verification

We've sent a verification code to (mr****@blueshieldca.com).

Enter that code here.

2

Code

Confirm

Time remaining 09:50

i **Didn't get the code?**

- There may be a delay in processing. Wait a few minutes and check again.
- Check your spam folder
- [Resend code](#)

Need help? Contact Producer Services at (800) 559-5905



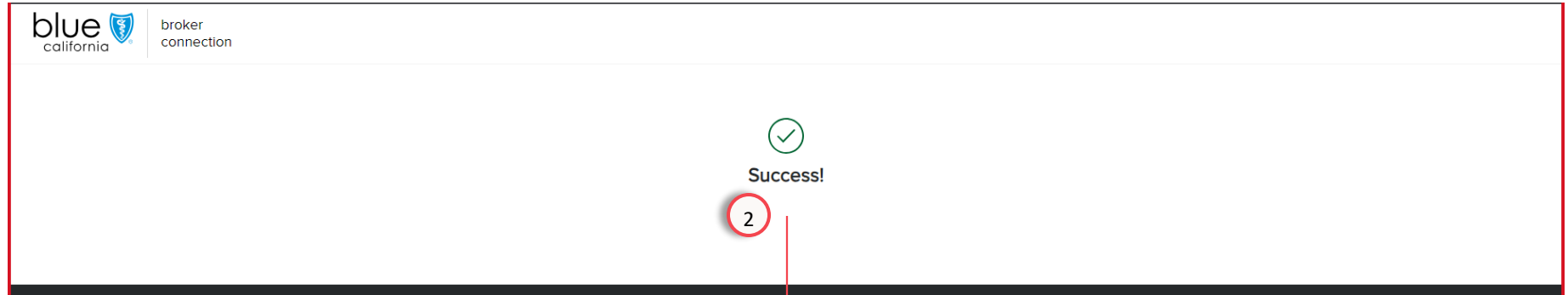
A one-time passcode is sent to your email address.

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

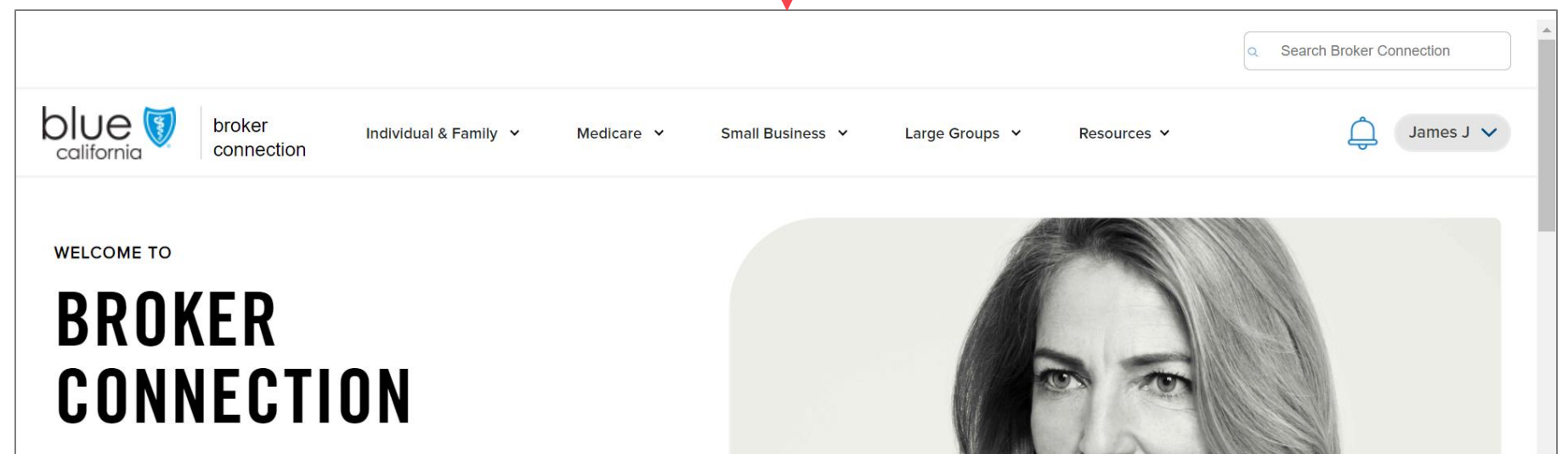
If you need to have the code sent again, click the **Resend Code link** at the bottom of the page.

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

Completing a 2-Step Verification



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





Primary Agents & Agency Owners

Account Management Tool

[View Section](#)

Introducing Broker Connection Account Management Tool

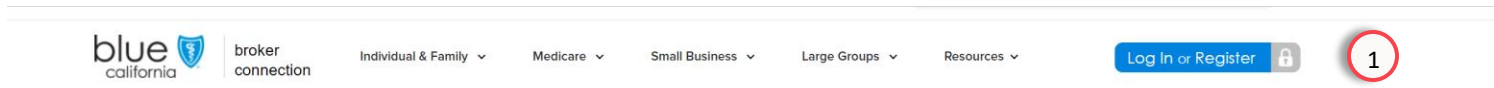
Primary agents and agency owners will have administrative control for their account access to Broker Connection using the new “Account Management Tool” features.

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



WELCOME TO
BROKER CONNECTION
Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California
[Log in to your account](#)



Become a Blue Shield broker
Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.
To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two step appointment process on our resources page](#).
Join us and watch your business grow.
[Get appointed](#)



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.

Home > Welcome to Broker Connection

Welcome to Broker Connection

2 Log in

[Show](#)

Remember my username

[Login](#)

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

Already appointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner on Broker Connection.

[Register](#)

To register you need:

- The tax ID number for your brokerage or your personal tax ID number
- Your Department of Insurance (DOI) license number
- A National Producer Number (NPN), if you have one

[Who can create an account?](#)

[Get appointed with Blue Shield](#)

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.

The screenshot shows the 'Resources' menu in the Broker Connection site. The 'Resources' tab in the top navigation is circled in red with the number '3'. Below it, the 'Manage your accounts' option is highlighted with a red box and circled with the number '4'. The menu items include: Broker Compensation, Advertising & Marketing Resources, Order Materials, Update Your Profile, Direct Deposit, Rewards & Commissions, Manage Email Subscriptions, Personalize Your Website, Email Producer Services, Broker Communications, Quick Links for Brokers, Learn About Our Tools, Find a Doctor, Pharmacy, Health & Wellness, Contact Us, and Be a Blue Shield of CA Broker.

Helping you do business faster and more efficiently with new features that enhance your time both online and offline

Application status

Check updates on IFP & medicare client applications with more status detail than ever before.

Online client list

At a glance, see who's late, send reminders, email your clients ID card links, and quickly do business.

Rewards & commissions

See our competitive broker commissions and special bonus programs.

Small business renewal center

Your single source for renewals, quotes, and maintenance.

Account Management

Registration Steps

MANAGE BROKER CONNECTION ACCOUNTS

[Create an account](#) [Need help?](#)

5

Pending accounts

Name	Role	Email	LOB	Expires	Action
Mitchell J	Administrator	mitchell.j@email.com	IFP Medicare Small Groups Large Groups	2022-03-25	Resend invite

6

Active and deactivated accounts

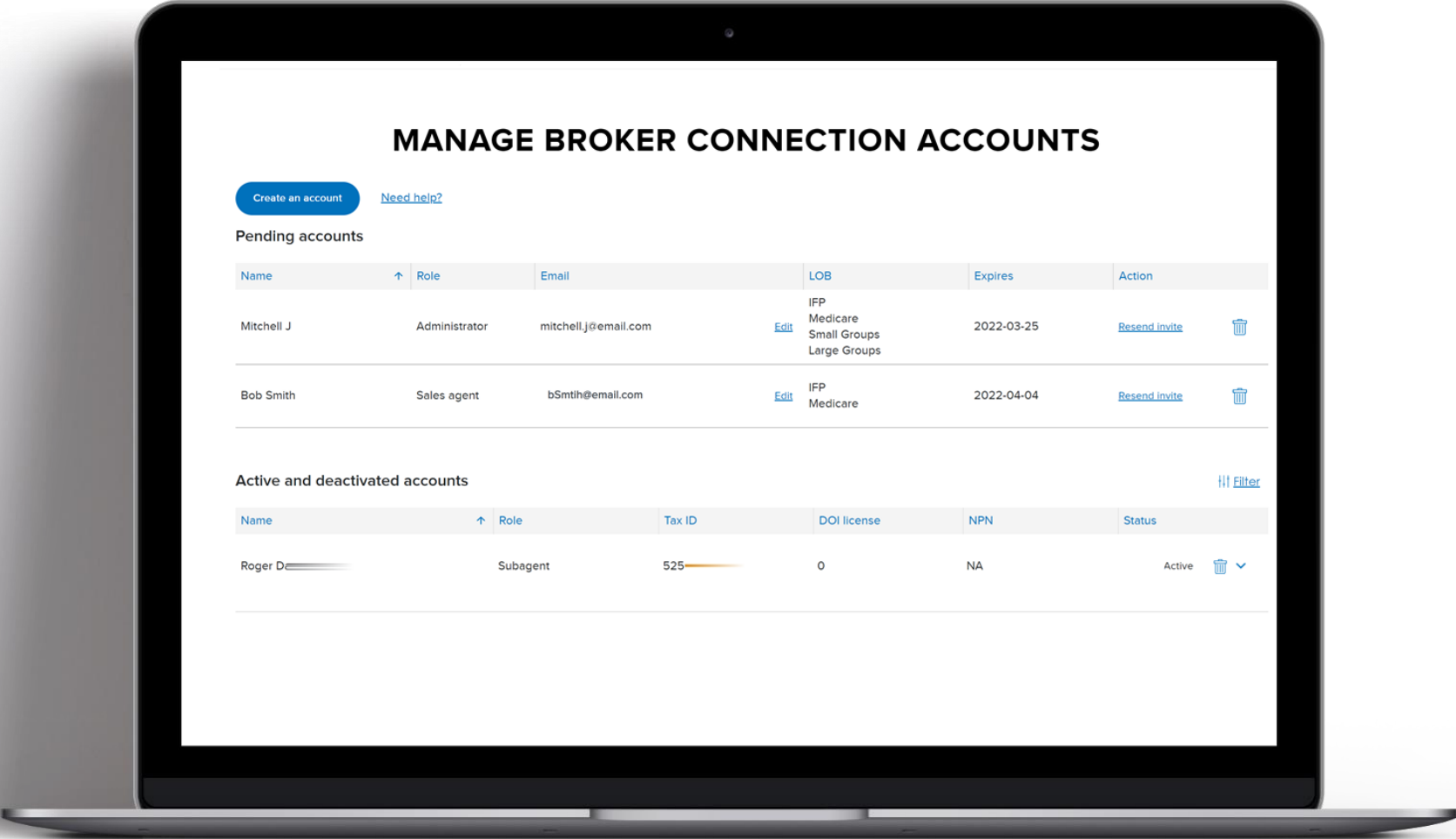
Filter

Name	Role	Tax ID	DOI license	NPN	Status
Roger D	Subagent	525	0	NA	Active

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

- At the top of the page, is the Pending Accounts section, which are accounts that were newly invited to register.
- And at the bottom of the page, there the active and deactivated accounts.

Managing Accounts



Managing Accounts: Pending Accounts

Pending Accounts



MANAGE BROKER CONNECTION ACCOUNTS

Create an account [Need help?](#)

Pending accounts

Name	Role	Email	LOB	Expires	Action
Mitchell J	Administrator	mitchell.j@email.com	IFP Medicare Small Groups Large Groups	2022-03-25	Resend invite
Bob Smith	Sales agent		IFP Medicare	2022-04-04	Resend invite

Active and deactivated accounts

Name	Role	Tax ID	DOI license	NPN	Status
Roger De	Subagent	525604528	0718744	NA	Deactivated Disassociated

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

[Create an account](#)
[Need help?](#)

Pending accounts

Name	Role	Email	LOB	Expires	Action
Mitchell J	Administrator	mitchell.j@email.com	Edit IFP Medicare Small Groups Large Groups	2022-03-25	Resend invite

Active and deactivated accounts

[Filter](#)

Name	Role	Tax ID	DOI license	NPN	Status
Roger Daval Santos	Subagent	525604528	0718744	NA	Deactivated

Contact Information		User Information		
Username rogerdavalsantos39578	Change role <input type="text" value="Subagent"/>	Add/remove lines of business <input checked="" type="checkbox"/> IFP <input checked="" type="checkbox"/> Medicare <input checked="" type="checkbox"/> Small Groups <input checked="" type="checkbox"/> Large Groups	Account status <input type="radio"/> Active <input checked="" type="radio"/> Deactivated <small>This account is no longer associated with the agency.</small>	
Email 759139578mlpstage@blueshieldca.com	<input type="checkbox"/> Access agency client list <input type="checkbox"/> View agency commissions			
Phone NA	<input type="button" value="Cancel"/> <input type="button" value="Save"/>			

Active & Deactivated Accounts

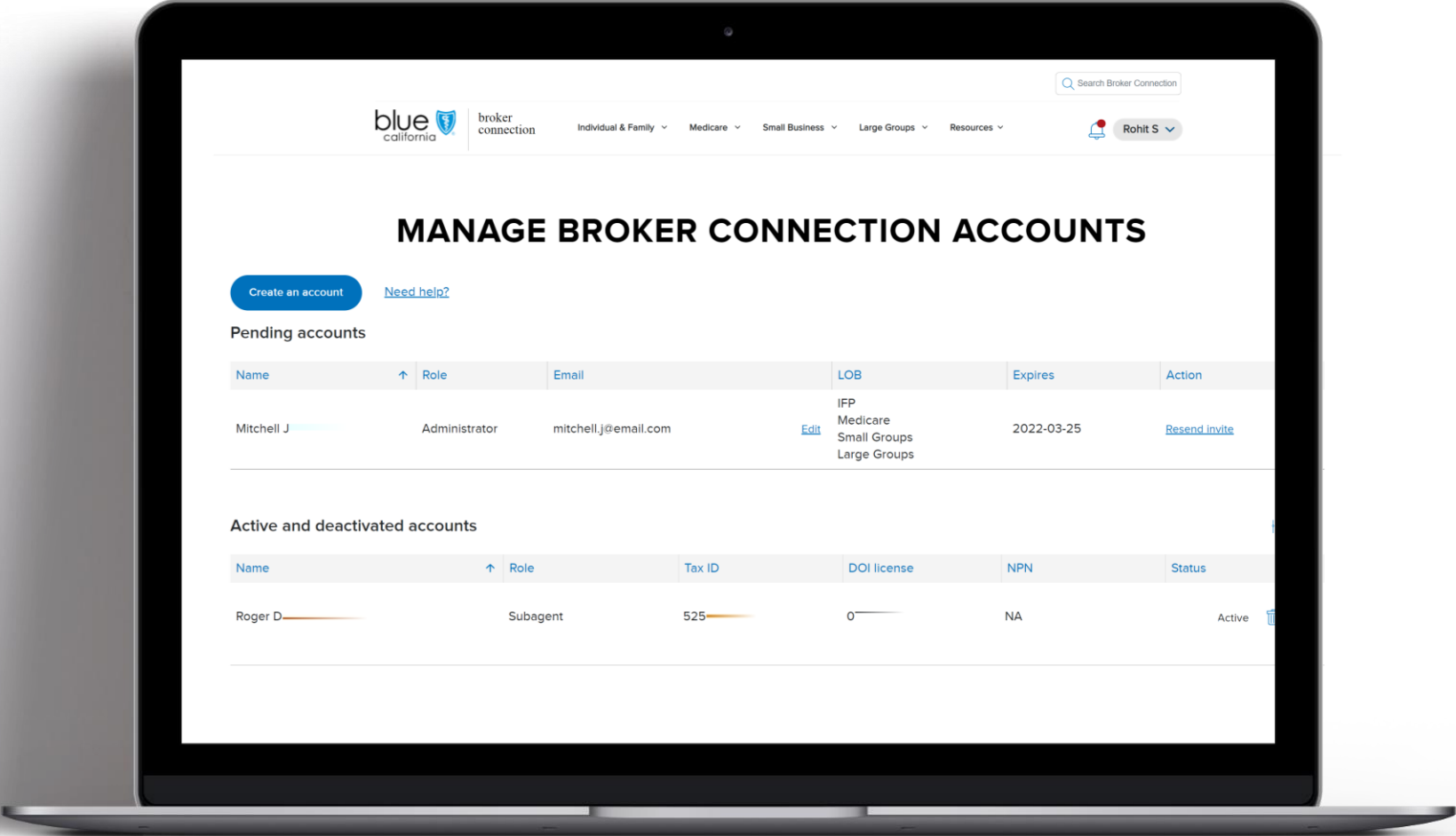
Once the user accepts the invite and creates the account, it will move to Active accounts section.

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

MANAGE BROKER CONNECTION ACCOUNTS

1 [Create an account](#) [Need help?](#)

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

Pending accounts

Name	Role	Email	LOB	Expires	Action
Jasprit B	Primary agent	93@email.com	IFP Medicare Small Groups Large Groups	2022-03-22	Resend invite 

Active and deactivated accounts

 [Filter](#)

No accounts.

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.
- For the first step, **assign a role**.
 - If Subagent is selected, you can **select optional permissions** to:
 - Access agency client list.
 - View agency commissions.
 - 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.

blue california | broker connection | Individual & Family | Medicare | Small Business | Large Groups | Resources | Search Broker Connection | Rohit S

Home > Create an account

1 Assign a role | 2 Lines of business | 3 Personal details | 4 Confirmation

Assign a role

You can change the role later after the account is created.

2 Support Staff Sales agent Subagent Administrator Primary agent

Select optional subagent permissions

3 Access agency client list View agency commissions

4

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			✓	✓	✓
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.

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

blue california broker connection

Individual & Family Medicare Small Business Large Groups Resources

Rohit S

Search Broker Connection

Home > Create an account

Assign a role Lines of business Personal details Confirmation

Choose lines of business

This is just for our information. It won't affect user access.

5 Individual & family plans ✓

Medicare ✓

Small business

Large group

6 Continue

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**.




broker connection

Individual & Family ▾ Medicare ▾ Small Business ▾ Large Groups ▾ Resources ▾


Rohit S ▾

[Home](#) > [Create an account](#)



Enter personal details

First name*
Bob

Last name*
Smith

Email address*
bSmtih@email.com

7 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.

Account created



Account info

Name: Bob Smith Role: Salesagent

Email: _____

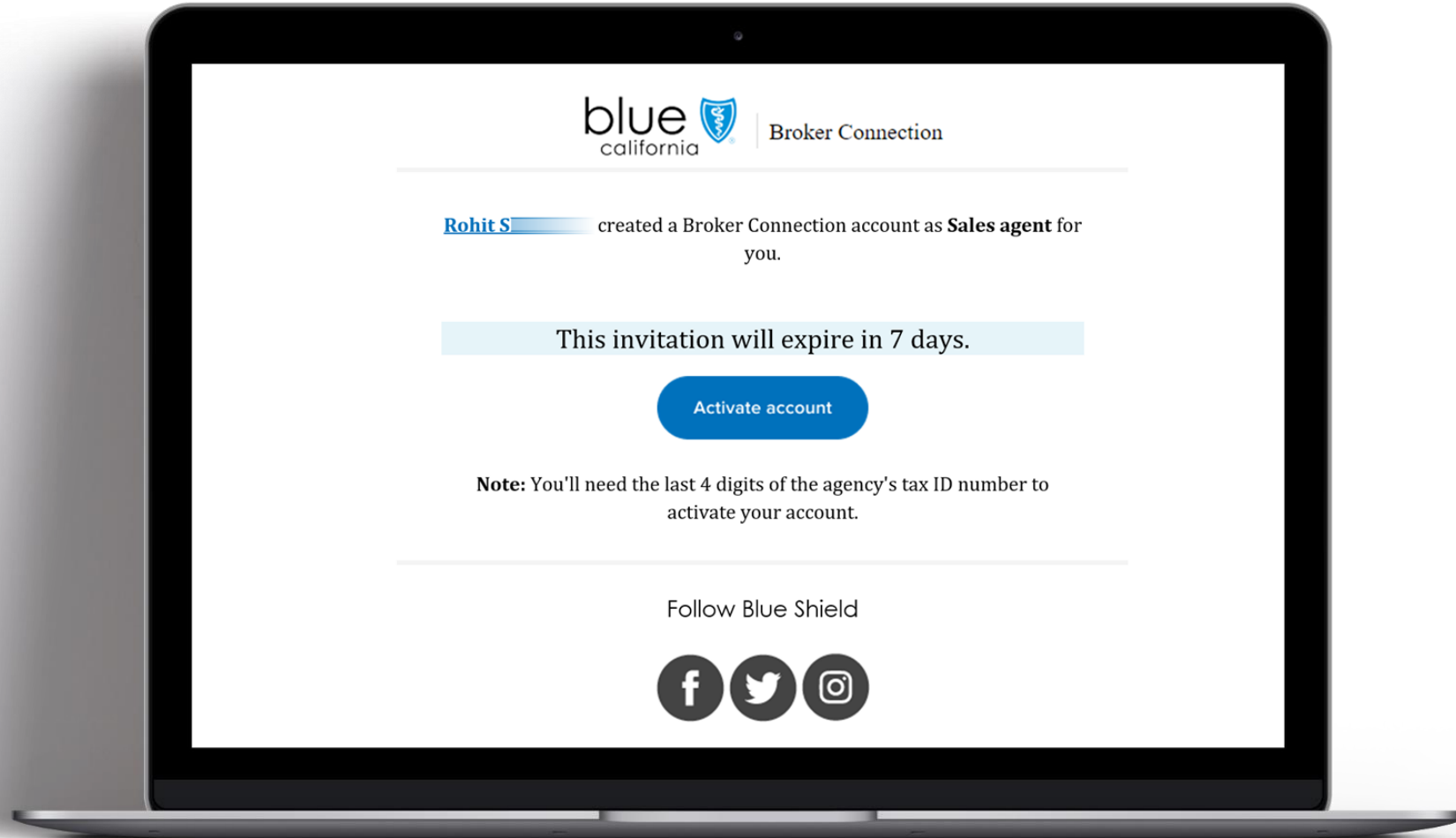
We emailed **Bob Smith** a link to activate their account. They need the last 4 digits of the agency's tax ID for activation.

The link expires in 7 days.

[Return to dashboard](#)

8

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



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

This invitation will expire in 7 days.



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



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.

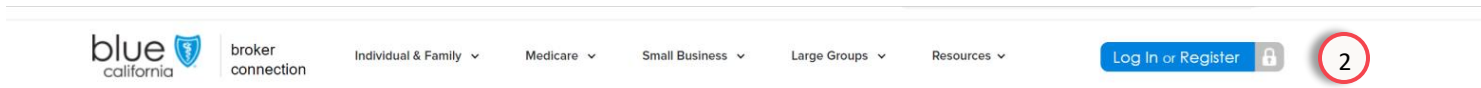
The invite expires in 7 days.

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



WELCOME TO

BROKER CONNECTION

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

Log in to your account



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two step appointment process on our resources page](#).

Join us and watch your business grow.

Get appointed

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.

Welcome to Broker Connection

Log in

Show

Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

Already appointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner on Broker Connection.

Register

3

To register you need:

- The tax ID number for your brokerage or your personal tax ID number
- Your Department of Insurance (DOI) license number
- A National Producer Number (NPN), if you have one

[Who can create an account?](#)

[Get appointed with Blue Shield](#)

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.

Search Broker Connection

blue california broker connection Individual & Family Medicare Small Business Large Groups Resources

ount

Agency information

Enter the last 4 digits of the tax ID (TIN) for the agency.

Last 4 digits of the agency TIN Enter **4**

Register for Broker Connection

✓ ✓ 3 4 5 6
 Lines of business Tax and license Contact Account Confirmation Terms & conditions

Do you already have a Broker Connection account?

If so, when you log in, we'll merge your current client list with the new information you just entered.

5 Yes, I'll log in

No, I need to create an account

[Continue](#)

[Back](#) [Continue](#)

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

blue california | broker connection | Individual & Family | Medicare | Small Business | Large Groups | Resources

Search Broker Connection

[Create an account](#)

Agency (1) | **Credentials (2)** | Contact (3) | Account (4) | Confirmation (5) | Terms & conditions (6)

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

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

You already have a Broker Connection account

Log in with your existing username and password. We'll merge your current client list with the new information you just entered.

Continue **6**

Register for Broker Connection

Log in to merge your accounts

7

[Show !\[\]\(77e268eeb727b1c18b227ae35626dabd_img.jpg\)](#)
 Remember my username

[Forgot your password?](#)

[Forgot your username?](#)

Registration Steps

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

Register for Broker Connection



Your Broker Connection accounts have been successfully merged.

To make changes to your new Broker Connection account, go to your Profile page.

[Log in](#) 8

Follow Blue Shield



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

The screenshot shows the user interface for the Broker Connection site. At the top, there is a navigation bar with various menu items. Below this, a search bar and a 'Get ID card' button are visible. The main content area features a 'WELCOME TO BROKER CONNECTION' header with a sub-header 'Helping you do business faster and more efficiently...'. Below the header are three informational cards: 'Application status', 'Online client list', and 'Rewards & commissions'. To the right, a user profile for 'maddurivenk venkataf' is shown, including a 'View profile' link and a list of companies with their respective IDs. A red circle highlights the number '9' in the top right corner of the profile area. At the bottom, there is a 'Broker news & resources' section with three image-based links for 'IFP', 'SMALL GROUP and LARGE GROUP', and 'MEDICARE'.

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.

Welcome to Broker Connection

Log in

Username

Password Show

Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

Already appointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner on Broker Connection.

Register

To register you need:

- The tax ID number for your brokerage or your personal tax ID number
- Your Department of Insurance (DOI) license number
- A National Producer Number (NPN), if you have one

[Who can create an account?](#)

[Get appointed with Blue Shield](#)

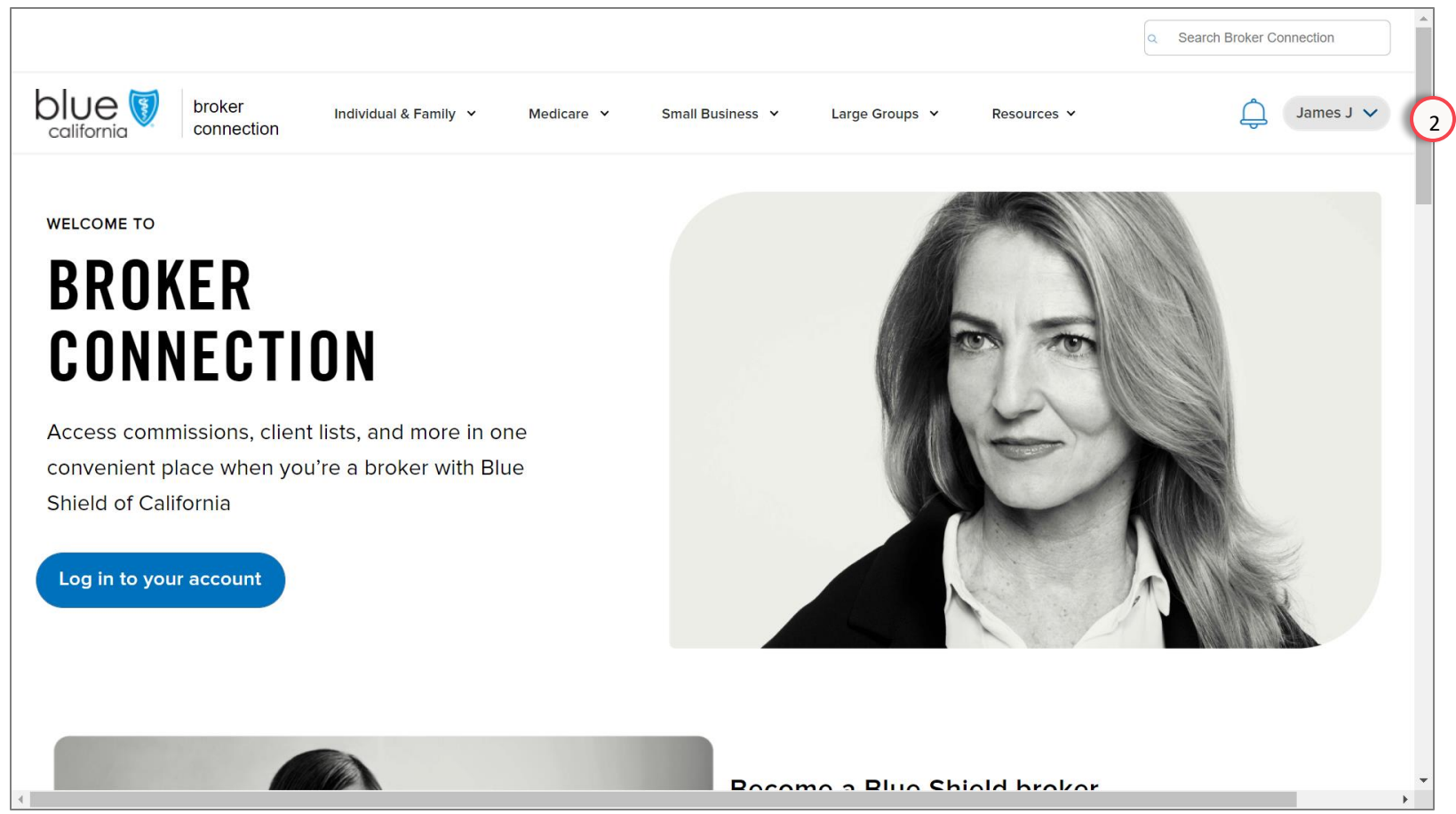
For Agent Use Only. Plans contain exclusions and limitations. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

BLUE SHIELD OF CALIFORNIA 58

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



MY PROFILE

User account [Edit](#)

<input type="text" value="Valid"/>	<input type="text" value="rosabross"/>
<input type="text" value="Producer"/>	<input type="password" value="*****"/>
<input type="text" value="producerconnection@blueshieldca.com"/>	

3

Personal broker credentials

Updating your Profile

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

Updating Your Broker Profile

MY PROFILE

User account
Edit

First name
Valid

Last name
Producer

Email
producerconnection@blueshieldca.com

Username
Must have:

- 8-20 characters
- Numbers and letters only
- No spaces
- Unique Identification

Username
rosabross

Password
Must have:

- 8-20 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- A number or symbol (?#!*)
- No spaces

New password Show

Confirm new password Show

Cancel
Save Changes

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](#)

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.

The screenshot shows the Blue Shield of California website interface. At the top, there is a search bar and navigation tabs for 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. The 'Medicare' tab is selected. Below the navigation bar, there is a grid of menu items. The 'View Application Status' item is highlighted in yellow and has a red circle with the number '1' next to it. Other menu items include 'Compare Plans & Enroll', 'View Client List', 'News & FAQs', 'Sales and Marketing Collateral', 'Enrollment Materials', 'Medicare Eligible Home', 'Products', 'MA-PD/PDP Certification', 'Policies & Procedures', 'Renewals', 'Training and Resources', 'Product Cycle Updates', 'Help Medicare Supplement Clients', 'Help MA-PD Clients', 'Help PDP Clients', 'Learn About Our Tools', and 'Contact Sales and Support Offices'. A notification bell icon with the number '4408' is visible in the top right corner of the menu area.

Helping you do business faster and more efficiently with new features that enhance your time both online and offline



Application status

Check updates on IFP & medicare client applications with more status detail than ever before.

[Check status >](#)

Online client list

At a glance, see who's late, send reminders, email your clients ID card links, and quickly do business.

[Manage your client list >](#)

Rewards & commissions

See our competitive broker commissions and special bonus programs.

[View commission updates >](#)

Small business renewal center

Your single source for renewals, quotes, and maintenance.

[Visit the center >](#)

Medicare plan application status

IFP Off Exchange

IFP On Exchange

Medicare

Filter and Sort

2

Name	Application status	Plan name	Confirmation number
Steve	Approved	Medicare Supplement Plan A Apr18	SCOP21012
Venus	Received	Medicare Supplement Plan A Apr18	SCOP21012
RASHID	Action Required - On Hold Due to Missing Info	Medicare Supplement Plan A Apr18	DRX009072
BRIAN	Processing	Medicare Supplement Plan A Apr18	DRX009072

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.

Medicare plan application status

Hide Filter X









Enter the required information to check your client's application status. To perform a search enter criteria into at least ONE of these input fields: First Name, Last Name, Medicare ID, Confirmation Number or National Producer Number.

<p>Confirmation Number</p> <input type="text"/>	<p>Application Submitted</p> <input type="button" value="Within last 6 months"/>
<p>First Name</p> <input type="text"/>	<p>Last Name</p> <input type="text"/>
<p>Medicare ID Number</p> <input type="text"/>	<p>National Producer Number</p> <input type="text"/>
<p>Sort By</p> <input type="button" value="Latest application"/>	

Medicare plan application status

- IFP Off Exchange
- IFP On Exchange
- Medicare**

Filter and Sort 

Name	Application status	Plan name	Confirmation number
Steve	 Approved	Medicare Supplement Plan A Apr18	SCOP21012 
Venus	 Received	Medicare Supplement Plan A Apr18	SCOP21012 
RASHID	 Action Required - On Hold Due to Missing Info	Medicare Supplement Plan A Apr18	DRX009072 
BRIAN	 Processing	Medicare Supplement Plan A Apr18	DRX009072 

4

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.

Medicare plan application status

- IFP Off Exchange
- IFP On Exchange
- Medicare**

Filter and Sort X

Name	Application status	Plan name	Confirmation number
Venus	Received	Medicare Supplement Plan A Apr18	SCOP210121

Name	Application status	Plan name	Confirmation number
RASHID	Action Required - On Hold Due to Missing Info	Medicare Supplement Plan A	DRX009072

Application requires additional information. Please contact the Support team.

Date of birth	Medicare ID	Subscriber ID	Email address
04/03/1952	9A	N/A	N/A
Plan type	Specialty plans	Coverage effective date	Other subscribers
Med Supp	N/A	N/A	N/A
Producer name	Producer ID	Agency name	Agency/Super Producer ID
N/A	####0494	N/A	N/A
Application submitted date	Application source		
04/30/2019	DRX		

[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 Options

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

Application Status, Continued

Status Options

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

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.


Prospect Application Status Site


Prospect Application Status

Medicare plan application status

Text size:

To check your application status, enter required information below (marked with *).

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Date Of Birth *	Medicare ID Number *
<input type="text" value="MM/DD/YYYY"/> 	<input type="text"/>
Confirmation Number	
<input type="text"/>	

I'm not a robot 

This reCAPTCHA is for testing purposes only. Please report to the site admin if you are seeing this.

Privacy - Terms

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.

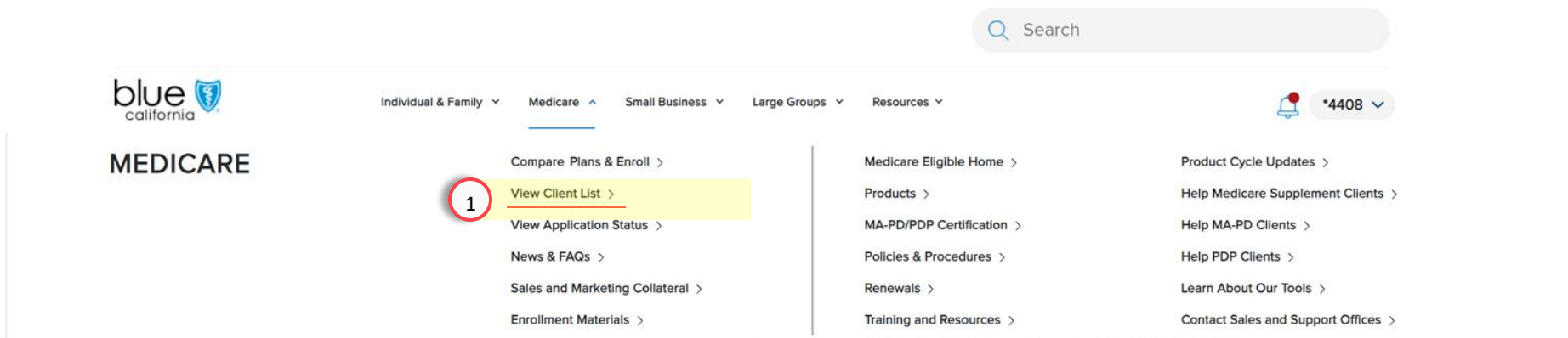
Note

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.



Helping you do business faster and more efficiently with new features that enhance your time both online and offline



Application status

Check updates on IFP & medicare client applications with more status detail than ever before.

[Check status >](#)

Online client list

At a glance, see who's late, send reminders, email your clients ID card links, and quickly do business.

[Manage your client list >](#)

Rewards & commissions

See our competitive broker commissions and special bonus programs.

[View commission updates >](#)

Small business renewal center

Your single source for renewals, quotes, and maintenance.

[Visit the center >](#)

Client List

Client List

Individual & family Medicare Small Business

Hide Filters

Enter search criteria or select a filter here to view specific subscriber results.*

Subscriber First Name <input type="text"/>	Subscriber Last Name <input type="text"/>
Subscriber Plan Type Medicare Supplement Plans	Subscriber ID <input type="text"/>
Subscriber Payment Status View all	Payment Due Date View all
Sort By Default	

2 Search Clear form

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

Send ID Card Search

blue california broker connection Individual & Family Medicare Small Business Large Groups Resources *4408

Client List Pay online | Payment options

Individual & family Medicare Small Business Show Filters

Showing results 1 - 10 of 184 Download client list # of records 10 Expand All

Payment status	Name	Subscriber ID	Plan	ID card ①	Last Payment Received
LATE	SACHIN SHARMA	9803360	Blue Shield Inspire (PPO)	3 Get ID card	\$568.35
LATE	DHONI SINGH	9803360	Blue Shield Inspire (PPO)	Get ID card	\$568.35
LATE	JASON POLLARD	9803360	Blue Shield Rx Enhanced (PDP)	N/A	\$117.80
LATE	KEIRON SHARMA	9803360	Blue Shield Rx Enhanced (PDP)	N/A	\$117.80
LATE	John Livingston	9191253	Medicare Supplement Plan N	Get ID card	\$670.00 Statement
LATE	Bill Gates	9191253	Medicare Supplement Plan N	Get ID card	\$133.00 Statement
LATE	MEYER JONG	919125599	Medicare Supplement Plan A	Get ID card	\$182.00 Statement

Feedback

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

Payment status	Name	ID	Plan	Last Payment Received
LATE	LOES KIN	9191408	Blue Shield 65 Plus (HMO)	\$341.66
LATE	CHASAR JAFRE	9191408	Blue Shield 65 Plus Optional Supplemental Dental HMO Plan	\$124.80
LATE	CHASAR JAFRE	9191408	Blue Shield 65 Plus Optional Supplemental Dental HMO Plan	\$124.80
LATE	WILLIAN BEN	9191408	Blue Shield 65 Plus (HMO)	\$220.83
LATE	CHERRY MILLER	9803238	Blue Shield 65 Plus Optional Supplemental Dental HMO Plan	\$12.40
OTHER	ERBERTO PANI	9803239	Blue Shield Balance (HMO)	\$0.00
OTHER	DARIAN PADILLA	7019701	Medicare Supplement Dental PPO 1000 Aug14	\$0.00 Statement
OTHER	JULEIUS MCKAY	7019701	Medicare Supplement Dental PPO 1000 Aug14	\$0.00 Statement

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.

- Select** the Coverage and click continue.
- 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

Send ID card

To: Darlan@email.com

Subject: Receive Blue Shield ID card(s)

Darlan

We have attached your Blue Shield of California ID card as a PDF. It also includes cards for your dependents, if any.

If you need anything else, please don't hesitate to reach out to my office.

Thank you for your business.

60131130_ID_Card.pdf (155 KB)

[Back](#) [Send](#)

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.

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

Client List

Get ID Cards

The screenshot shows the 'Client List' page with a modal window titled 'Send member instructions'. The modal contains the following text:

7 Send member instructions

To: Darian@email.com

Subject: Receive Blue Shield ID card(s)

Darian Padilla,
 You can use the information below to schedule services with your provider.

Member ID: 70197012400
 Group #: X0001002

To receive your Blue Shield ID card(s):

1. Log in to the Blue Shield Member website.
2. Go to the profile menu and select 'ID card'.
3. Download your Blue Shield of California ID card(s). It also includes cards for your dependents, if any.

If you need anything else, please don't hesitate to reach out to my office.

Thank you for your business.

Buttons: < Back, Send

The background shows a table of client records with columns for Payment status, Name, and Last Payment Received.

Payment status	Name	Last Payment Received
LATE	LOES KIN	\$341.66
LATE	CHASAR JAFRE	\$124.80
LATE	CHASAR JAFRE	\$124.80
LATE	WILLIAN BEN	\$220.83
LATE	CHERRY MILLER	\$12.40
OTHER	ERBERTO PANI	\$0.00
OTHER	DARIAN PADILLA	\$0.00
OTHER	JULEIUS MCKAY	\$0.00

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

Client List

[Pay online](#) | [Payment options](#)

[Individual & family](#)
[Medicare](#)
[Small Business](#)

Show Filters

Showing results 1 - 10 of 184 [Download client list](#)

19

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⁱ	Last Payment Received
LATE	SACHIN SHARMA	9803360	Blue Shield Inspire (PPO)	Get ID card	\$568.35 ▼
LATE	DHONI SINGH	9803360	Blue Shield Inspire (PPO)	Get ID card	\$568.35 ▼
LATE	JASON POLLARD	9803360	Blue Shield Rx Enhanced (PDP)	N/A	\$117.80 ▼
LATE	KEIRON SHARMA	9803360	Blue Shield Rx Enhanced (PDP)	N/A	\$117.80 ▼
LATE	John Livingston	9191253	Medicare Supplement Plan N	Get ID card	\$670.00 Statement ✓ 20
LATE	Bill Gates	9191253	Medicare Supplement Plan N	Get ID card	\$133.00 Statement ▼
LATE	MEYER JONG	919125599	Medicare Supplement Plan A	Get ID card	\$182.00 Statement ▼

Feedback

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

Client List

[Pay online](#) | [Payment options](#)

[Individual & family](#)
[Medicare](#)
[Small Business](#)

Show Filters

Showing results 1 - 10 of 184 [Download client list](#)

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⁱ	Last Payment Received
LATE	SACHIN SHARMA	9803360	Blue Shield Inspire (PPO)	Get ID card	\$568.35

21

Feedback

Subscriber Information

Client Information	Plan Information	Additional Products	Rate Section	Additional Billing Info	Members on policy
Subscriber Name: SACHIN SHARMA	Plan renewal date: 01/01/2024	Dental Plan N/A	Subscriber Rate Change: N/A	Payment due date: 05/01/2023	Household Savings N/A
Address 2226 MACARTHUR BLVD KLAND CA, 94602	Cancellation date: N/A	Rate Change date: N/A	Bill Type Direct Bill		
Phone (747) 800-4790	Original enrollment date: 05/01/2023	Rate notification date: N/A	Bill Frequency: Monthly		
DOB 10/19/1951	Application id 518661	Rate region N/A			
Member registered email james11@bsc888.com	Application email N/A	National producer 21352			

Payment status	Name	Subscriber ID	Plan	ID card ⁱ	Last Payment Received
----------------	------	---------------	------	----------------------	-----------------------

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](#)

Order presale kits

Ordering Steps

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

The screenshot shows the Blue Shield of California Medicare website. At the top, there is a navigation bar with tabs: Individual & Family, Medicare (highlighted with a red circle and '1'), Small Business, Large Groups, and Resources. Below the navigation bar, there is a search bar and a notification bell icon with '4408'. The main content area is titled 'MEDICARE' and contains several links: Compare Plans & Enroll, View Client List, View Application Status, News & FAQs, Sales and Marketing Collateral, Enrollment Materials (highlighted with a red circle and '2'), Medicare Eligible Home, Products, MA-PD/PDP Certification, Policies & Procedures, Renewals, Training and Resources, Product Cycle Updates, Help Medicare Supplement Clients, Help MA-PD Clients, Help PDP Clients, Learn About Our Tools, and Contact Sales and Support Offices. Below the navigation bar, there is a promotional banner with the text 'Helping you do business faster and more efficiently with new features that enhance your time both online and offline' and a photo of a woman. Below the banner, there are four feature cards: Application status, Online client list, Rewards & commissions, and Small business renewal center. Each card has a brief description and a link to learn more.

Order presale kits

blue shield of california

Welcome, test green

Welcome to the newly designed DIGITAL ONLY Blue Shield of California storefront.

Here you will order Medicare materials for the Medicare Annual Enrollment Period.

To place an order for **Presale Materials**, please select the product line in the upper left hand corner for which you would like to order materials.

- Order received by 10 a.m. will process same day and ship within 2-3 days.
- Order received after 10 a.m. will process next day.

Note:

- If you need to place an order with a lower quantity that is offered as an option, please contact your Regional Sales Manager.

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

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

The screenshot shows the Blue Shield of California website interface. On the left, there is a navigation menu under 'BSC MAPD' with a list of counties: Alameda, Fresno, Kern (selected), Los Angeles, Madera, Merced, Orange, Riverside, Sacramento, San Bernardino, San Diego, San Joaquin, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Stanislaus, and Ventura. Below this are buttons for 'BSC PDP', 'BSC MEDSUPP', 'BSC OTHER', and 'BSC IFP'. The main content area shows a 'Welcome, test green' header, followed by the 'kern' region name and a 'presale kit' dropdown menu. A card for 'Kern-65 Plus (HMO)' is displayed, featuring a 'MEDICARE ADVANTAGE' document image and a '+ Order' button. Red circles with numbers 6 and 7 highlight the 'presale kit' dropdown and the '+ Order' button, respectively. At the top right of the page, there are navigation icons for home, user profile, shopping cart, calendar, and help.

Order presale kits

Ordering Steps

- Select the **quantity**.
- 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.

The screenshot shows the Blue Shield of California website interface. On the left is a navigation menu with 'BSC MAPD' expanded and 'Kern' selected. The main content area shows 'kern' and 'presale kit' expanded. A product card for 'Kern-65 Plus (HMO)' is displayed, featuring a 'presale kit' image and two quantity selection options: 'English 5' and 'Spanish 15'. Each quantity field has a PDF icon to its right. A green '+ Add to Cart' button is located below the quantity fields. Red circles with the numbers 8 and 9 are overlaid on the English and Spanish quantity fields, and the 'Add to Cart' button, respectively.

Order presale kits

blue  of california



▼ BSC MAPD

- Alameda
- Fresno
- Kern
- Los Angeles
- Madera
- Merced
- Orange
- Riverside
- Sacramento
- San Bernardino
- San Diego
- San Joaquin
- San Luis Obispo
- San Mateo
- Santa Barbara
- Santa Clara
- Stanislaus
- Ventura

▶ BSC PDP

▶ BSC MEDSUPP

▶ BSC OTHER

▶ BSC IFP

Welcome, test green

your order

Please review your order. The shipping address defaults to the address in your user profile (change this with the "Edit Profile" feature). To ship this order to a different address simply enter it in the fields below.

Once your order items and delivery address are confirmed click "Place Order".

Orders received by 10 a.m. (PST) will process same day and ship within 2-3 days.

Orders received after 10 a.m. will process next day.

order information

Year	Item	Description	Language	Qty	
2024	Kern-65 Plus (HMO)	Kern	English	5	✕
2024	Kern-65 Plus (HMO)	Kern	Spanish	15	✕

Your order is 8.6 lbs. If you wish to place this order click on the Place Order button below.

shipping information

Name

Attention

Street 1

Street 2


City State Zip

Phone

11

Validate Address

12



← Continue Shopping

🛒 Click here to Place Order

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](#)

Advertising Materials

Ordering Steps

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

blue california

Individual & Family Medicare Small Business Large Groups Resources

4408

RESOURCES

- Broker Compensation >
- Advertising & Marketing Resources >**
- Order Materials >
- Update Your Profile >
- Direct Deposit >
- Manage your accounts >
- Rewards & Commissions >
- Mandates Information >
- Personalize Your Website >
- Email Producer Services >
- Broker Communications >
- Quick Links for Brokers >
- Learn About Our Tools >
- Find a Doctor >
- Pharmacy >
- Health & Wellness >
- Contact Us >
- Be a Blue Shield of CA Broker >

Helping you do business faster and more efficiently with new features that enhance your time both online and offline

- Application status**
Check updates on IFP & medicare client applications with more status detail than ever before.
[Check status >](#)
- Online client list**
At a glance, see who's late, send reminders, email your clients ID card links, and quickly do business.
[Manage your client list >](#)
- Rewards & commissions**
See our competitive broker commissions and special bonus programs.
[View commission updates >](#)
- Small business renewal center**
Your single source for renewals, quotes, and maintenance.
[Visit the center >](#)

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.

The screenshot shows the '2024 Medicare Broker Marketing Collateral' catalog page. At the top, there is a search bar and navigation icons. The left sidebar contains filters for Language (English, Chinese, Korean, Spanish), Audience (Medicare Prospects, Medicare Brokers), and Plan Type (Medicare Supplement, Medicare Advantage, Medicare Duals, Age-In Materials, Other - Broker, Seminar Materials). The main area displays a grid of item cards, each with a thumbnail, title, ID, and description. Red circles highlight the filter sidebar (7), an item card (8), and the pagination controls (9).

Advertising Materials

Ordering Steps

- A preview of the marketing collateral is displayed.
- 10. Click the **Customize** button to add your personalized contact information.

The screenshot displays the '2024 Medicare Seminar Postcard' asset page. At the top, there is a search bar labeled 'Search for Assets' and navigation icons. Below the search bar, the breadcrumb trail reads: 'Catalog > All Categories > 2024 Medicare Broker Marketing Collateral > 2024 Medicare Seminar Postcard'. On the left, a product card shows the title '2024 Medicare Seminar Postcard', ID 'A54283MED_0923', and description 'A fillable postcard to promote webinars and in-person seminars.' The main area features a large preview of the postcard. The postcard has the 'blue shield of california' logo and the text: 'You're invited', '<It's bingo time>/ <Cake and coffee>/ <Medicare 101>/ <Let's talk about medicare>/ <Medicare information event>', and 'RSVP today. Call <xxx-xxx-xxxx>, or visit <bcsa.com/medicare>'. A photo of an elderly couple is on the right. At the bottom of the preview, there are 'Share' and 'Customize' buttons. A red circle highlights the 'Customize' button.

Advertising Materials

Ordering Steps

11

Customize >

2024 Medicare Seminar Postcard

A54283MED_0923

A fillable postcard to promote webinars and in-person seminars.

Select Image

None Selected... v

[Q Search gallery](#)

Subheadline

None Selected... v

Website

bsca.com/medicare

Event Name

Date 1

📅

Time 1

None Selected... v

Location Name

Location Address

Event Name

12

Cancel Preview

View 📱 🖨️
Page ← → 1 of 1
Zoom − + 100% v

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.

Date 2

Time 2 None Selected...

Location Name

Location Address

Upload your photo


 Upload file

Broker First Name

Broker Last Name

Broker License

Broker Phone

Operating Hours

Broker Email

Cancel Preview



View ☐ ☒

Page ◀ ▶ 1 of 1

Zoom − + 100%

13

Advertising Materials

Ordering Steps

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

Date 2

Time 2

None Selected...

Location Name

Location Address

Upload your photo



Upload file

Broker First Name

Broker Last Name

Broker License

Broker Phone

Operating Hours

Broker Email

Cancel
Done



The preview shows a 'blue california' logo at the top left. Below it is the text 'You're invited Medicare 101'. On the right is a photo of an elderly woman hugging a young boy, framed in a pink border. At the bottom left is a QR code, and at the bottom right is the text 'RSVP today. Call (800) 555-1212, or visit bsca.com/medicare'. A red circle with the number '15' is positioned above the photo.

View
Page 1 of 2
Zoom 100%

14

15

Advertising Materials

The screenshot shows a user interface for customizing advertising materials. At the top, there is a search bar labeled "Search for Assets" and navigation icons for home, back to customization, and back to catalog. A success message reads: "Awesome, your item has been customized successfully." Below this is a preview of a Medicare 101 invitation card. The card features the "blue california" logo, the text "You're invited Medicare 101", a QR code, and contact information: "RSVP today. Call (800) 555-1212, or visit bsca.com/medicare". A photo of an elderly woman and a young child is shown in a pink frame. A "Download" button is located at the bottom of the preview area.

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](#)

New Commission Statements

Accessing Commission Statements

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

- 1. Click **Broker Compensation**

Helping you do business faster and more efficiently with new features that enhance your time both online and offline

Check Out All The Features...

Overview

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.

Process Year	Process Month	Pay Entity ID	Pay Entity Name	Payout Type Id	Date To	
2019	4	00255	CSQHH	Commercial Payout	05/07/2019	Statement
2019	3	00255	CSQHH	Commercial Payout	04/07/2019	Statement
2019	3	00255	CSQHH	BON-ManualAdjust...	03/29/2019	Statement
2019	2	00255	CSQHH	Commercial Payout	03/07/2019	Statement

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.

- 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.
- 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.
- 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)

[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.

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 BGKGKGGK 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	909I	George, Clark	Med Supp	09//2022	09//2023	\$598.00	\$598.00	10.00%	\$ 59.80
X000	909I	George, Clark	Med Supp	09//2022	09//2023	\$598.00	\$598.00	10.00%	\$ 59.80
X000	909I	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	906I	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	906I	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	909I	Samuel, Nick	Med Supp	08//2022	08//2023	\$579.00	\$579.00	10.00%	\$ 57.90
X000	909I	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 Commission Detail

Viewing Commission Detail

BSC - Commission Detail

Enter monthend period (YYYYMM): 201608

Run Report Clear Parameters Save

Process_Month	Business_Type	Broker_ID	Broker_Name	Broker_NPN	Payee_ID	Payee_Name
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L

Save

Your requested report has the following "Save as" options. Please tap one of the available items to save in that format.

- CSV (Comma-separated values)**
 Use this format to create comma separated files, *.CSV. This format is widely adopted by many software programs, and is commonly viewed with Excel or Notepad.
- XLS (Microsoft Excel)**
 Use this format to create a Microsoft Excel file, *.XLS. This format is commonly opened with Microsoft Excel. If the values in this format are not properly formatted, try the *.CSV option instead.
- New Window**
 View content in new window

Cancel

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

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

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

October							November							December							
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
1	2	3	4	5	6	7				1	2	3	4							1	2
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	
29	30	31					26	27	28	29	30			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 AS0360-BSC_0922



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