Broker Connection Account Management Tool

Agenda

- Introducing Broker Connection Account Management Tool
- Registration
- Account Management Tool
- Subagents

Introducing Broker Connection Account Management Tool

Appointed **Primary Agents** are able to open new user accounts, assign roles, grant permissions, and customize access for your account on Broker Connection.

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

Today's Overview

Registration

A demonstration to showcase how an appointed broker would register for a Broker Connection account.

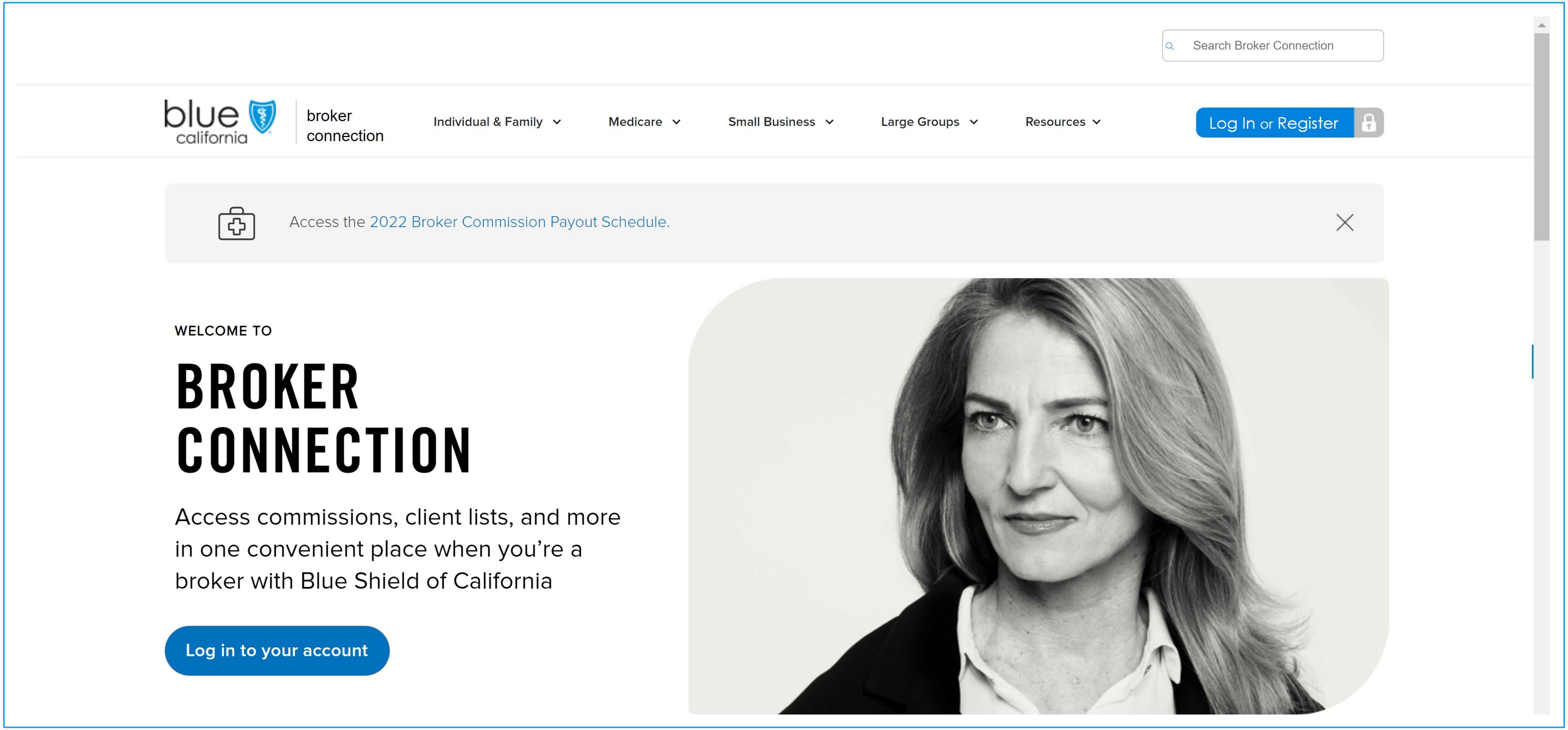
Account Management

An overview of the new Primary Agent Account Management features.

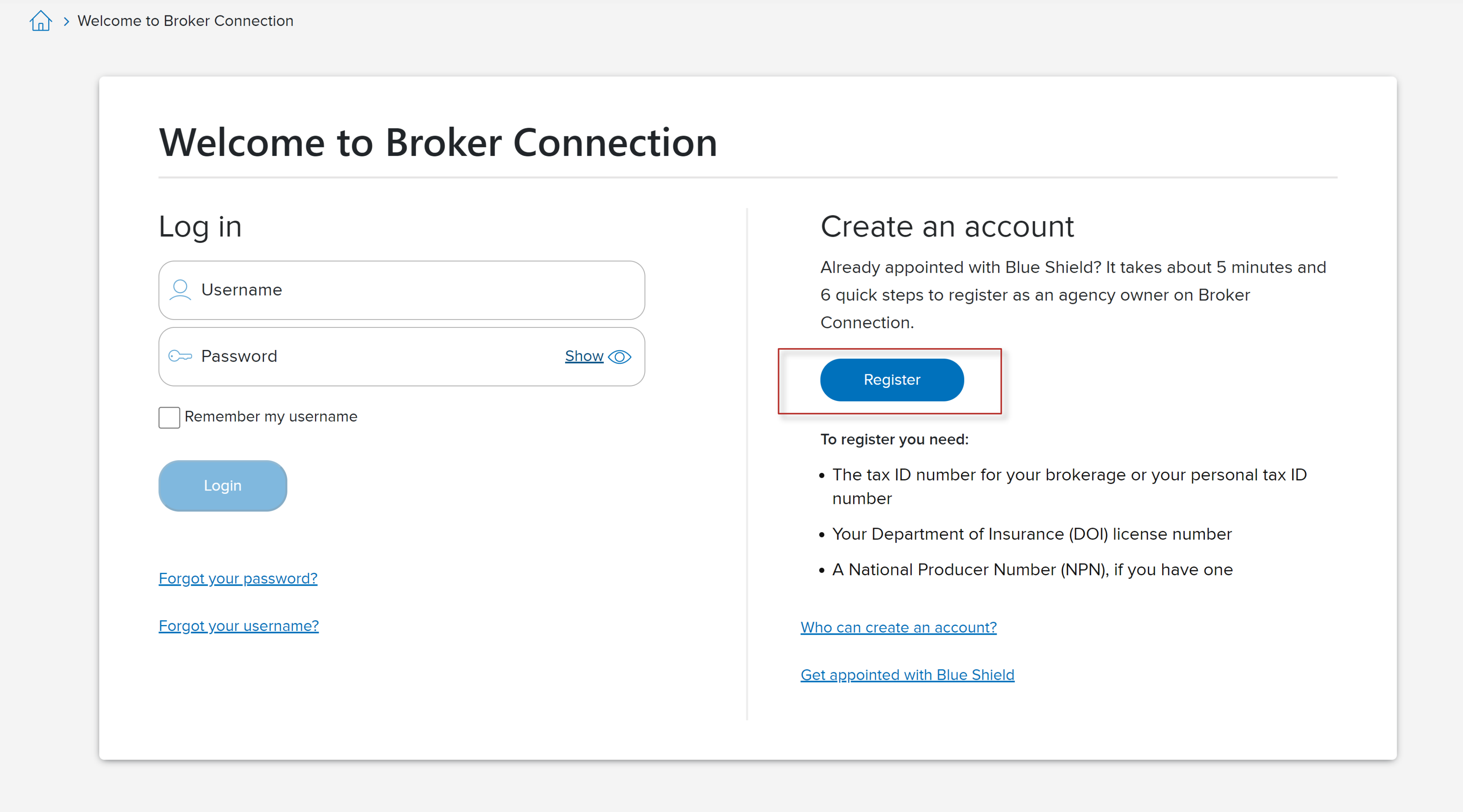
Subagents

Accepting an invite from a Primary Agent to create a Broker Connection account.

Broker Connection Home Page: Click the ***Log In or Register*** *button*



Create an Account: Click the ***Register*** button



Step 1: Select the lines of business that you sell

Create an account

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

What lines of business do you sell?

Select all that apply.

Individual & family plans

Medicare

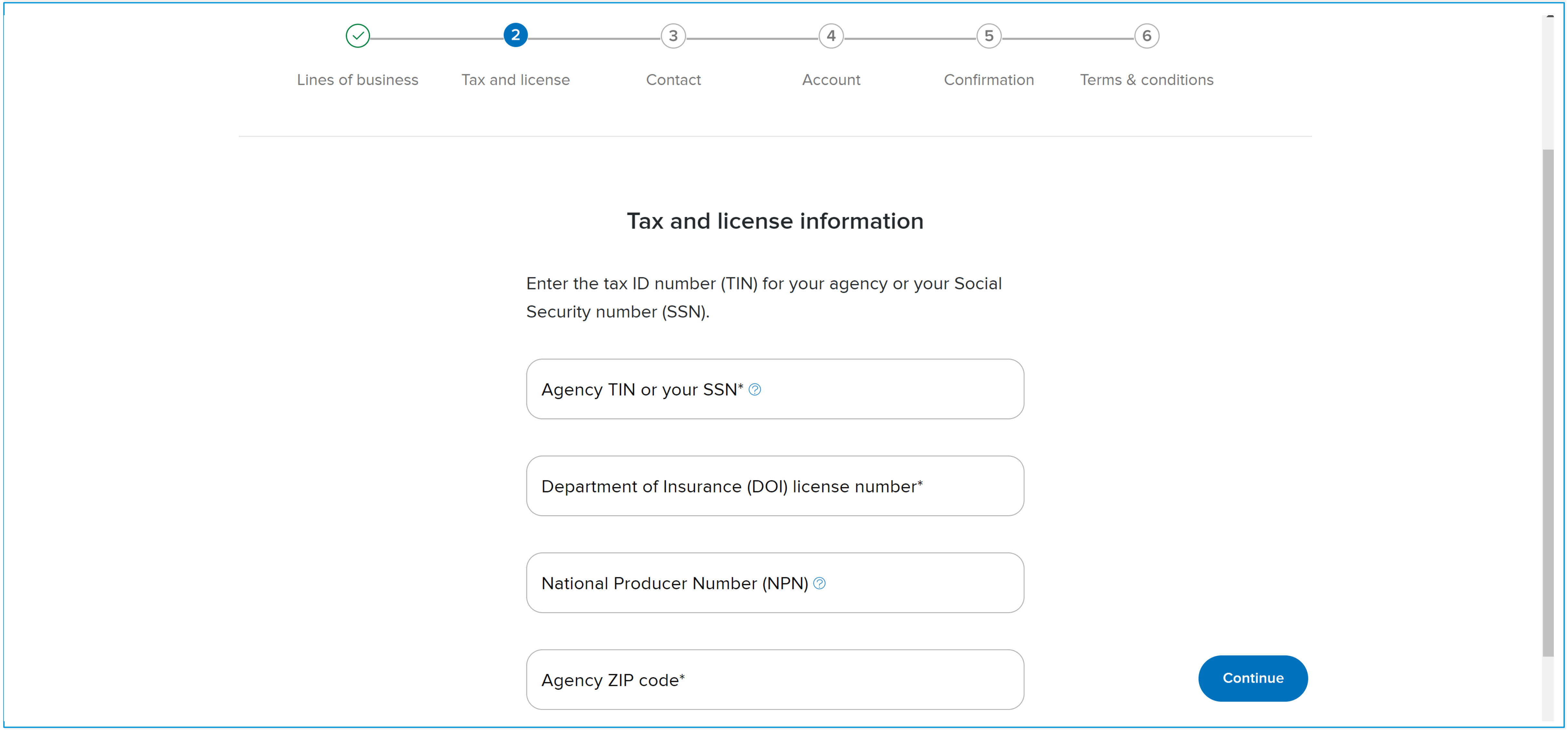
Small business

Large group

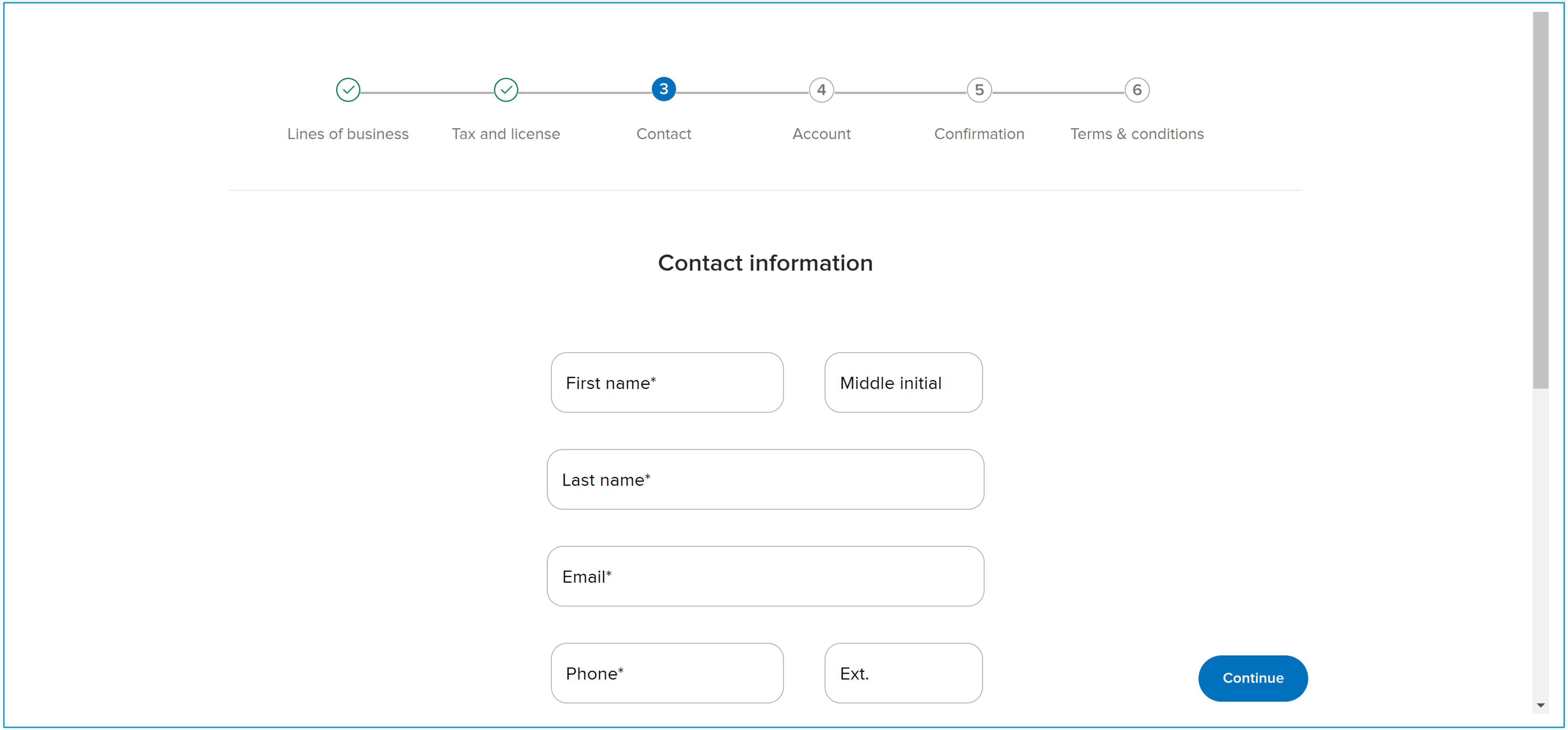
Back

Continue

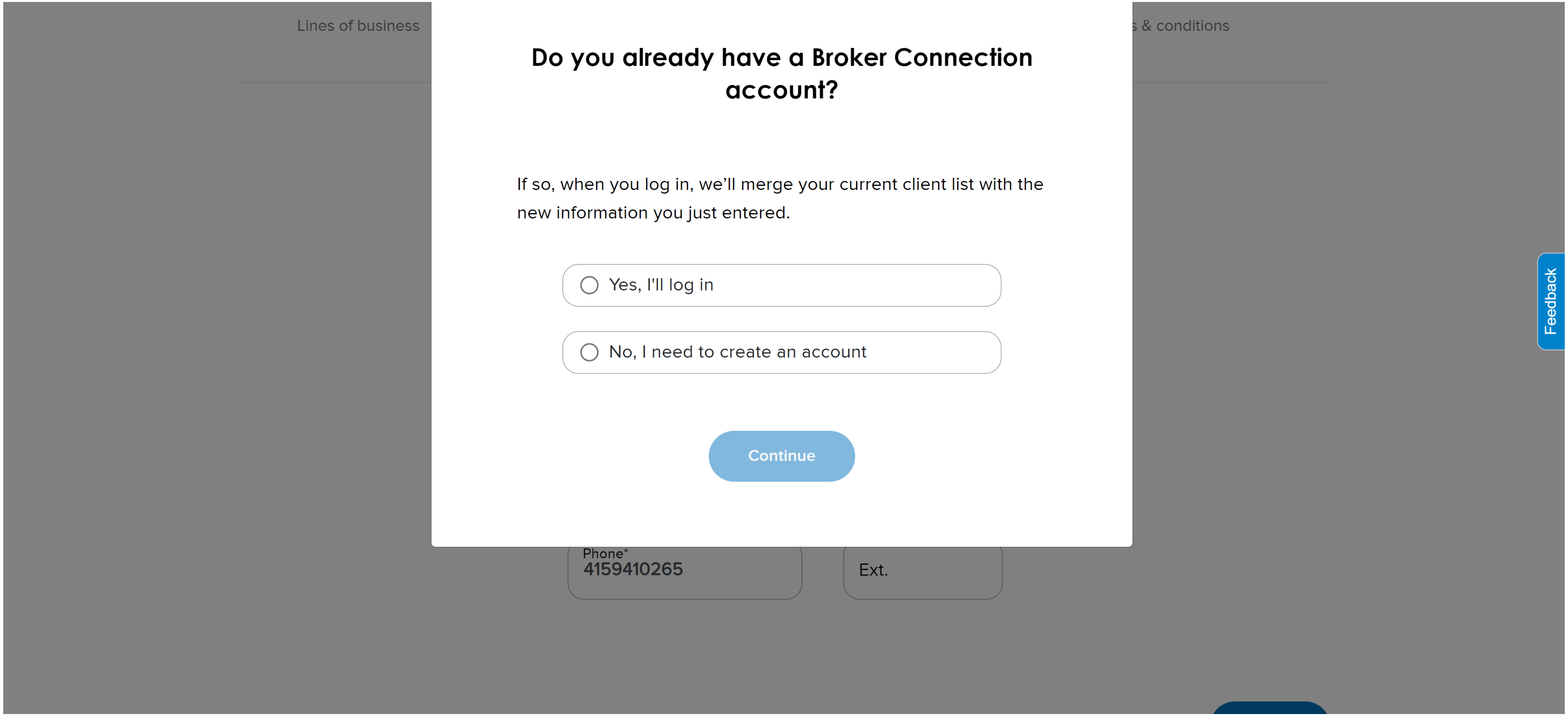
Step 2: Enter the tax and license information



Step 3: Enter your contact information



Select a response to the account question



Step 4: Create your account username and password

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

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

Continue

Step 5: Confirm your account information

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

Continue

Feedback

Step 6: Review the terms and conditions

Create an account

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

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).

Step 6: Review the terms and conditions – sign and select date to acknowledge

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.

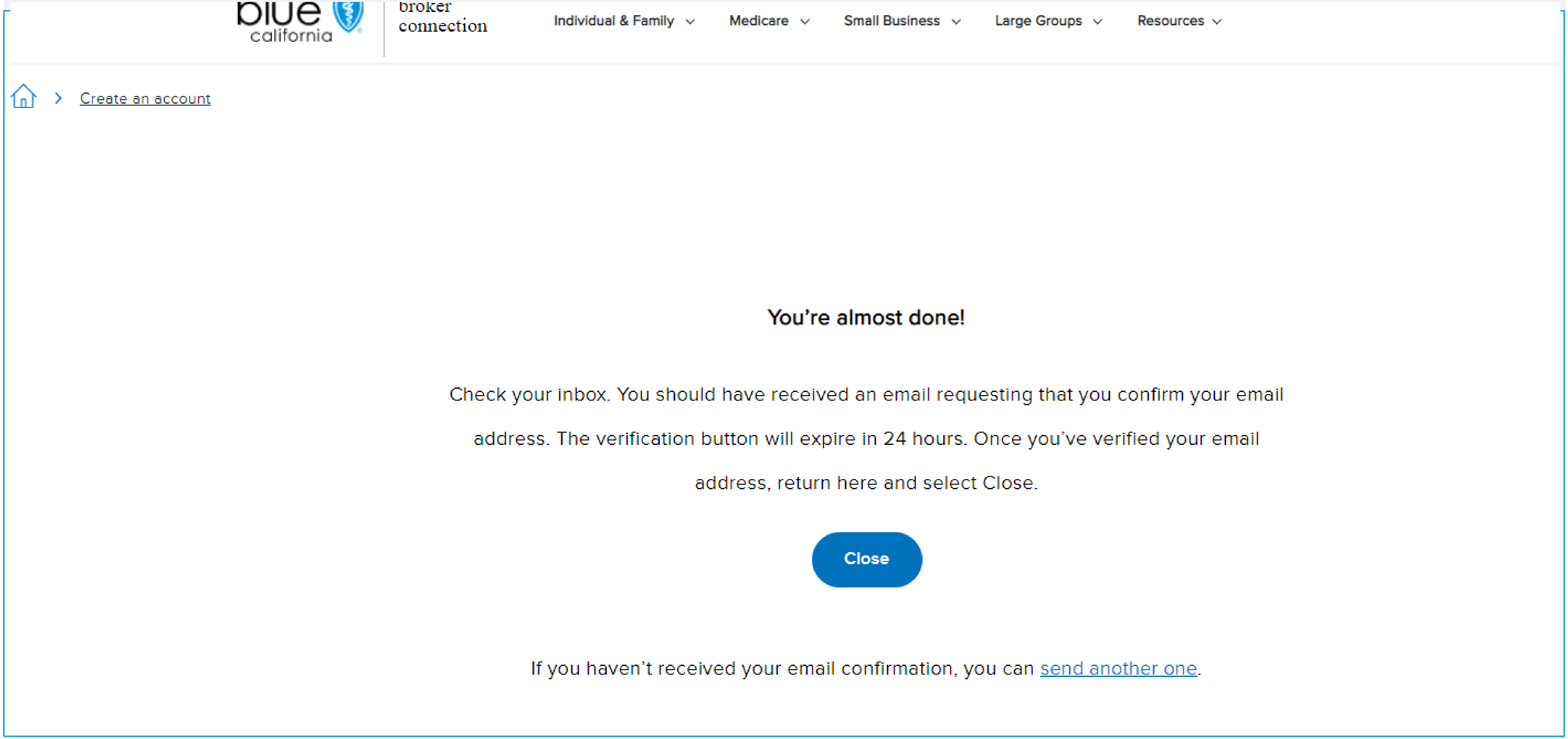
Enter your full name and today's date to agree to our terms and conditions.

Enter your full name

Select today's date

Continue

Step 7: Verify your email address – registration confirmation



Step 8: Verify your email address (click on Verify email button)

Thank you for registering with Broker Connection

First name: Maria

Last name: Test

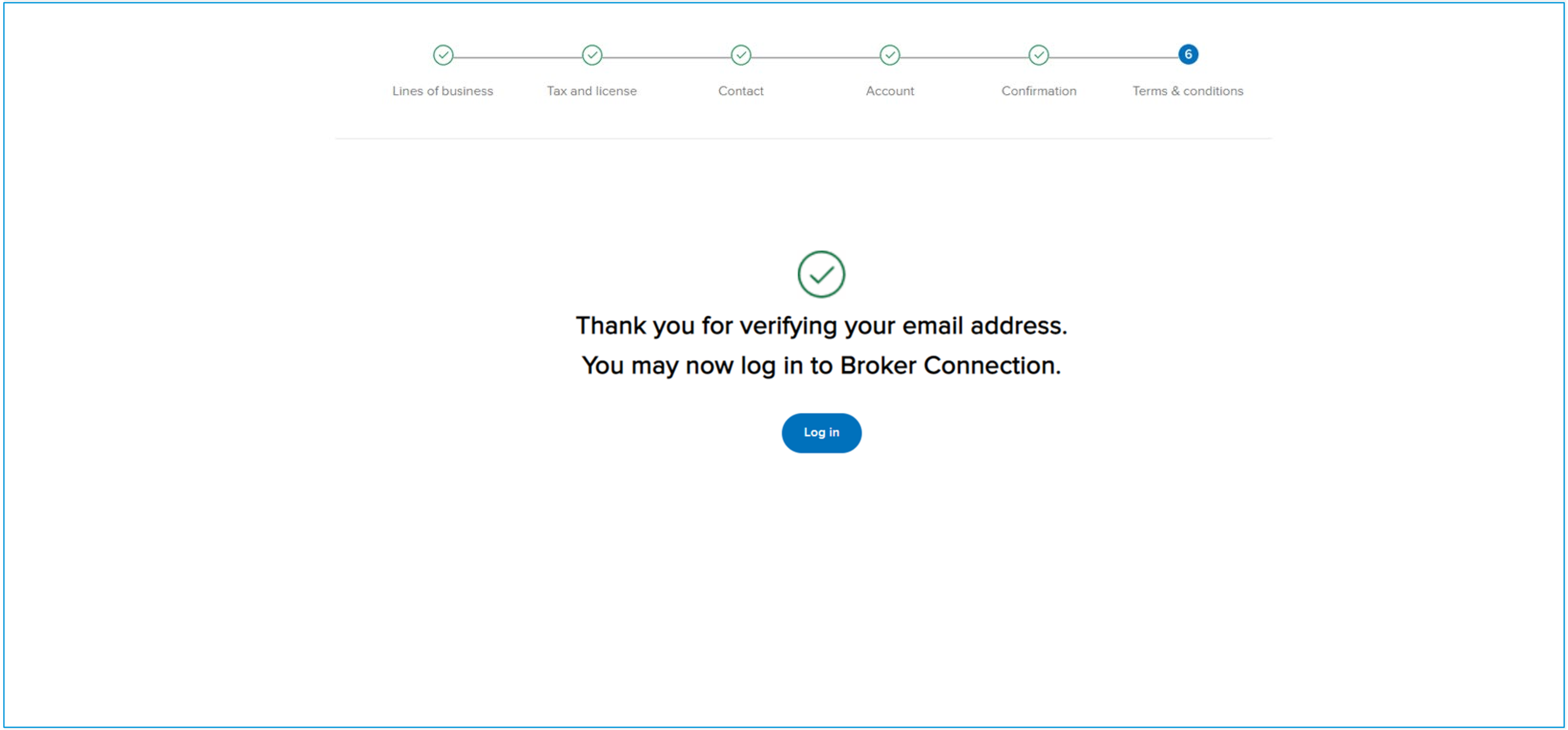
Agency: CANCMAIN STREET FIN SVCS INC

Username: UN364370171

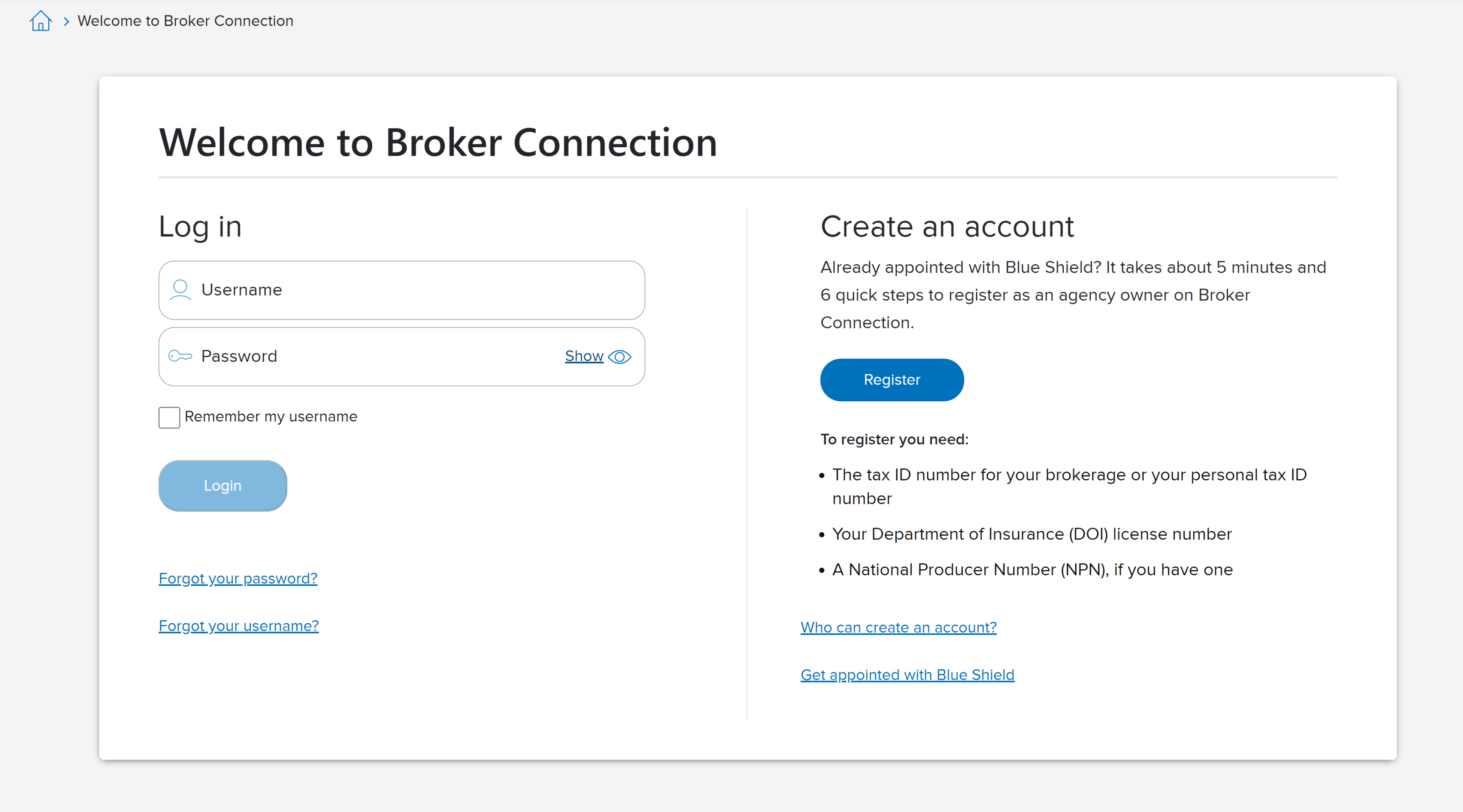
Once you verify your email address, you can log in with your username and password. This link will expire 24 hours after you signed the Terms and Conditions.

Verify email

Step 9: Click the ***Log In*** button



Step 10: Log In to Broker Connection



Broker Connection Home Page: Authenticated User

Search Broker Connection

blue california | broker connection

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

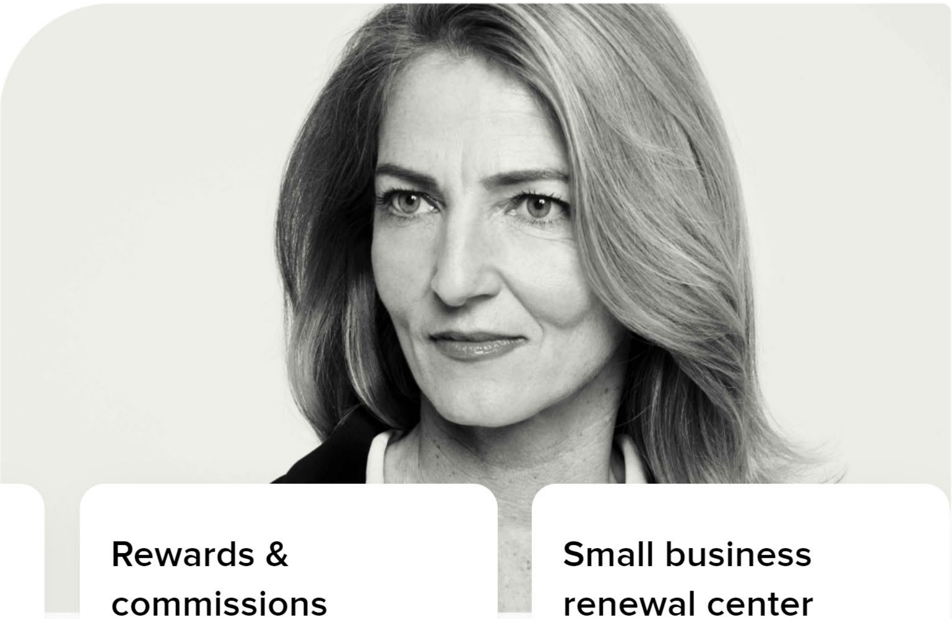
Rohit S

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 &

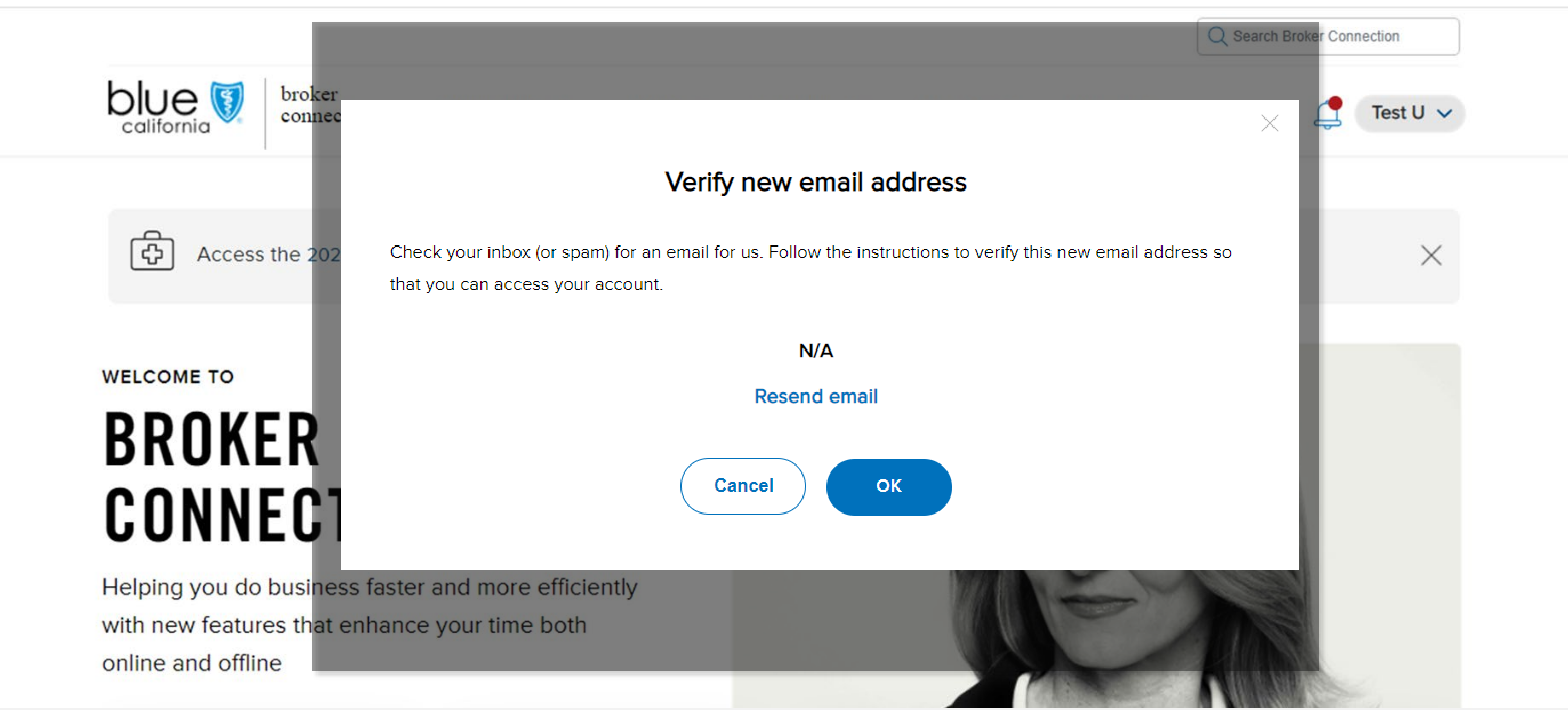
Online client list

At a glance, see who's late,

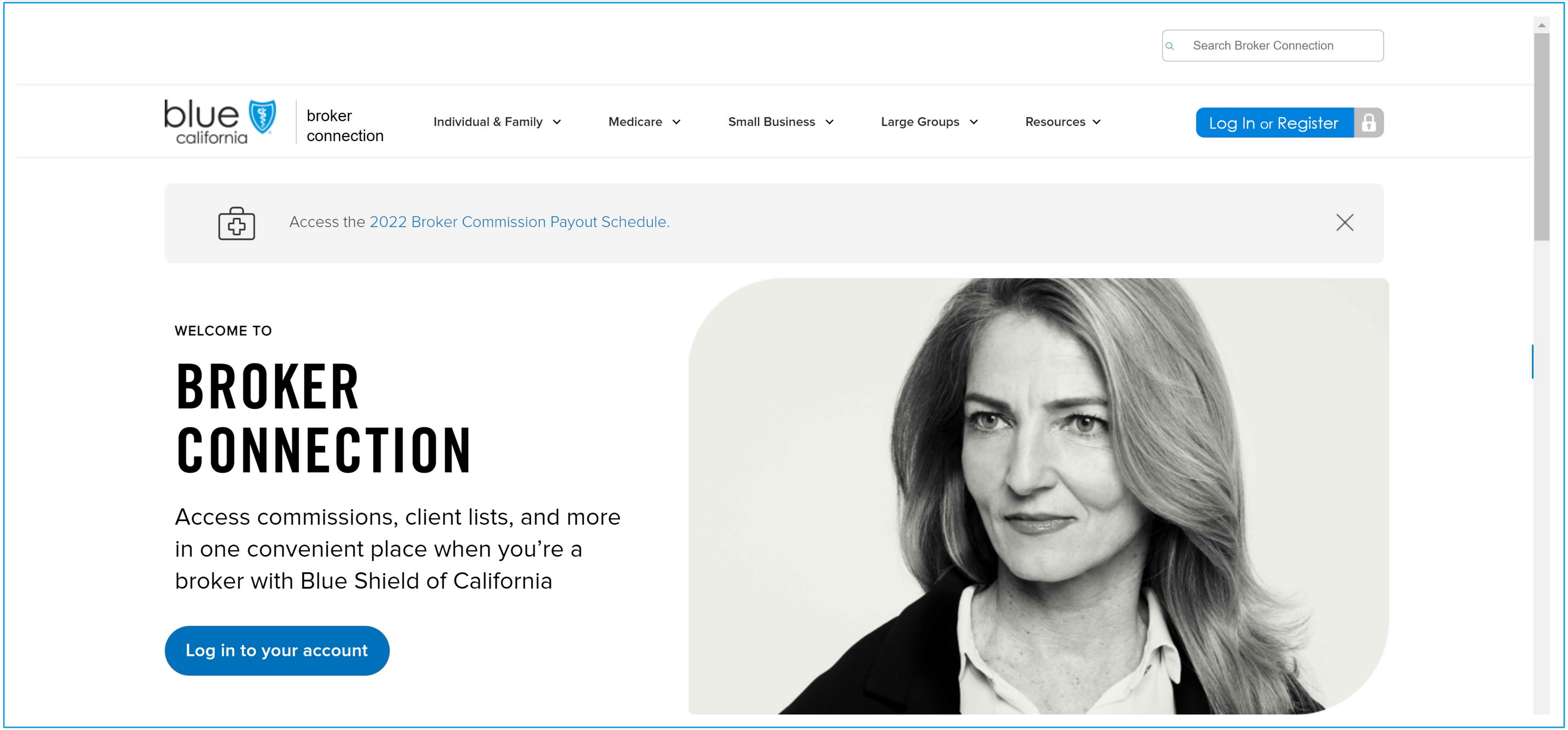
Rewards & commissions

Small business renewal center

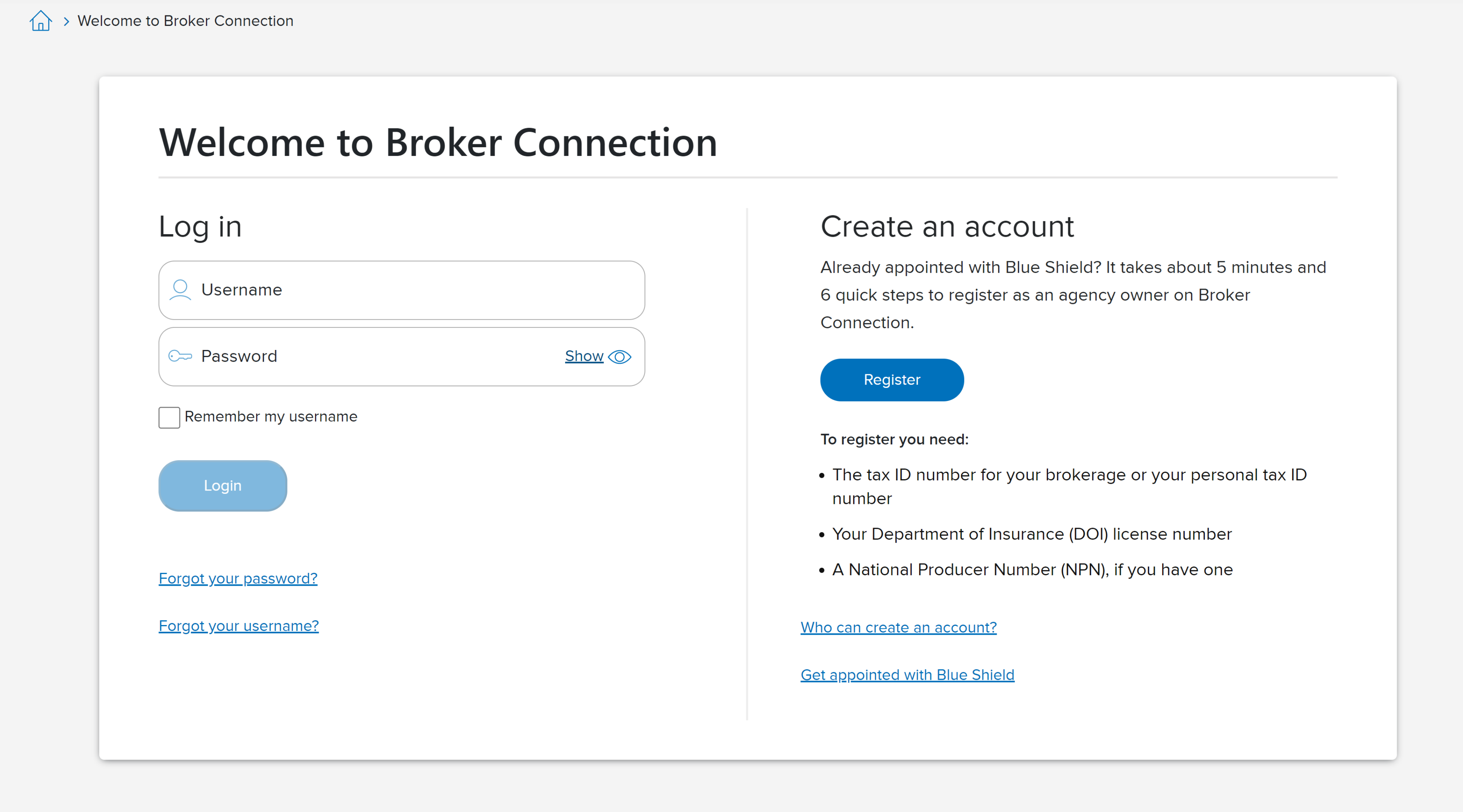
Reminder to Verify Email: If you log in without verifying your email, a reminder is displayed



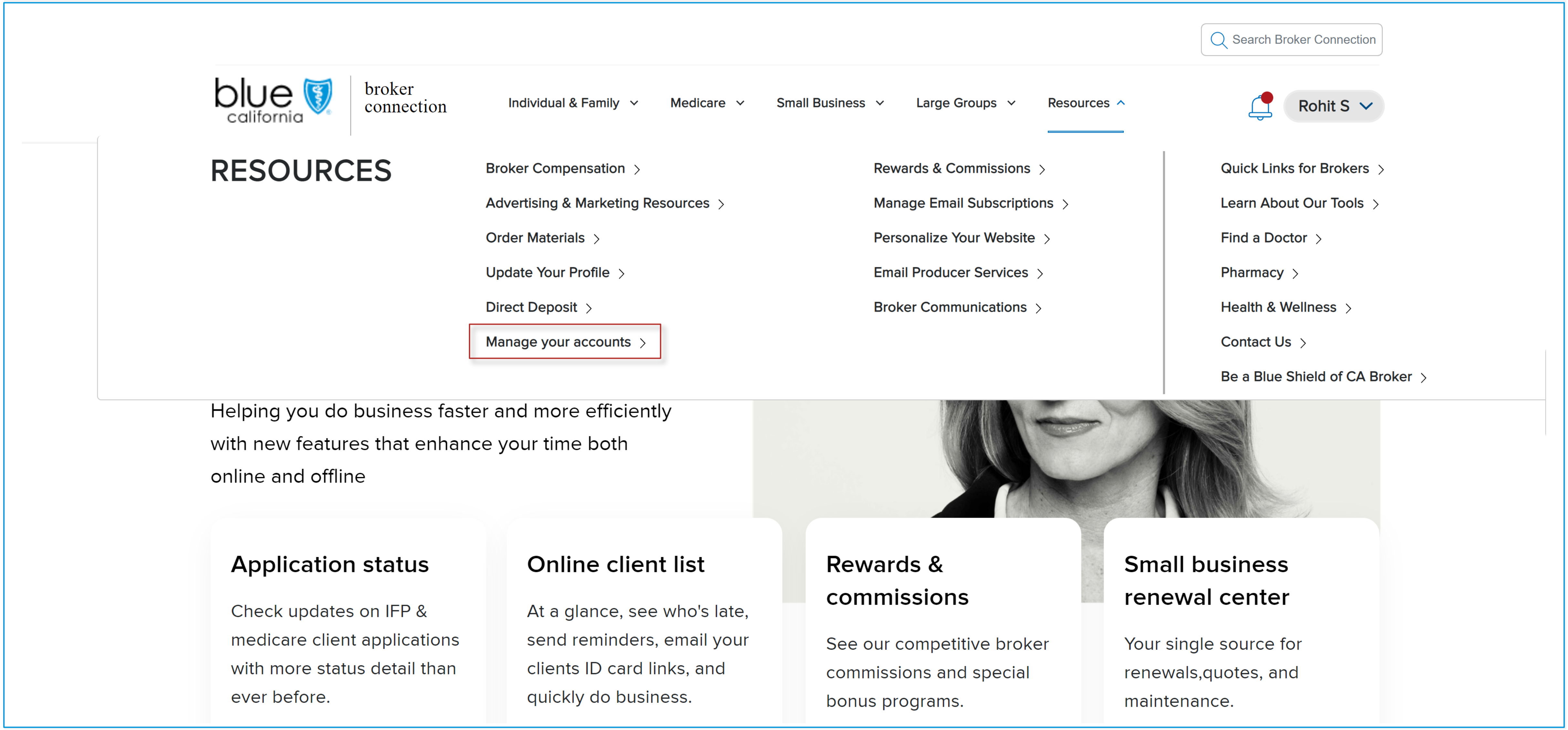
Broker Connection Home Page: Click the ***Log In or Register*** *button*



Step 1: Log In to Broker Connection



Step 2: Click the ***Resources Tab*** and select the ***Manage your accounts*** *option from the menu*



MANAGE BROKER CONNECTION ACCOUNTS

Create an account

Need help?

Pending accounts

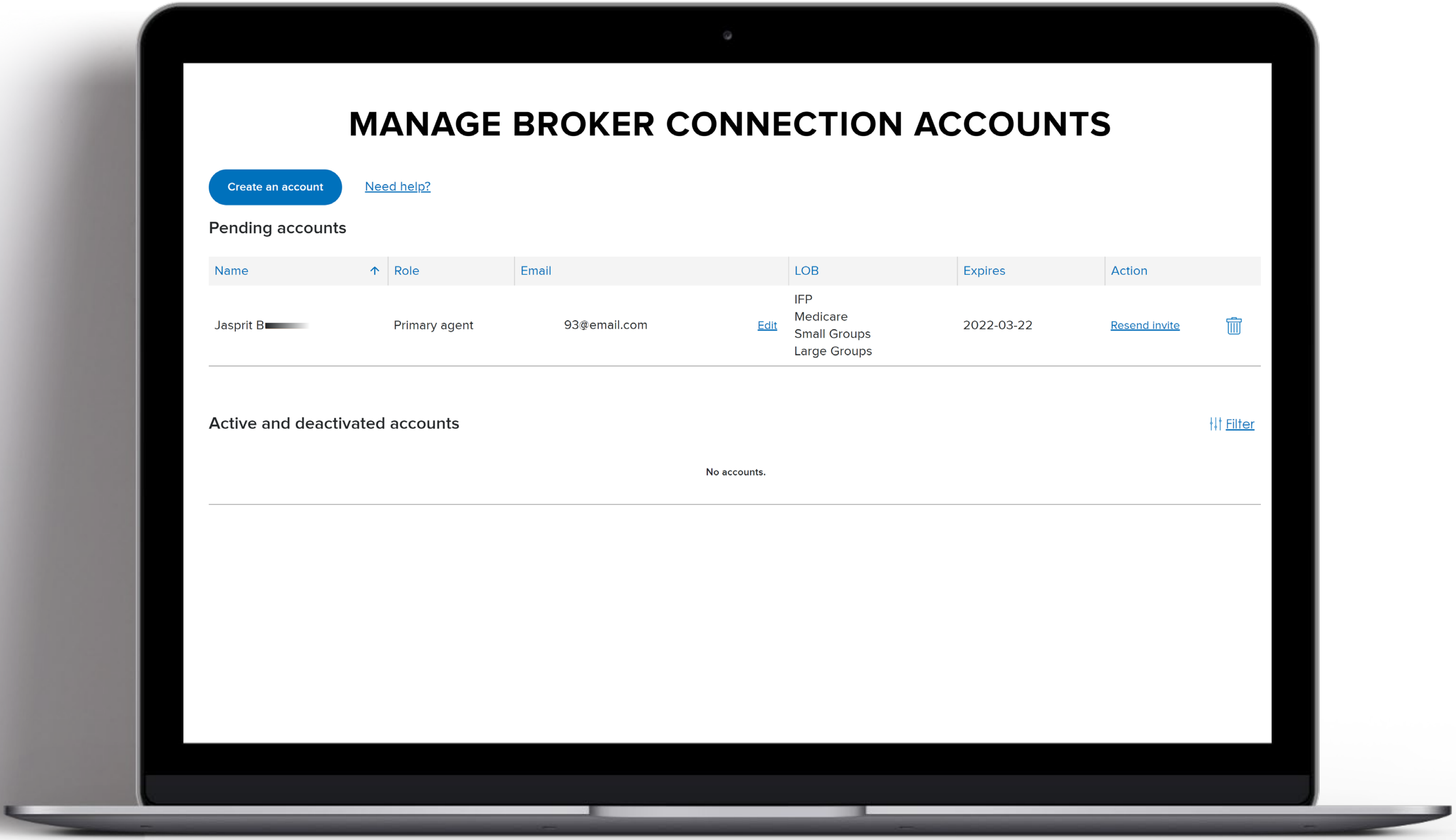
Name ↑	Role	Email		LOB	Expires	Action	
Jasprit B[redacted]	Primary agent	93@email.com	Edit	IFP Medicare Small Groups Large Groups	2022-03-22	Resend invite	

Active and deactivated accounts

Filter

No accounts.

Creating an Account



Step 1: Click the ***Create an Account*** button

MANAGE BROKER CONNECTION ACCOUNTS

Create an account

Need help?

Pending accounts

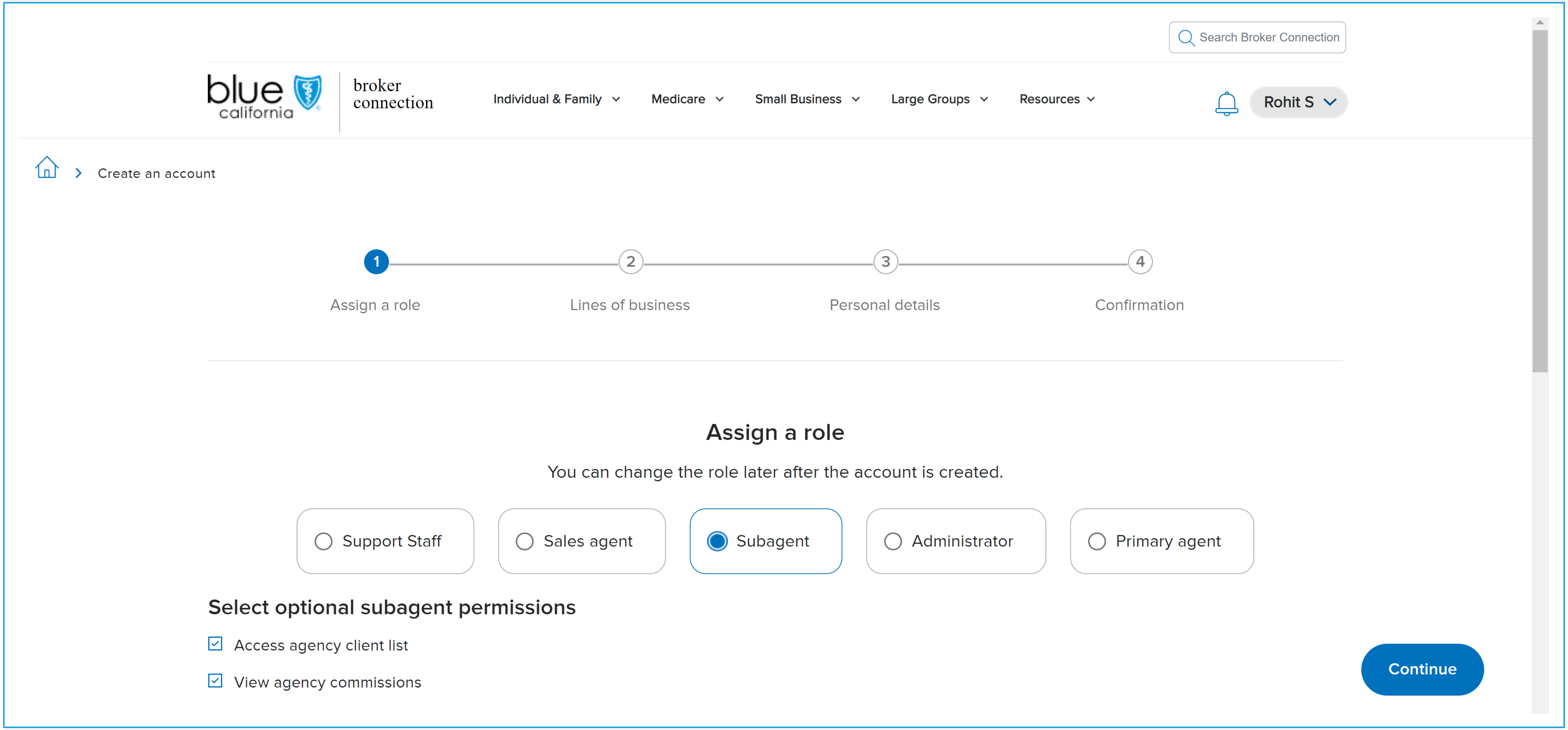
Name ↑	Role	Email		LOB	Expires	Action	
Jasprit B[redacted]	Primary agent	93@email.com	Edit	IFP Medicare Small Groups Large Groups	2022-03-22	Resend invite	

Active and deactivated accounts

Filter

No accounts.

Step 2: Assign appropriate role for user



Step 2 cont'd: Review permission levels assigned to each role

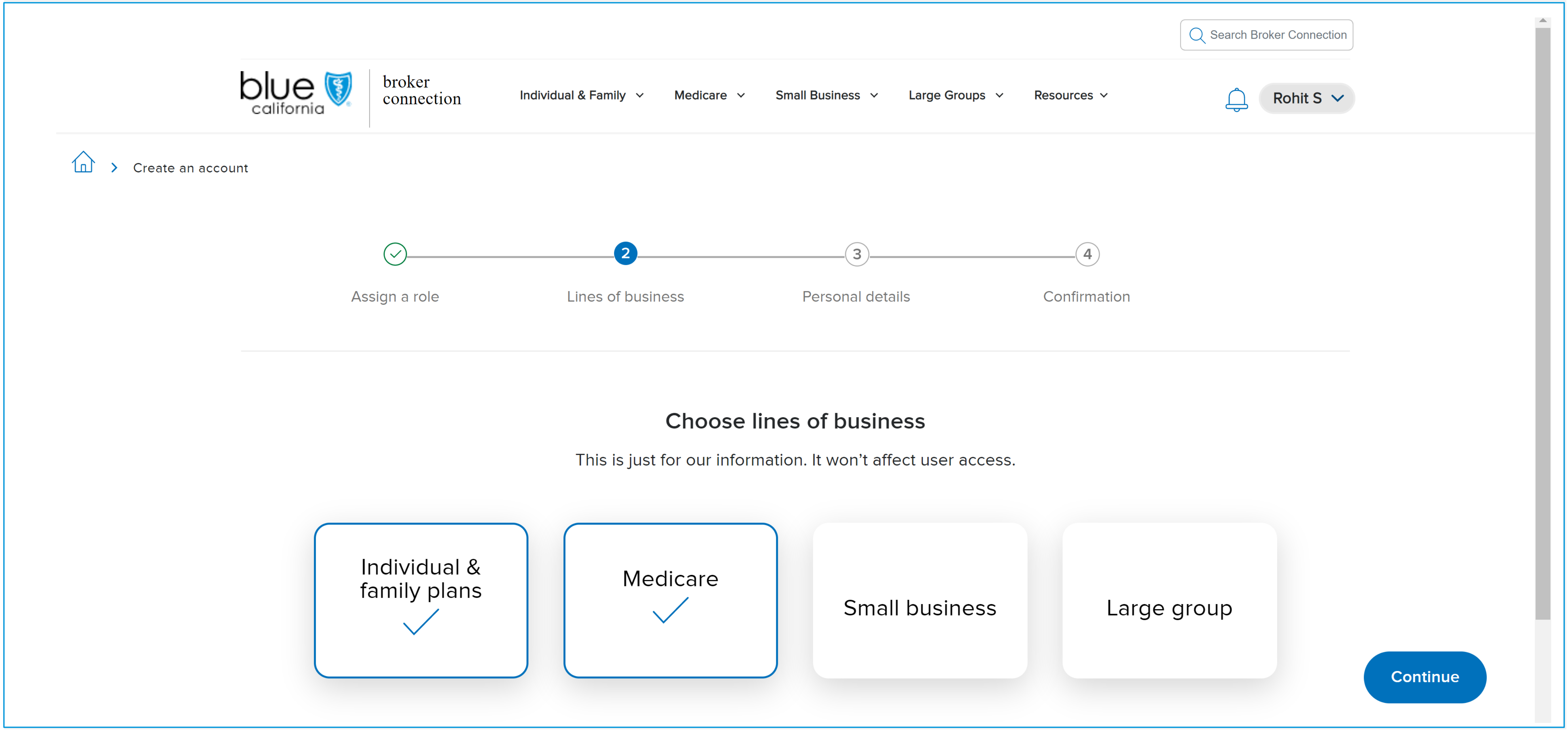
What can each role do?

	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					✔

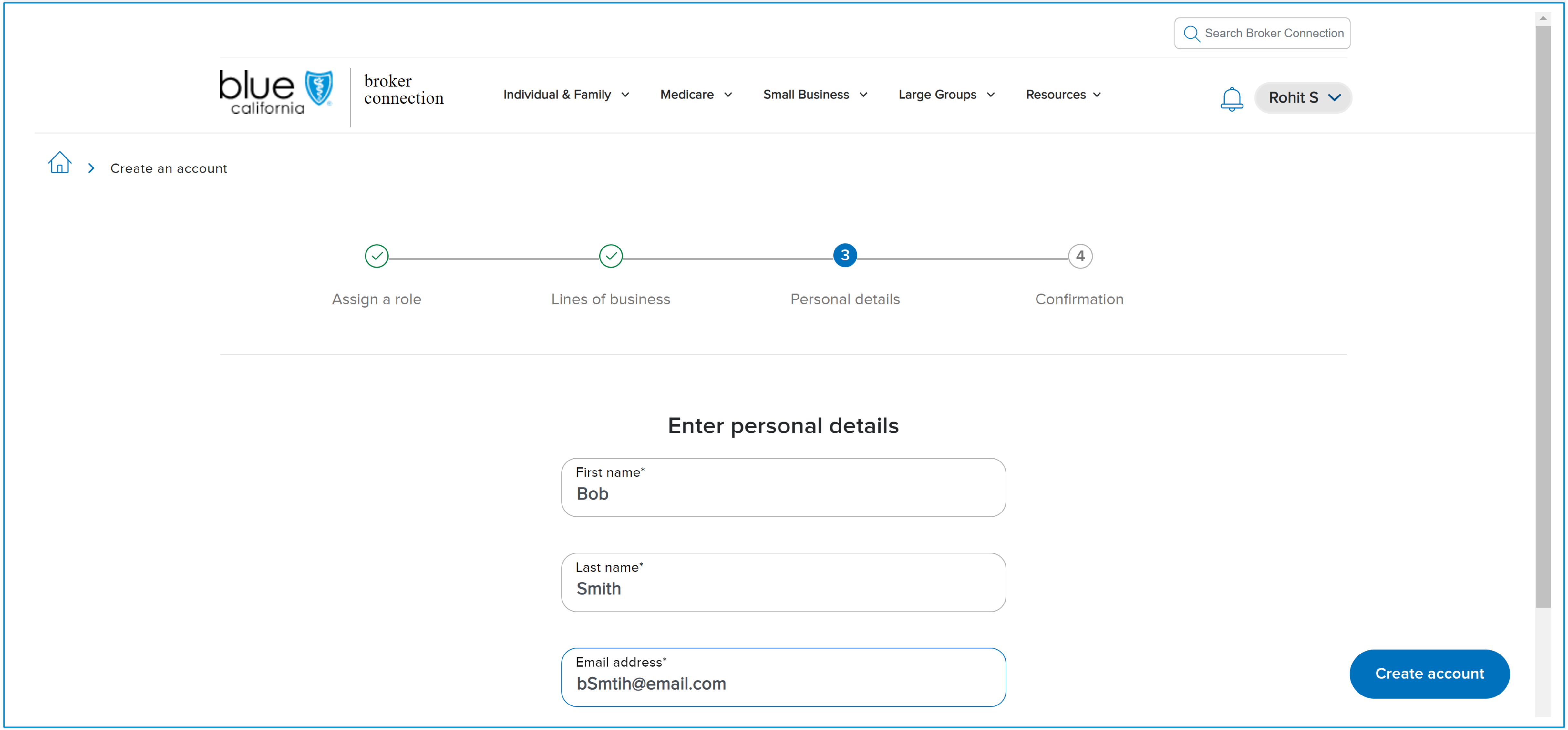
✓ **Optional**

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

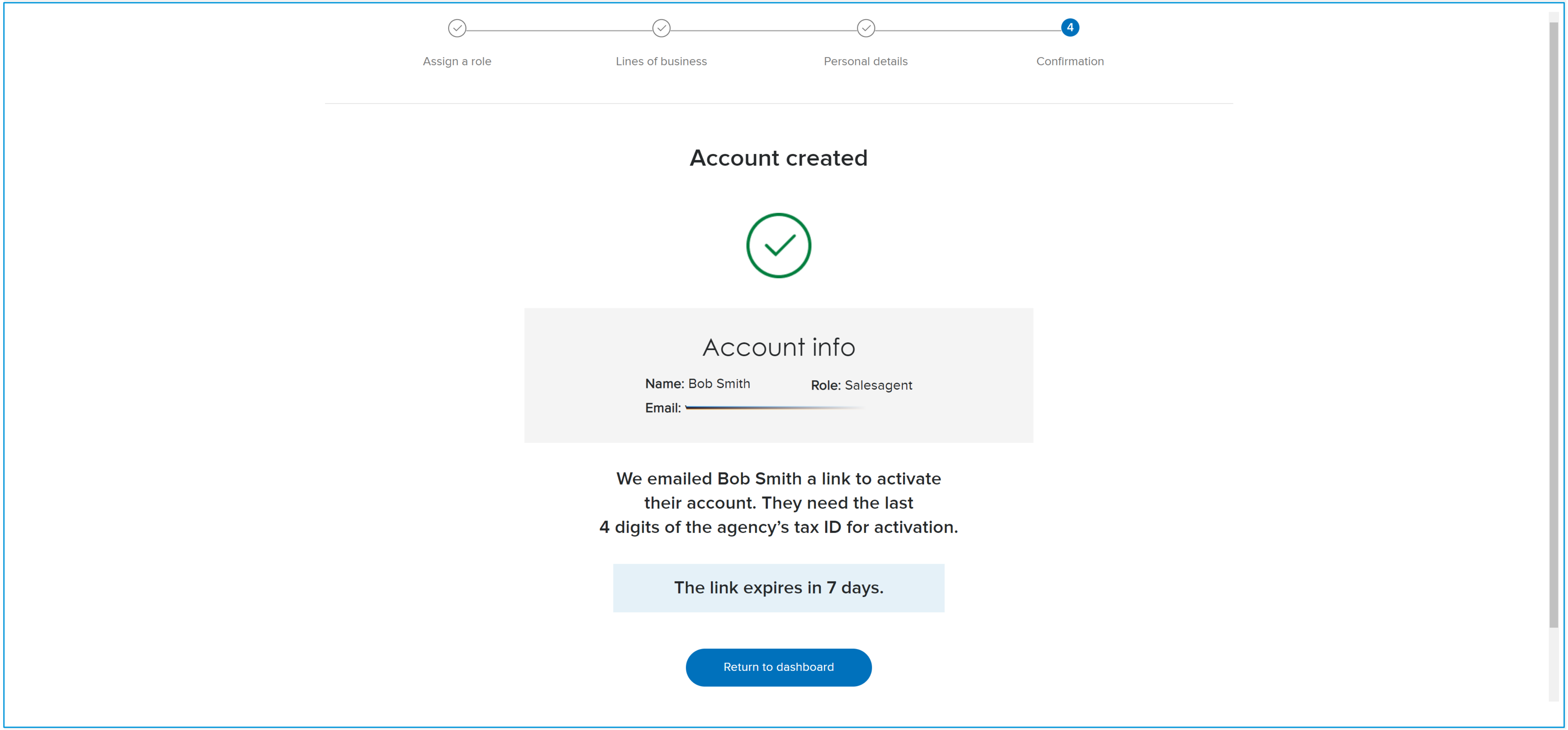
Step 3: Select the lines of business that the user will sell



Step 4: Enter the personal details to create the account and send the invite

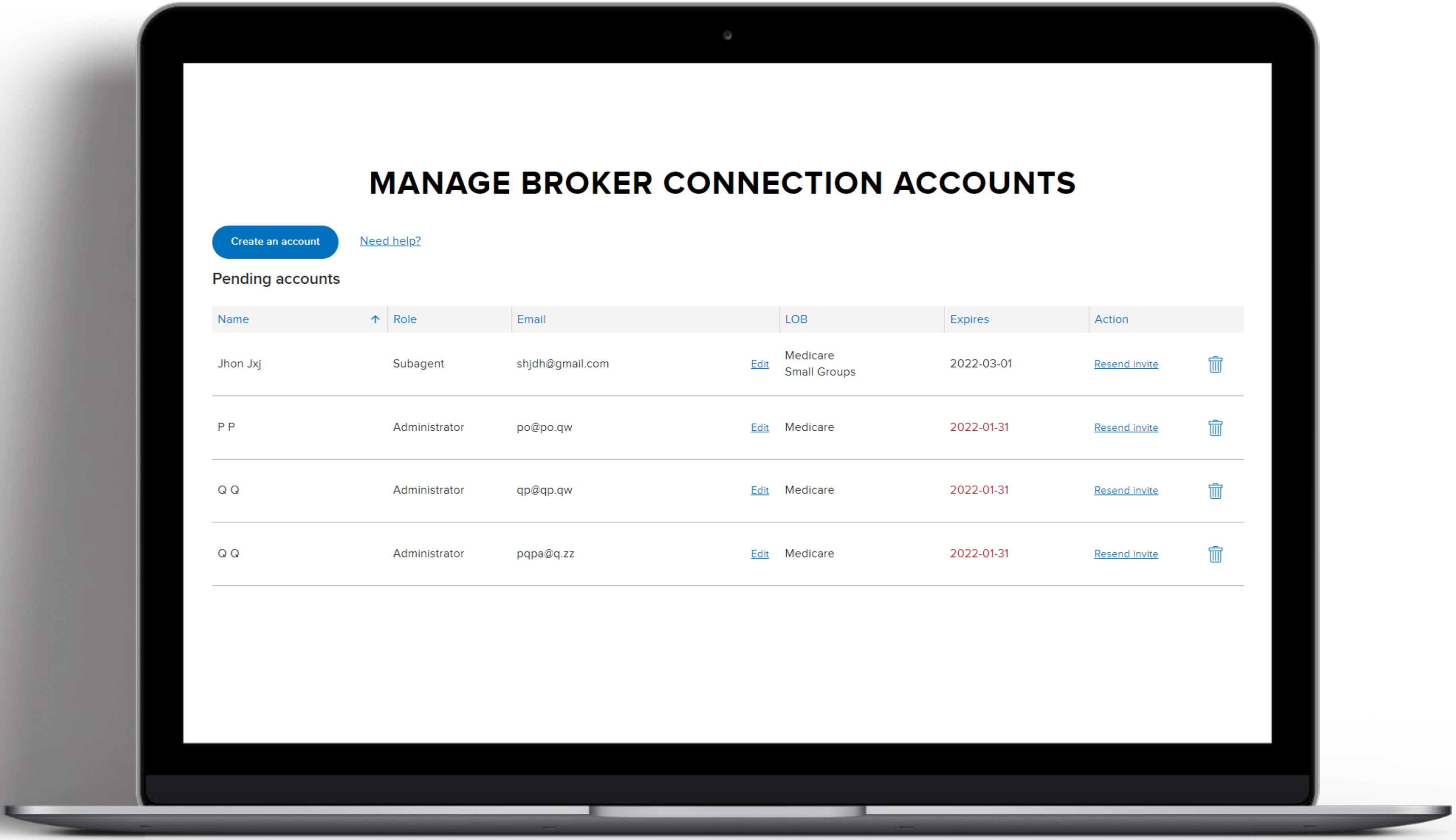


Step 5: A confirmation is displayed. Click the ***Return to Dashboard*** to exit this screen



For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Managing Accounts



MANAGE BROKER CONNECTION ACCOUNTS

Create an account   Need help?

Pending accounts

Name	Role	Email		LOB	Expires	Action	
Jhon Jxj	Subagent	shjdh@gmail.com	Edit	Medicare Small Groups	2022-03-01	Resend invite	
P P	Administrator	po@po.qw	Edit	Medicare	2022-01-31	Resend invite	
Q Q	Administrator	qp@qp.qw	Edit	Medicare	2022-01-31	Resend invite	
Q Q	Administrator	pqpa@q.zz	Edit	Medicare	2022-01-31	Resend invite	

Manage Accounts: Review Pending and Active/Deactivated accounts

Search Broker Connection

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

Rohit S

MANAGE BROKER CONNECTION ACCOUNTS

Create an account

Need help?

Pending accounts

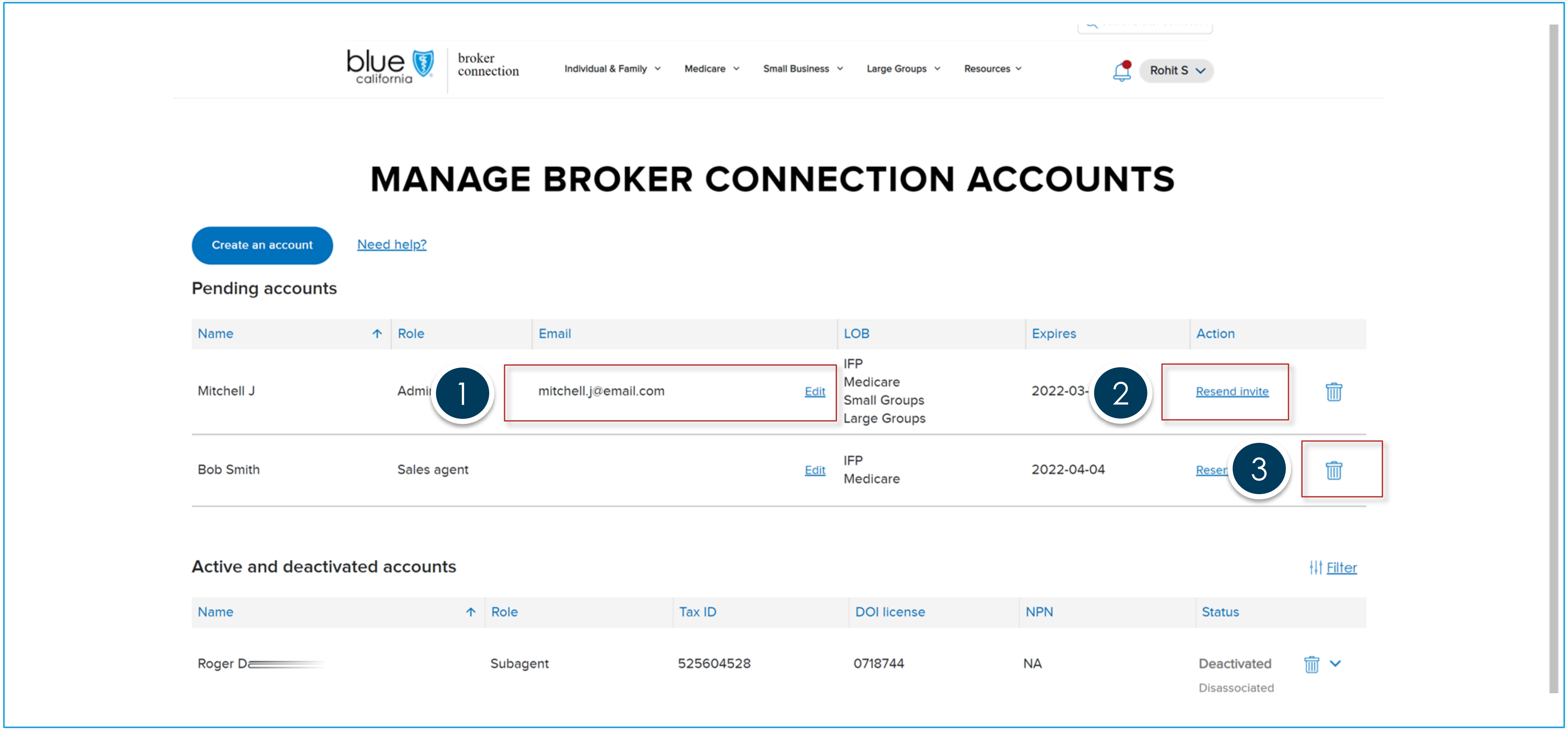
Name	Role	Email		LOB	Expires	Action	
Mitchell J	Administrator	mitchell.j@email.com	Edit	IFP Medicare Small Groups Large Groups	2022-03-25	Resend invite	
Bob Smith	Sales agent		Edit	IFP Medicare	2022-04-04	Resend invite	

Active and deactivated accounts

Filter

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

Manage Accounts: Pending Accounts Options



Manage Accounts: Active and Deactivated Accounts Options

Create an account

Need help?

Pending accounts

Name	Role	Email		LOB	Expires	Action	
Mitchell J[redacted]	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

Username

rogerdavalsantos39578

Email

759139578mlpstage@blueshieldca.com

Phone

NA

User information

1 **Change role**

Subagent

2
- ☐ Access agency client list
- ☐ View agency commissions

3 **Add/remove lines of business**
- ☑ IFP
- ☑ Medicare
- ☑ Small Groups
- ☑ Large Groups

4 **Account status**
- ○ Active
- ◉ Deactivated

This account is no longer associated with the agency.

Cancel | Save

Step 1: Click the ***Activate Account*** button in the invite email

Broker Connection

Maria Primary at created a Broker Connection account as **Sales agent** for you.

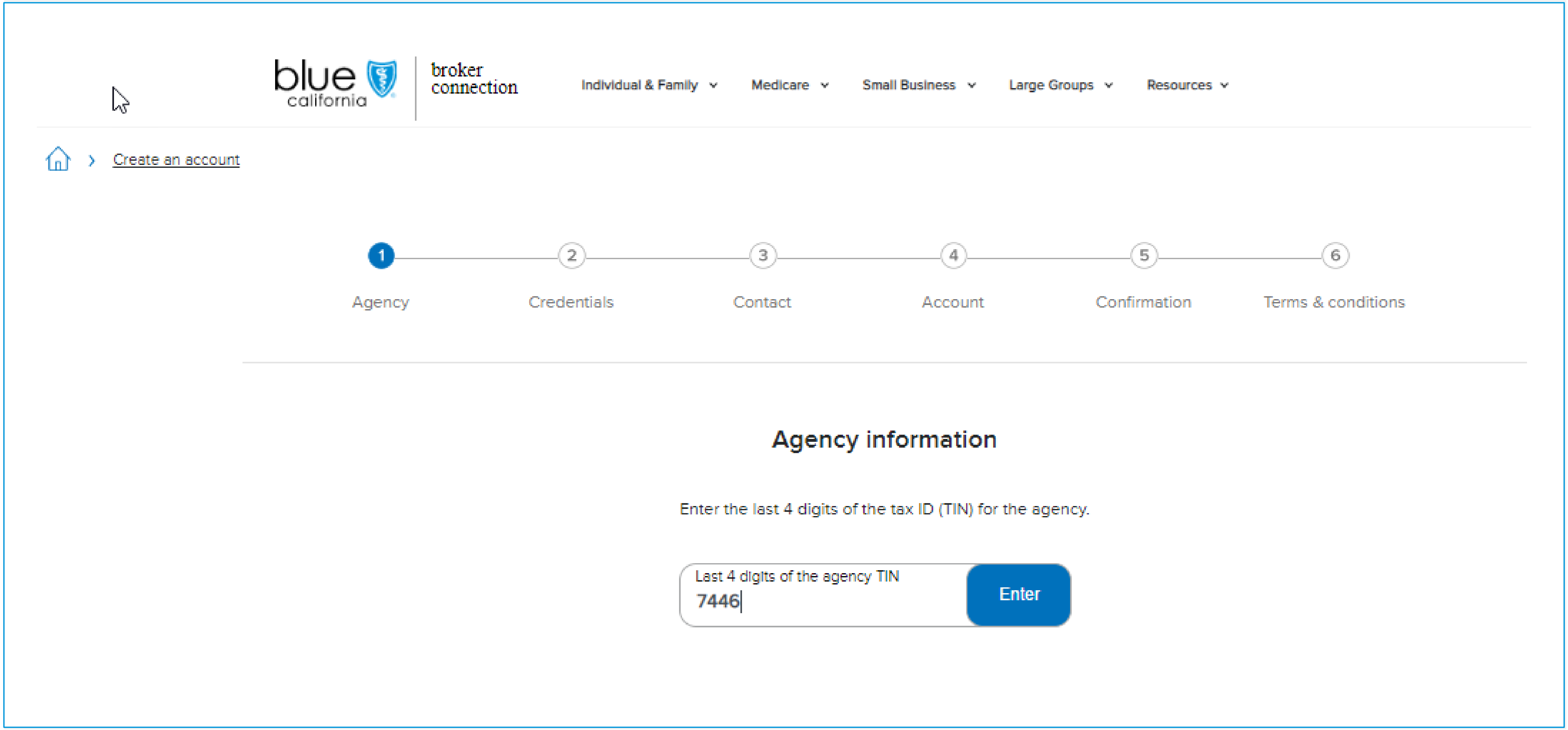
This invitation will expire in 7 days.

Activate account

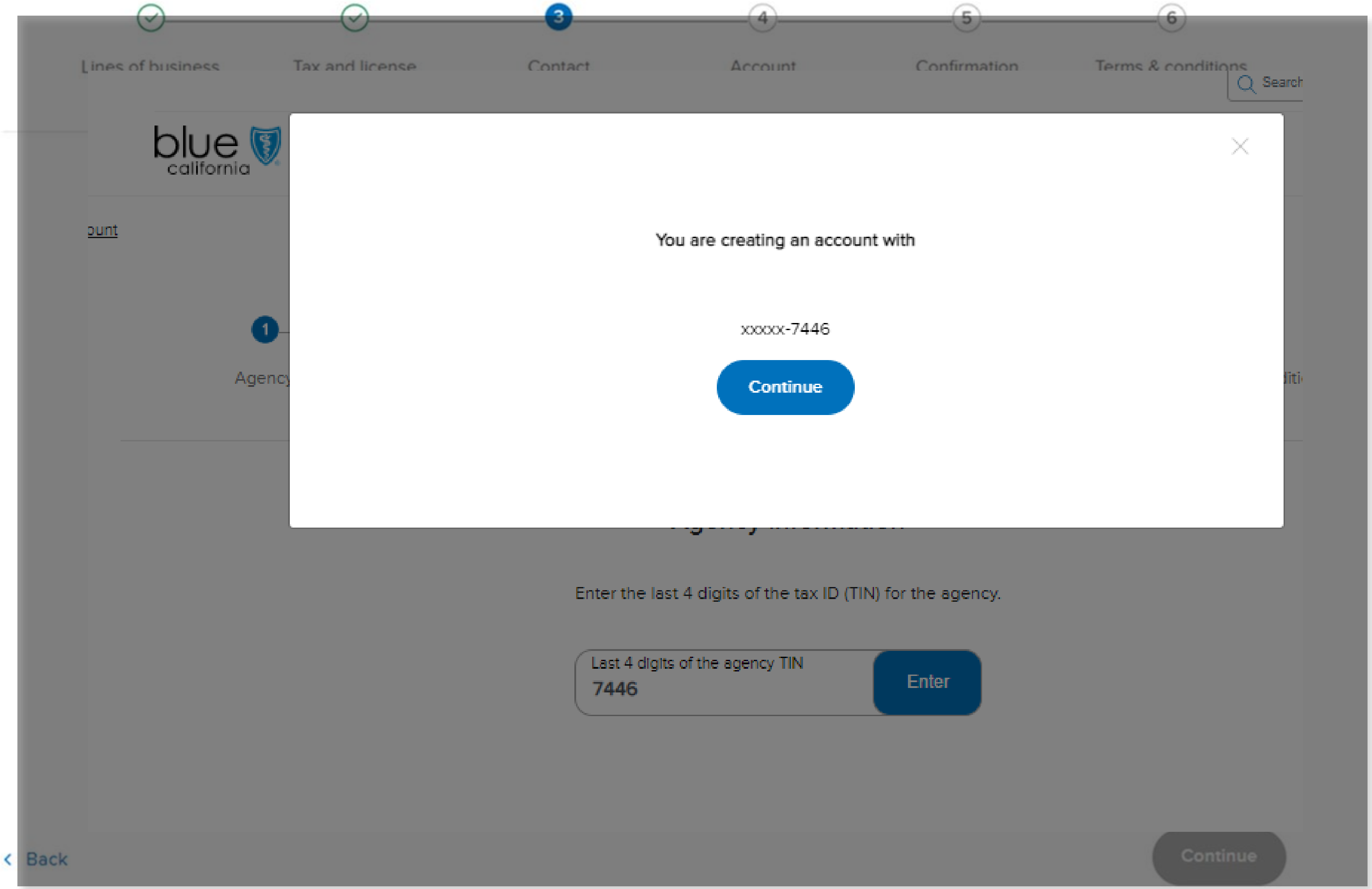
Note: You'll need the last 4 digits of the agency's tax ID number to activate your account.

Follow Blue Shield

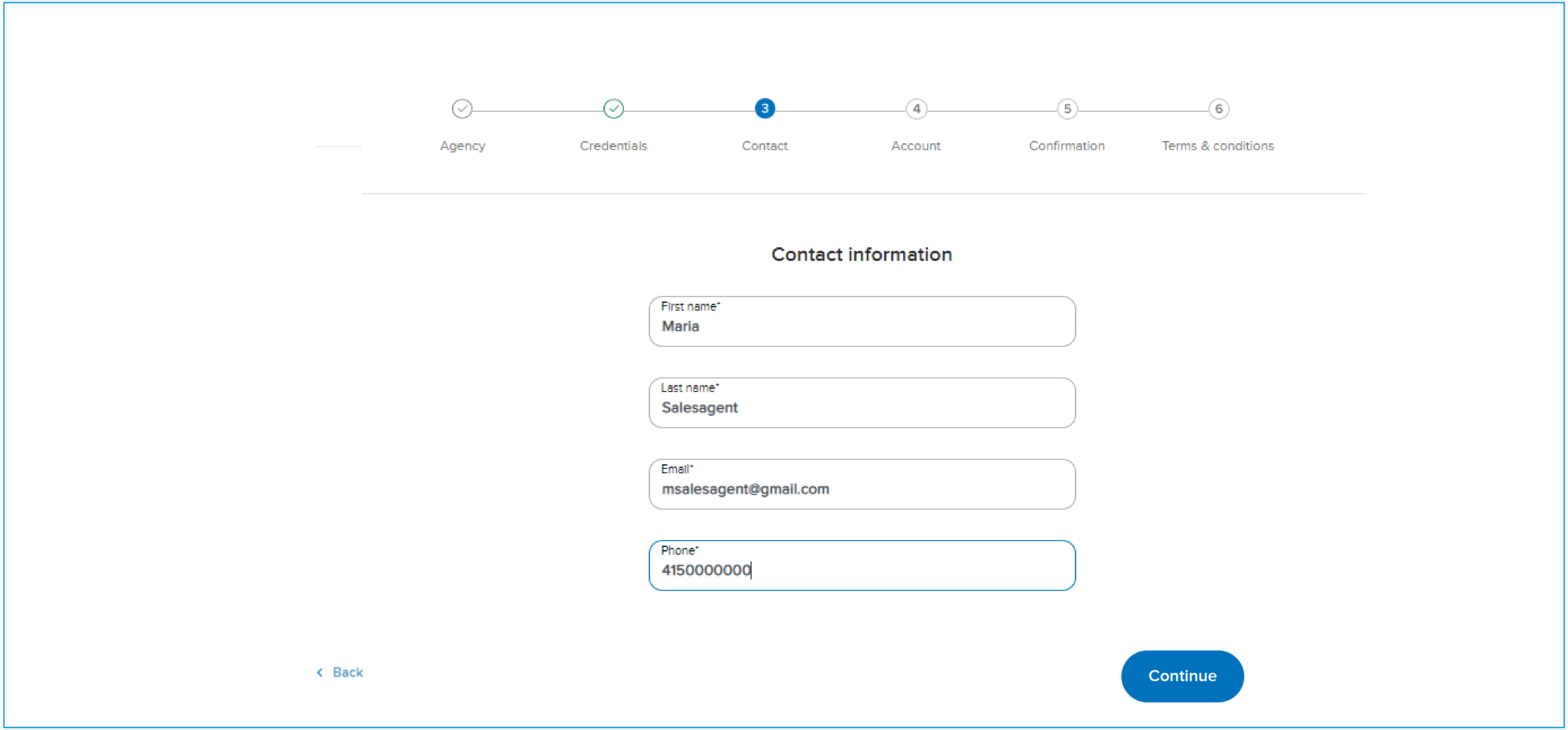
Step 2: Enter last 4 digits of agency TIN to validate and get started with secondary registration process



Step 3: After entering last 4 digits of Agency Tax ID, confirmation pop-up displays



Step 4: Sales agent enters contact details



Step 5: Sales agent enters unique username and password to complete account profile

Account setup

Create a username
mariasalesagent

Your username must be:

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

Create a password
Blue$hield1 Hide

Your password must include:

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

Confirm password
Blue$hield1 Hide

Continue

Step 6: Sales agent reviews profile and can edit details or proceed to Terms & Conditions

Agency | Credentials | Contact | Account | 5 Confirmation | 6 Terms & conditions

Confirm your information

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

Agency

Name	
Agency TIN	xxxxx-7446

Your broker credentials

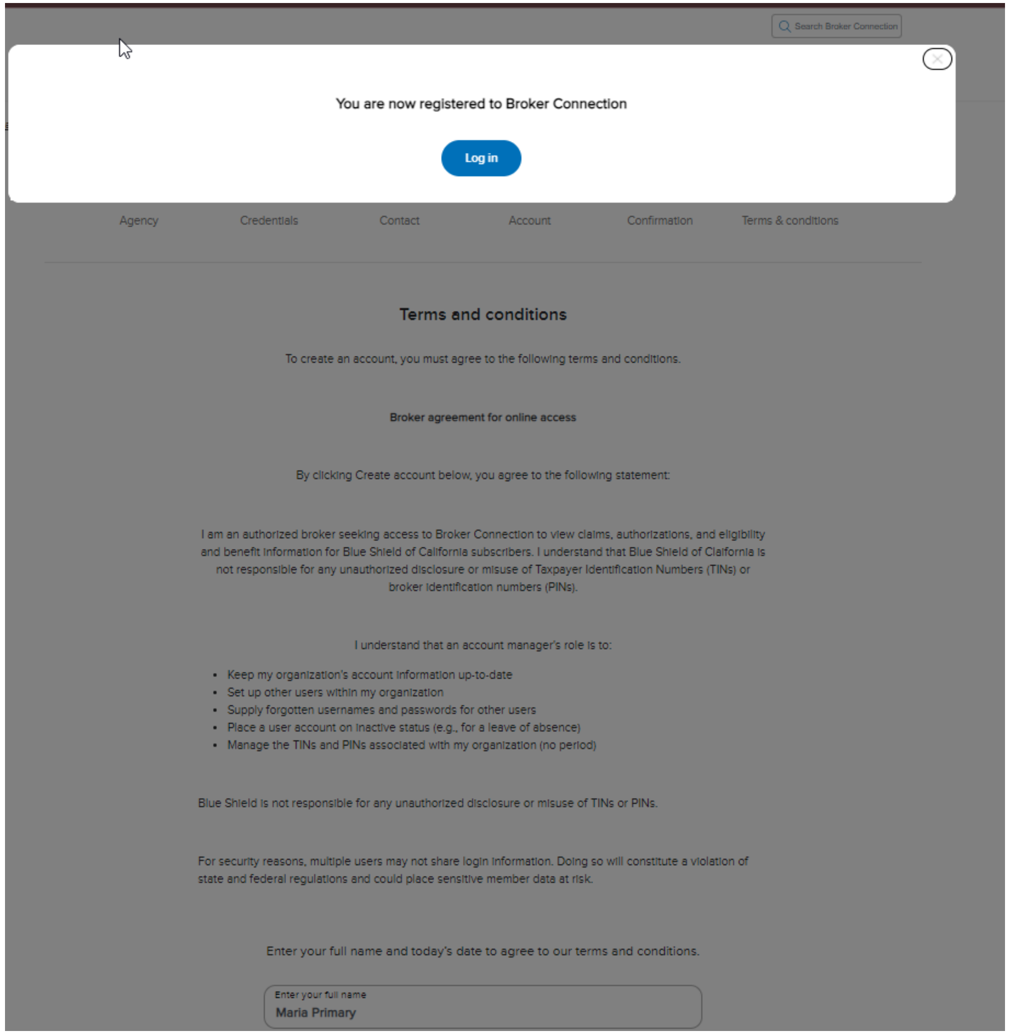
Tax ID	111111111
DOI license number	
NPN	22222

Contact

Name	Maria Salesagent

Continue

Step 7: Sales agent reviews and acknowledges Terms & Conditions completing registration



Step 1: User selects a response to the account question for an option to **Merge Accounts;** User will be brought to Broker Login screen if they select 'Yes' to start the merge account flow

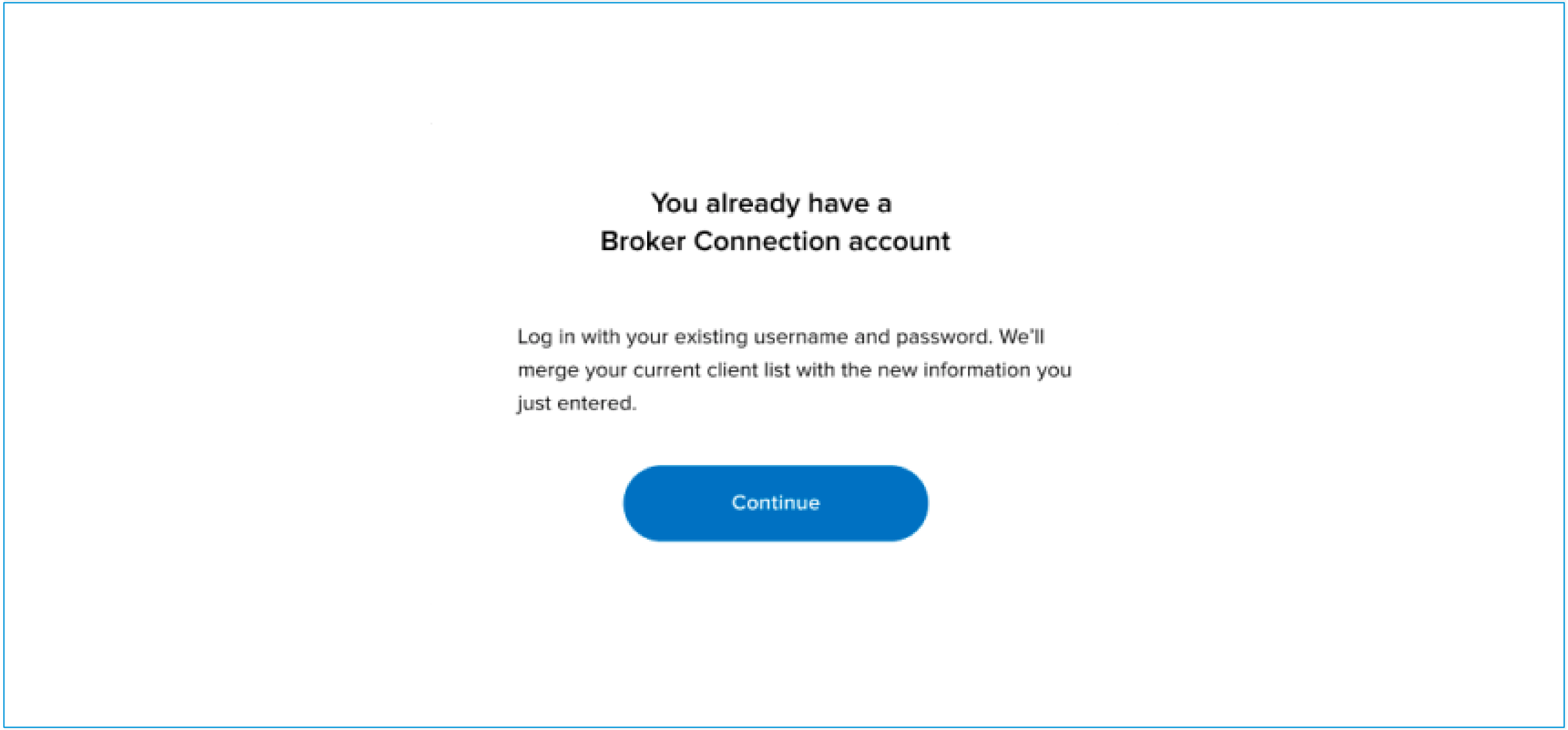
Do you already have a Broker Connection account?

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

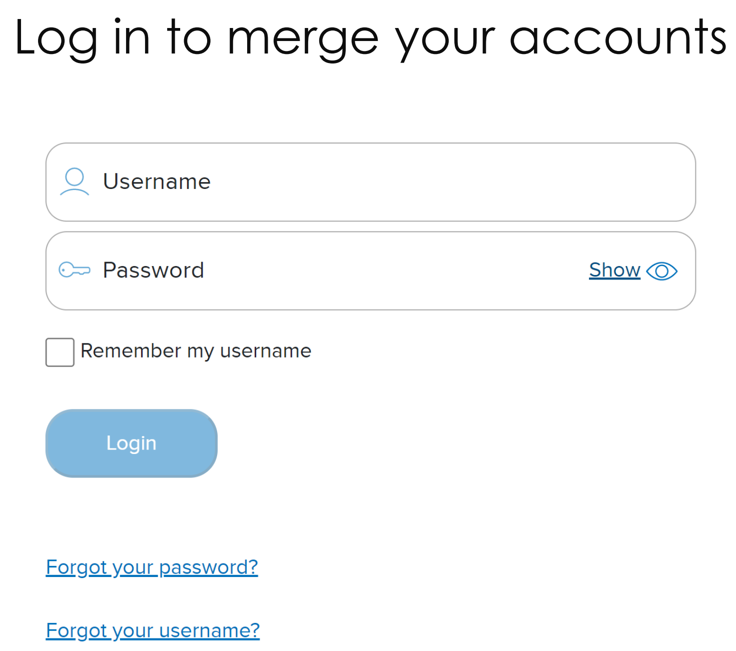
- Yes, I'll log in
- No, I need to create an account

Continue

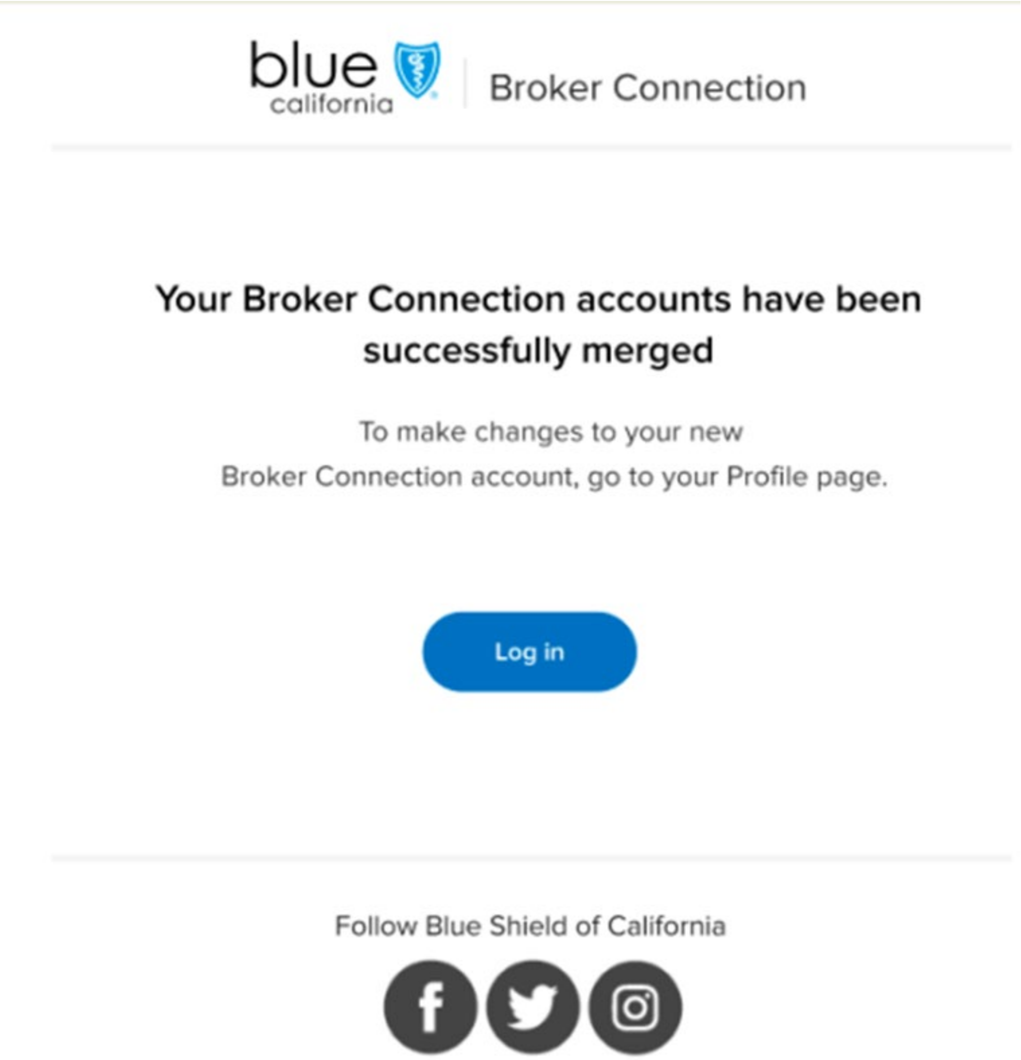
Step 2: System recognizes existing account and instructs Broker to merge accounts



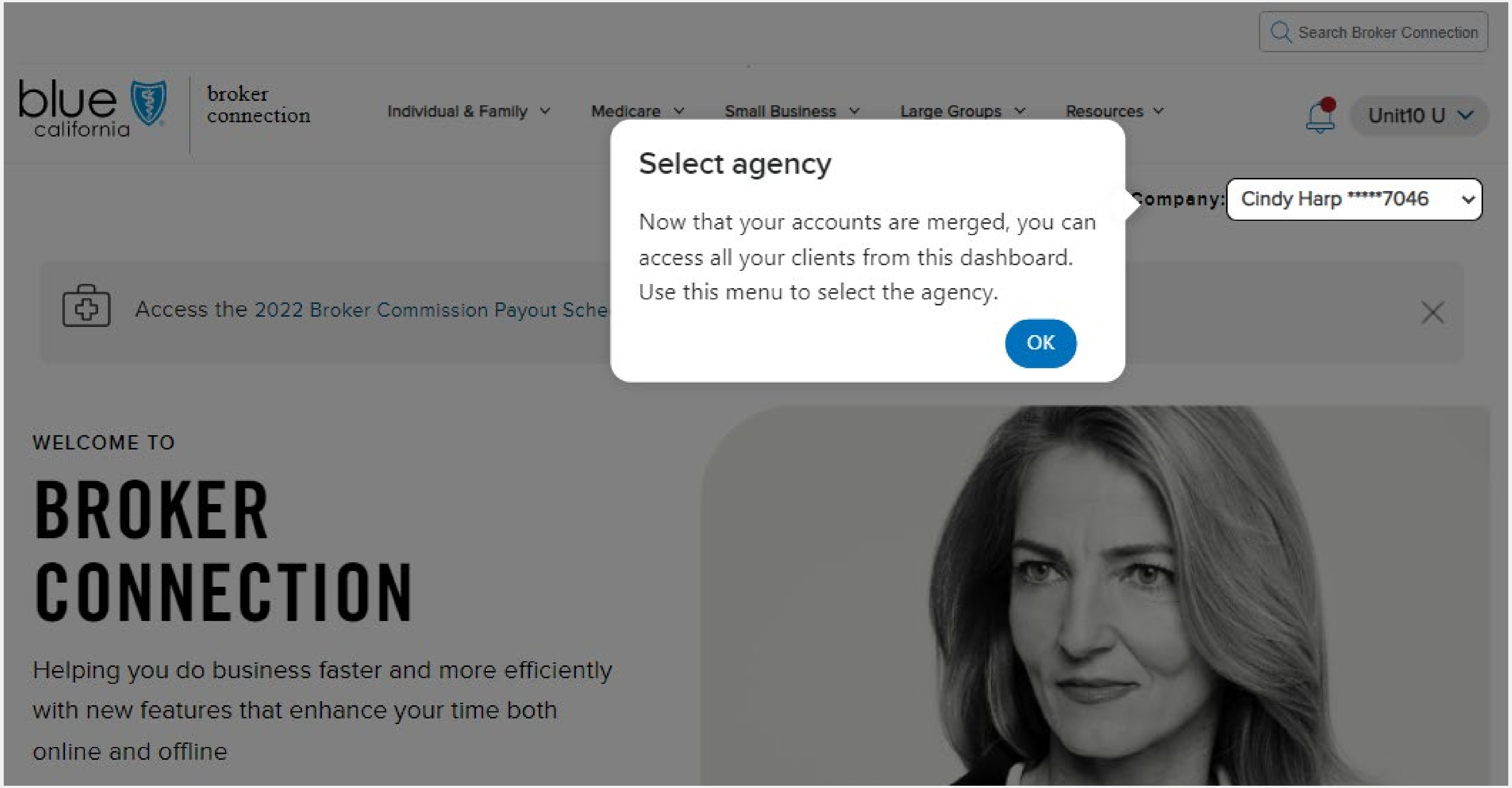
Step 3: Log in to merge your accounts



Step 4: A confirmation is displayed. Click the ***Log in*** button to return to Broker Connection



Step 5: Broker Connection Home Page: Authenticated User views **Context Switching** dropdown



Thank You

blue
california ®