



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

Search Broker Connection

blue california | broker connection | Individual & Family | Medicare | Small Business | Large Groups | Resources | [Log In or Register](#)

Access the [2022 Broker Commission Payout Schedule](#).

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](#)

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

 > Welcome to Broker Connection

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](#)

Step 1: Select the lines of business that you sell

 > [Create an account](#)



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



2

3

4

5

6

Lines of business

Tax and license

Contact

Account

Confirmation

Terms & conditions

Tax and license information

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

Agency TIN or your SSN* [?](#)

Department of Insurance (DOI) license number*

National Producer Number (NPN) [?](#)

Agency ZIP code*

Continue

Step 3: Enter your contact information



Contact information

Continue

Select a response to the account question

Lines of business

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

Phone*
4159410265

Ext.

Terms & conditions

Feedback

Step 4: Create your account username and password



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](#)



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).

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.



Continue

Step 7: Verify your email address – registration confirmation



broker
connection

Individual & Family ▾

Medicare ▾

Small Business ▾

Large Groups ▾

Resources ▾



> [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.

Close

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

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



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

Log in

Step 10: Log In to Broker Connection

 > Welcome to Broker Connection

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](#)

Broker Connection Home Page: Authenticated User

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

The screenshot displays the Broker Connect user interface. At the top left, the 'blue california' logo is visible next to the 'broker connect' text. A search bar labeled 'Search Broker Connection' is located in the top right. Below the logo, there is a button with a medical cross icon and the text 'Access the 202...'. The main heading reads 'WELCOME TO BROKER CONNECT'. Below this, a message states: 'Helping you do business faster and more efficiently with new features that enhance your time both online and offline'. A modal dialog box is centered on the screen with the title 'Verify new email address'. The dialog contains the text: 'Check your inbox (or spam) for an email for us. Follow the instructions to verify this new email address so that you can access your account.' Below this text, it says 'N/A' and a blue link 'Resend email'. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'. In the background, a 'Test U' dropdown menu and a notification bell icon are visible.



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

Search Broker Connection

blue california | broker connection | Individual & Family ▾ | Medicare ▾ | Small Business ▾ | Large Groups ▾ | Resources ▾ | [Log In or Register](#) 🔒

 Access the [2022 Broker Commission Payout Schedule](#). ✕

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](#)



Step 1: Log In to Broker Connection

 > Welcome to Broker Connection

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](#)

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

The screenshot shows the 'Resources' section of the Blue Shield of California Broker Connection website. The navigation bar includes 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. The 'Resources' menu is expanded, showing options like 'Broker Compensation', 'Advertising & Marketing Resources', 'Order Materials', 'Update Your Profile', 'Direct Deposit', 'Manage your accounts', 'Rewards & Commissions', 'Manage Email Subscriptions', 'Personalize Your Website', 'Email Producer Services', and 'Broker Communications'. The 'Manage your accounts' option is highlighted with a red box. To the right, there are quick links for brokers, including 'Quick Links for Brokers', 'Learn About Our Tools', 'Find a Doctor', 'Pharmacy', 'Health & Wellness', 'Contact Us', and 'Be a Blue Shield of CA Broker'. Below the menu, there is a section titled 'Helping you do business faster and more efficiently with new features that enhance your time both online and offline'. This section contains four feature cards: '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), and 'Small business renewal center' (Your single source for renewals, quotes, and maintenance).

MANAGE BROKER CONNECTION ACCOUNTS

Create an account

[Need help?](#)

Pending accounts

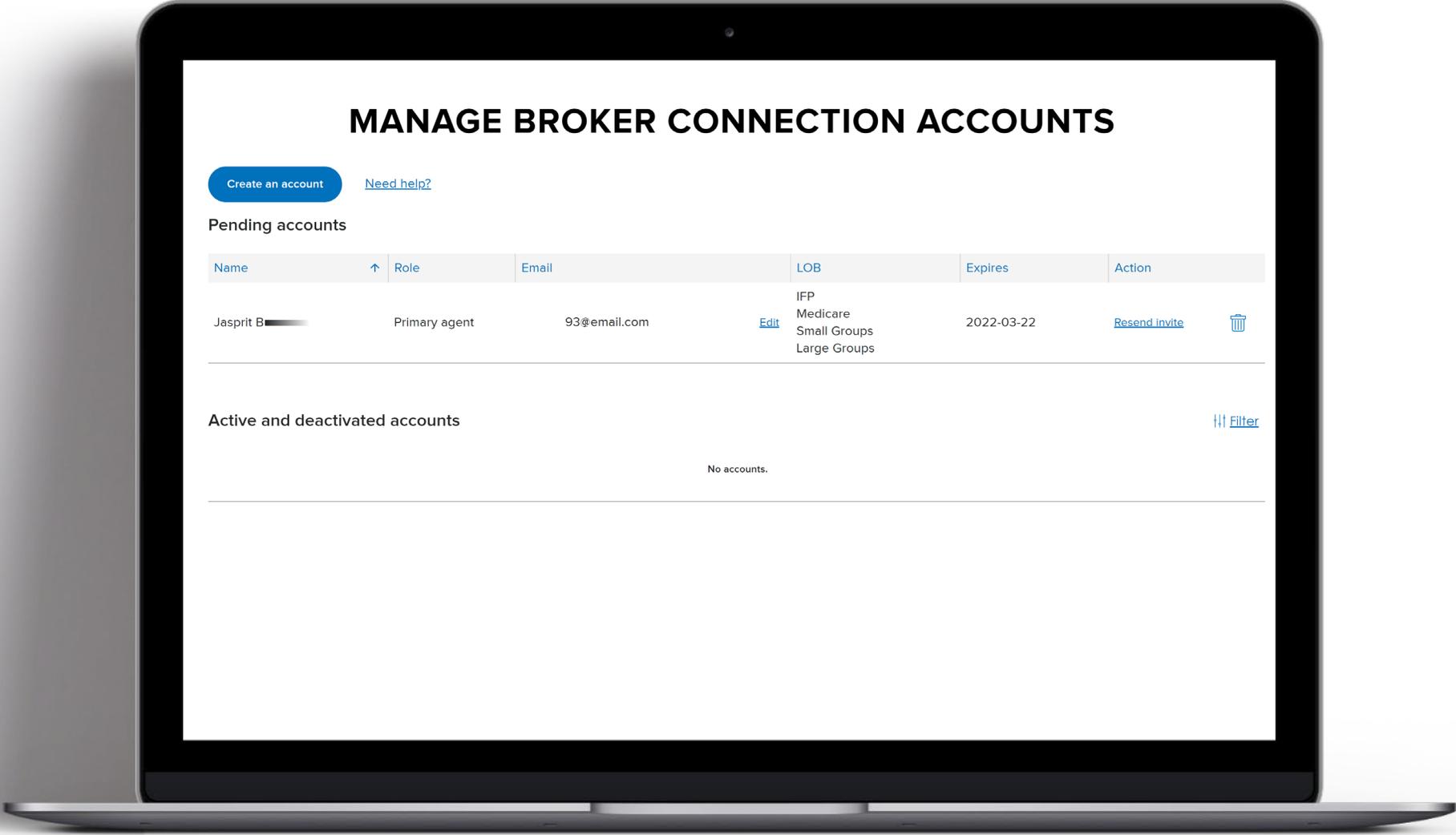
Name	Role	Email	LOB	Expires	Action
Jasprit B	Primary agent	93@email.com	IFP Medicare Small Groups Large Groups	2022-03-22	Resend invite 

Active and deactivated accounts

 [Filter](#)

No accounts.

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		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

broker connection

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

Rohit S ▾

> Create an account

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

Assign a role

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

Support Staff Sales agent Subagent Administrator Primary agent

Select optional subagent permissions

Access agency client list
 View agency commissions

Continue

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

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

Home > Create an account

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

Choose lines of business

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

Individual & family plans ✓ | Medicare ✓ | Small business | Large group

Continue

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

broker connection

Individual & Family ▾

Medicare ▾

Small Business ▾

Large Groups ▾

Resources ▾

Rohit S ▾

> Create an account

Progress bar with 4 steps: Assign a role (checked), Lines of business (checked), Personal details (active), Confirmation (next)

Enter personal details

First name*
Bob

Last name*
Smith

Email address*
bSmtih@email.com

Create account

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



Account created



Account info

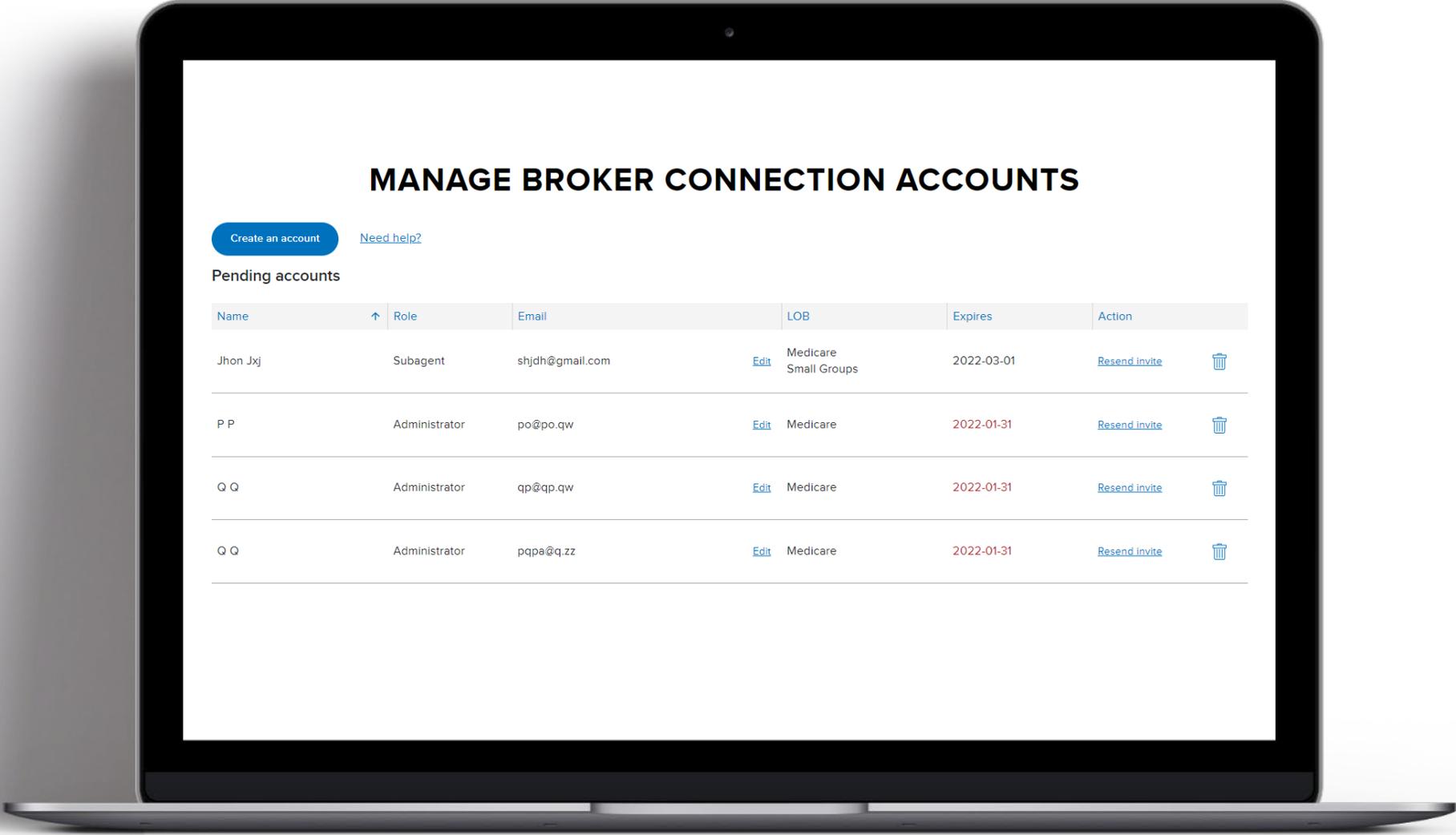
Name: Bob Smith Role: Salesagent
Email: _____

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

Managing Accounts



Manage Accounts: Review Pending and Active/Deactivated accounts



broker connection

Individual & Family

Medicare

Small Business

Large Groups

Resources

Search Broker Connection



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



broker connection

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	Admin 1	mitchell.j@email.com Edit	IFP Medicare Small Groups Large Groups	2022-03- 2	Resend invite
Bob Smith	Sales agent	Edit	IFP Medicare	2022-04-04	Reset 3

Active and deactivated accounts

[Filter](#)

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

Manage Accounts: Active and Deactivated Accounts Options

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

Active and deactivated accounts

[Filter](#)

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

Contact information

Username

rogerdavalosantos39578

Email

759139578mlpstage@blueshieldca.com

Phone

NA

User information

Change role

Subagent

- Access agency client list
- View agency commissions

Add/remove lines of business

- IFP
- Medicare
- Small Groups
- Large Groups

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



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

The screenshot shows the 'blue california' logo and 'broker connection' text at the top left. Navigation links include 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. A breadcrumb trail shows 'Home > Create an account'. A progress bar below the breadcrumb has six steps: 1. Agency (highlighted in blue), 2. Credentials, 3. Contact, 4. Account, 5. Confirmation, and 6. Terms & conditions.

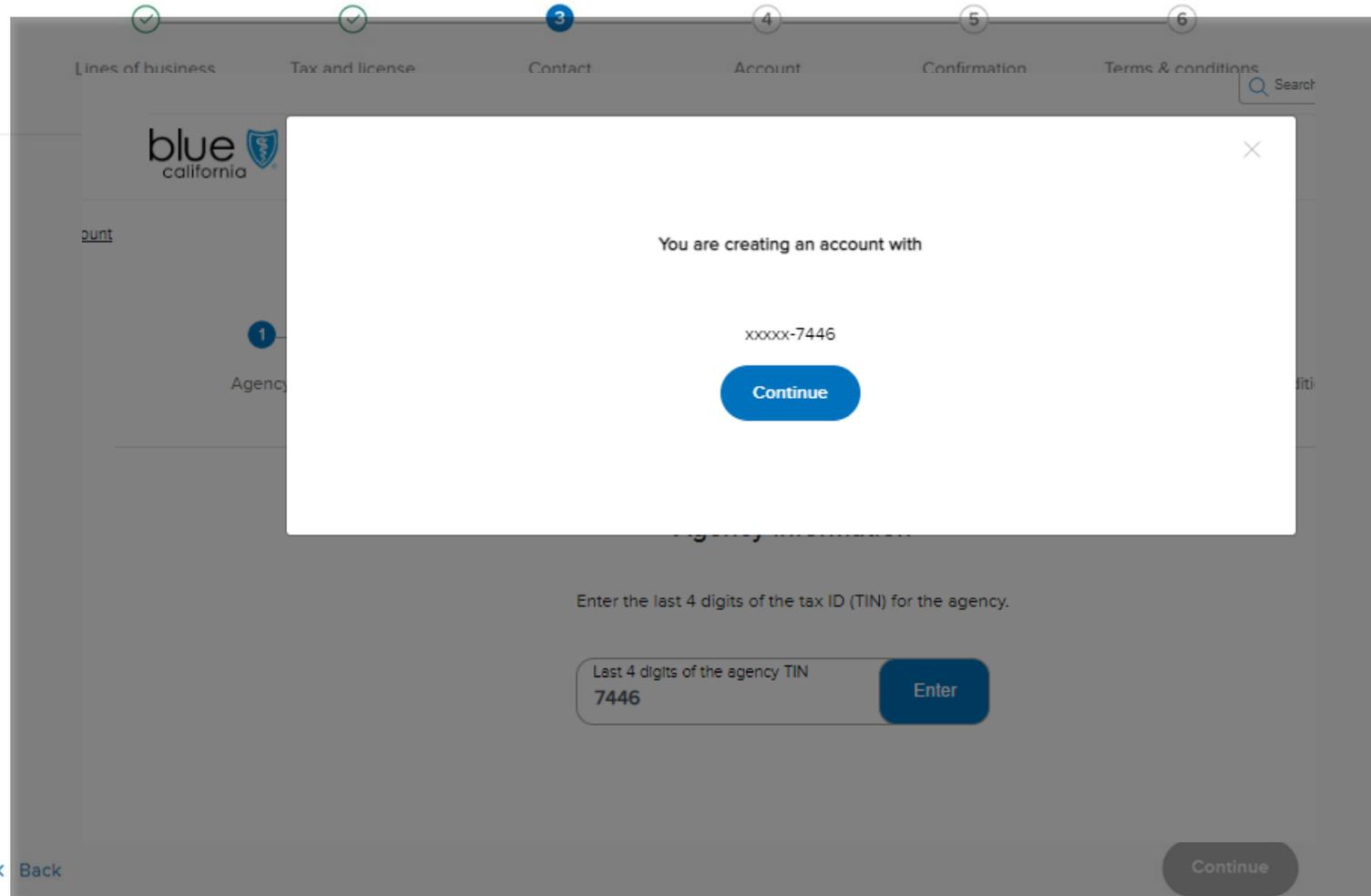
Agency information

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

Last 4 digits of the agency TIN
7446

Enter

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



Step 4: Sales agent enters contact details

Agency Credentials **3** 4 5 6

Agency Credentials Contact Account Confirmation Terms & conditions

Contact information

First name*
Maria

Last name*
Salesagent

Email*
msalesagent@gmail.com

Phone*
4150000000

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

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
- Unique identification
- Numbers and letters only
- No spaces

Create a password

 **Blue\$hield1** [Hide](#) 

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

 **Blue\$hield1** [Hide](#) 

[Continue](#)

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

11111111

DOI license number

NPN

22222

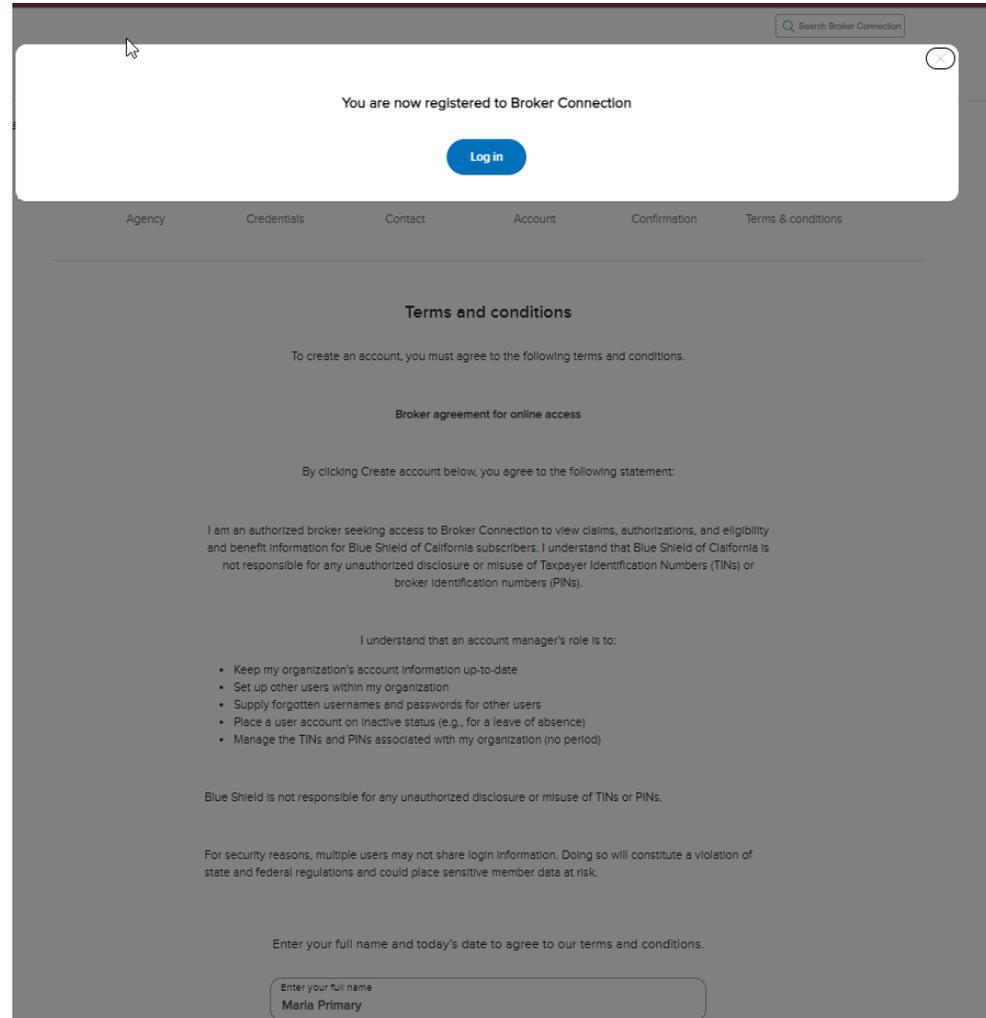
Contact

Name

Maria Salesagent

Continue

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



The screenshot shows a web interface for 'Broker Connection'. At the top, a white notification box states 'You are now registered to Broker Connection' with a 'Log in' button. Below this is a navigation bar with links for Agency, Credentials, Contact, Account, Confirmation, and Terms & conditions. The main content area is titled 'Terms and conditions' and contains the following text:

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).

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
Maria Primary

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

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

Step 3: Log in to merge your accounts

Log in to merge your accounts

 [Show](#)  Remember my username

[Forgot your password?](#)

[Forgot your username?](#)

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



**Your Broker Connection accounts have been
successfully merged**

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

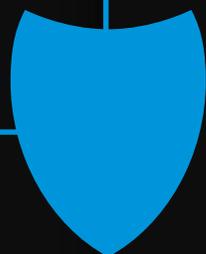
Log in

Follow Blue Shield of California



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

The screenshot shows the Blue Shield of California Broker Connection home page. At the top left is the Blue Shield of California logo. To its right is the text 'broker connection'. Further right are navigation links: 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. On the far right, there is a search bar labeled 'Search Broker Connection', a notification bell icon, and a user profile dropdown labeled 'Unit10 U'. Below the navigation is a 'Company:' dropdown menu showing 'Cindy Harp ****7046'. A modal dialog titled 'Select agency' is centered on the screen. The dialog contains the text: 'Now that your accounts are merged, you can access all your clients from this dashboard. Use this menu to select the agency.' and an 'OK' button. Below the modal, there is a banner with a medical cross icon and the text 'Access the 2022 Broker Commission Payout Sche'. At the bottom left, it says 'WELCOME TO BROKER CONNECTION' in large bold letters, followed by the text 'Helping you do business faster and more efficiently with new features that enhance your time both online and offline'. On the right side of the banner is a grayscale portrait of a woman.



Thank You



blue
california

