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

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

Log in

Username
Password
Remember my username
Login

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.

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

What lines of business do you sell?
Select all that apply.

- Individual & family plans
- Medicare
- Small business
- Large group
Step 2: Enter the tax and license information

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

First name*

Middle initial

Last name*

Email*

Phone* Ext.

Continue
Select a response to the account question

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.
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
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

Continue
## 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 |
Step 6: Review the terms and 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 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.

Enter your full name

Select today’s date

Continue
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.
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.
Step 10: Log In to Broker Connection

Welcome to Broker Connection

Log in

Username

Password

Remember my username

Login

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
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

Access the 2022 Broker Commission Payout Schedule.
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

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

Log in

- Username
- Password
- Remember my username

Login

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.

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.
# Manage Broker Connection Accounts

## Manage Accounts: Review Pending and Active/Deactivated accounts

### Manage Broker Connection Accounts

#### Pending accounts

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
<th>LOB</th>
<th>Expires</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jasprit B</td>
<td>Primary agent</td>
<td><a href="mailto:93@email.com">93@email.com</a></td>
<td>IFP Medicare Small Groups Large Groups</td>
<td>2022-03-22</td>
<td>Resend Invite</td>
</tr>
</tbody>
</table>

#### Active and deactivated accounts

No accounts.
Creating an Account

MANAGE BROKER CONNECTION ACCOUNTS

Pending accounts

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Jaspreet</td>
<td>Primary agent</td>
<td><a href="mailto:53@email.com">53@email.com</a></td>
<td>iFP Medicare Small Groups Large Groups</td>
<td>2022-03-22</td>
<td>Request invite</td>
</tr>
</tbody>
</table>

Active and deactivated accounts

No accounts.
Step 1: Click the **Create an Account** button

**MANAGE BROKER CONNECTION ACCOUNTS**

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<tr>
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<td>IFP</td>
<td>2022-03-22</td>
<td>Resend invite</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Medicare</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Small Groups</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Large Groups</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Active and deactivated accounts

No accounts.
Step 2: Assign appropriate role for user

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

Select optional subagent permissions
- Access agency client list
- View agency commissions

Continue
### What can each role do?

<table>
<thead>
<tr>
<th>Action</th>
<th>Support staff</th>
<th>Sales agent</th>
<th>Subagent</th>
<th>Administrator</th>
<th>Primary agent*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order sales materials</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Use enrollment tools</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Access their client list</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>View their commissions</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>View application status</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Access agency client list</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>View agency commissions</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Create and manage user accounts</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Update agency profile</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>Change direct deposit details</td>
<td></td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
</tr>
</tbody>
</table>

*Primary agents can create up to 4 other primary agent accounts.*
Step 3: Select the lines of business that the user will sell

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

Enter personal details

First name*
Bob

Last name*
Smith

Email address*
bSsmith@email.com

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

Account created

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.
### MANAGE BROKER CONNECTION ACCOUNTS

**Pending accounts**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
<th>LOG</th>
<th>Expires</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Aq</td>
<td>Subagent</td>
<td><a href="mailto:njq@gmail.com">njq@gmail.com</a></td>
<td>&quot;sb&quot;</td>
<td>Medicare Small Groups</td>
<td>2022-03-01</td>
</tr>
<tr>
<td>F F</td>
<td>Administrator</td>
<td><a href="mailto:fdfq@gmail.com">fdfq@gmail.com</a></td>
<td>&quot;sf&quot;</td>
<td>Medicare</td>
<td>2022-03-01</td>
</tr>
<tr>
<td>Q Q</td>
<td>Administrator</td>
<td><a href="mailto:qqqq@gmail.com">qqqq@gmail.com</a></td>
<td>&quot;plt&quot;</td>
<td>Medicare</td>
<td>2022-03-01</td>
</tr>
<tr>
<td>G G</td>
<td>Administrator</td>
<td><a href="mailto:qqqq@gmail.com">qqqq@gmail.com</a></td>
<td>&quot;plt&quot;</td>
<td>Medicare</td>
<td>2022-03-01</td>
</tr>
</tbody>
</table>
**Manage Accounts:** Review Pending and Active/Deactivated accounts

### Manage Broker Connection Accounts

**Pending accounts**

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<th>Expires</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mitchell J</td>
<td>Administrator</td>
<td><a href="mailto:mitchell.j@email.com">mitchell.j@email.com</a></td>
<td>IFP Medicare Small Groups Large Groups</td>
<td>2022-03-25</td>
<td>Resend Invite</td>
</tr>
<tr>
<td>Bob Smith</td>
<td>Sales agent</td>
<td></td>
<td>IFP Medicare</td>
<td>2022-04-04</td>
<td>Resend Invite</td>
</tr>
</tbody>
</table>

**Active and deactivated accounts**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Tax ID</th>
<th>DOI license</th>
<th>NPN</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger D</td>
<td>Subagent</td>
<td>525604528</td>
<td>0718744</td>
<td>NA</td>
<td>Deactivated Disassociated</td>
</tr>
</tbody>
</table>
MANAGE BROKER CONNECTION ACCOUNTS

Pending accounts

<table>
<thead>
<tr>
<th>Name</th>
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<th>Email</th>
<th>LOB</th>
<th>Expires</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mitchell J</td>
<td>Admin</td>
<td><a href="mailto:mitchell.j@email.com">mitchell.j@email.com</a></td>
<td>IPP Medicare Small Groups Large Groups</td>
<td>2022-03-1</td>
<td>Resend invite</td>
</tr>
<tr>
<td>Bob Smith</td>
<td>Sales agent</td>
<td></td>
<td>IPF Medicare</td>
<td>2022-04-0</td>
<td>Reset</td>
</tr>
</tbody>
</table>

Active and deactivated accounts

<table>
<thead>
<tr>
<th>Name</th>
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</thead>
<tbody>
<tr>
<td>Roger D</td>
<td>Subagent</td>
<td>525604528</td>
<td>0718744</td>
<td>NA</td>
<td>Deactivated, Disassociated</td>
</tr>
</tbody>
</table>
Manage Accounts: Active and Deactivated Accounts Options

Pending accounts

<table>
<thead>
<tr>
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<th>LOB</th>
<th>Expires</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mitchell J</td>
<td>Administrator</td>
<td><a href="mailto:mitchell.j@email.com">mitchell.j@email.com</a></td>
<td>Medicare Small Groups Large Groups</td>
<td>2022-03-25</td>
<td>Resend invite</td>
</tr>
</tbody>
</table>

Active and deactivated accounts

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Tax ID</th>
<th>DOI license</th>
<th>NPN</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger Daval Santos</td>
<td>Subagent</td>
<td>525604528</td>
<td>0718744</td>
<td>NA</td>
<td>Deactivated</td>
</tr>
</tbody>
</table>

Contact Information

- Username: rogerdavalosantos39578
- Email: 759139578mlpsstage@blueshieldca.com
- Phone: NA

User Information

1. Change role
   - Subagent
2. Access agency client list
3. View agency commissions
4. Add/remove lines of business
   - IFP
   - Medicare
   - Small Groups
   - Large Groups
5. Account status
   - Active
   - Deactivated
   - This account is no longer associated with the agency.

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

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

Contact information

First name*: Maria
Last name*: Salesagent
Email*: mssalesagent@gmail.com
Phone*: 4150000000

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
- Numbers and letters only
- Unique identification
- No spaces

Create a password
Blue$hi$$eld1

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$hi$$eld1
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
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

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

Username

Password

Remember my username

Login

Forgot your password?

Forgot your username?
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

Select agency

Now that your accounts are merged, you can access all your clients from this dashboard. Use this menu to select the agency.
Thank You