New Broker Appointment
2023

Begin
Introduction

This job aid will walk you through the process of:

- Registering/Creating an Account & Logging In
- Starting an Appointment Application
- Signing & Uploading Documents
- Reviewing a Submitted Application
Creating an Account

In this section you will learn the process of registering and logging into your account.
Creating an Account

Step 1:

Navigate to BSC Website and click Broker on the top right corner of the Webpage. Navigate to the Broker Connect homepage and click the Get Appointed button.
Creating an Account

Step 2:
Select the *lines of business* you sell and click *Continue*.

Step 3:
Add the *Tax and license information* and click the *Continue* button.

NOTE: If the broker is already appointed, deselect the checkbox to continue.
Creating an Account

**Step 4:**

Complete the **Tax and license information** and click continue. ( *Required fields if you are already appointed with Blue Shield)
Creating an Account

Step 5:
Enter your Contact information and click the Continue button.

Step 6:
Create a username and password and click the Continue button.

NOTE: If the Producer type is an individual, the Agency name field will not be displayed.
Creating an Account

Step 7:
Confirm your account information and click the **Continue** button.

Step 8:
Review the **Terms and conditions**. Enter your **full name**, **today’s date** and click the **I agree** button.

**NOTE:** After clicking **I agree**, check your inbox. You will receive an email requesting that you confirm your email address.
Logging In

Step 9:
Check your email inbox and Click the Verify email button. You are now registered with Broker Connection.

Step 10:
Once your email has been verified, you can now log into Broker Connection. Click the Log in button.

Thank you for registering with Broker Connection

First name: Joe
Last name: Smith
Agency: Searchbloom LLC
Username: joe123456

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

Log in
Step 11:
Enter your **Username** and **Password** that you created in the prior steps and click the **Login** button to continue.

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

**NOTE:** You will have limited access to certain features (i.e., application status, commissions, etc.) until you are fully appointed with Blue Shield.
Logging In

Step 12:
After you log in, click on Get appointed which will take you to the Broker appointment application.

NOTE: You will get full access to Broker Connection when you are appointed with Blue Shield and receive your Welcome email.
Start My Application

This section will walk you through completing a broker appointment application.
Start My Application

**Step 1:**
Once logged in, you will be taken to the landing page. Click *Required Documents* to view the document needed to complete your application.

**Step 2:**
Review and gather the necessary documents and click *Start my application.*
Producer Information

Step 3:
Complete all required fields in the Producer Information section.

Step 4:
Click the Validate button.

NOTE: When manually adding address, the State field is a dropdown with all 50 states listed along with DC.
Step 5:

Complete all required fields on the Electronic Appointment form and select one or more from the Line of Business options.

NOTE: It may be necessary to use the scroll bars on the right side of the browser to complete all information.
Contact Information

Step 6:
Complete all required fields on the Contact Information section

NOTE:
• Secondary email address is copied to any email notifications sent to the primary email address.

• If the billing and mailing addresses are the same, click the box and addresses will copy from Physical address. If different, enter each address separately.
License, Banking, and E&O Information

Step 7:
Complete all required fields in the License Information section.

Step 8:
Enter Banking information, add coverage amounts, and dates of coverage for Error & Omissions Declaration page.
License Information

RESULT:
A warning message pops up once the data in all fields has been entered. Please take the time to review your entries to ensure all data is correct. Make any necessary corrections, if needed, then Click OK.

Step 9:
Click the Next button.
Signing Documents

This section will walk you through the process of electronically signing required forms.
**Step 1:**
Click the *Review and Sign* button.

**NOTE:**
Clicking the Review and Sign button will automatically launch a DocuSign window to complete the W-9 Form electronically.
Step 2:
Check the box agreeing to use the e-signature screen and click the Continue button.
Step 3:
Click Start button and complete W-9 form.
Step 4:
If asked, accept e-signature style. Click the **Adopt and Sign** button.
W-9 Form

Step 5:

Once e-signature is applied, click the Finish button on the top of the form.
RESULT:
A confirmation appears when successfully signed. Choose to View the completed W-9 in PDF or click Close button.
Step 6:
Click the Next button to upload required documents (Health License and E&O Coverage certificate).

NOTE:
If needed, click Save and Resume Later button and progress is saved.
Step 7:
Click the *Upload Files* button to browse and locate files to upload.
Required Document Upload - License and E&O

Step 8:
Locate file and click Open.

NOTE: Files can also be dragged and dropped onto file loader from computer.

Step 9:
Click the Done button.

NOTE: Repeat steps 24-26 to upload the second document.
Step 10:
Verify documents are uploaded and click the Next button.
Broker Agreement

Step 11:
Next, e-sign the Producer Agreement. Click the Review and Sign button to begin.
Broker Agreement

Step 12:
To get started, click the Continue button.
Broker Agreement

Step 13:
Click the Sign button to apply e-signature.
Step 14:

Click the **Finish** button.
Broker Agreement

RESULT:

A confirmation appears when successfully signed. Choose to View the completed Producer Agreement in PDF or click Close button.
Step 15:
Click Next to review and submit the application.
Application Review

Step 16:

Use browser scroll bar and review application for accuracy.
Step 17:
If satisfied all information is accurate, click Submit button to Blue Shield’s Producer Appointment team for review and approval.
Application Status Review

In this section you will learn how view your submitted application to check the status.
Application Status Review

Click Resources and Be a Blue Shield of CA Broker to be taken to 'Important information' page.
Click *Check application status* button to view the status of the application.

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**Important information**

To continue improving the experience, our appointment platform will be undergoing a change on 05/18/2023. To avoid losing access to your appointment submission, please register for Broker Connection upon receiving your approval of appointment.

We are excited to have you start the journey towards being able to sell Blue Shield of California policies. To begin the two-step appointment process, you will need the following information:

- Tax ID number
- Email address
- Errors & Omissions (E&O) Insurance Certificate
- Direct deposit information

**Step 1: Register your account on Broker Connection**

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

**Step 2: Start application on Appointment Portal**

Click on 'Get appointed' after logging into Broker Connection to start the appointment process.

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

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**Help Resources**

- Frequently Asked Questions
- 2023 Appointments User Guide

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Application Status Review

Step 1:

Click View My Applications to view the status of the application.

Note:

Click Home to check for any open tasks.

Welcome Mike Ronny!

My Application

Submit Application

My Open Task

<table>
<thead>
<tr>
<th>Subject</th>
<th>Date</th>
<th>Detailed Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EBO Clarification</td>
<td>Mar 31, 2022</td>
<td><strong>We are unable to accept an EBO that has a DBA for the agency's name. Please provide a copy of the correct EBO declaration page.</strong></td>
</tr>
</tbody>
</table>
Application Status Review

Step 2:
Click Application Appointment Name hyperlink to view details of any application listed.

NOTE:
• Each application has a unique ID.
• Always check application status from View My Applications tab. All outstanding applications are found on this screen.
Step 3:

Review the application status.

Welcome Michael Ryan!

Contact Information

Physical Address
3021 Reynolds Ranch Parkway, Lodi, San Joaquin County, CA, 95240

Billing Address
3021 Reynolds Ranch Parkway, Lodi, San Joaquin County, CA, 95240

Mailing Address
3021 Reynolds Ranch Parkway, Lodi, CA, 95240
Broker Connection Access

You will get full access to Broker Connection when you are appointed and receive your Welcome email.
Blue Shield of California is an independent member of the Blue Shield Association