New Broker Appointment
2023
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 blueshieldca.com and click the Brokers link in the upper right-hand corner. Next, click Log in or Register. Then, click Get appointed with Blue Shield. Under the Start your application, click Broker Appointment Portal.

Get Appointed with Blue Shield of California

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

- Copies of your California Department of Insurance licenses
- Accident & Health agent and California Life Only
- Errors & Omissions (E&O) Insurance Certificate
- W-9 Tax Form
- Direct deposit information

Start your application

Once you've gathered the above documents, create an account with Blue Shield of CA Broker Appointment Portal. Once the appointment has been completed and approved you may register on the Broker Portal.

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.

Check your application status

You can check your status at any time by logging back into the Broker Appointment Portal.

Help Resources

Frequently Asked Questions
Creating an Account

**Step 2:**
- Complete the **required fields** in the broker form.
- Click the box to accept the **Terms of Use and Privacy Policy**
- Click **Sign Up**

**Step 3:**
Click the **Go to Login Page** button
Logging In

Step 4:
Enter your **username and password** from the email you received when setting up your account and click **Login**.

![Login Screen](image)

NOTE: The username format is the last name and email address used during registration. *Example: smithjohnsmith@email.com*

Step 5:
You are required to change your password. Enter your:
- **Username**
- **Current Password**
- **New Password**
- **New Password again**

Click **Submit**

![Change Password](image)
Logging In

**Step 6:**
You have successfully been registered! Click the *Go to Login* button.

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**Step 7:**
Enter the username and new password combination just established and click the *Login* button.
Start My Application

This section will walk you through completing a broker appointment application.
Step 8:
Once logged in, you will be taken to the landing page. Click **Required Documents** to view the document needed to complete your application.

Step 9:
Review and gather the necessary documents and click **Start my application**.
Producer Information

**Step 10:**

Complete all required fields in the *Producer Information* section.

**Step 11:**

Click the *Validate* button.

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**NOTE:** When manually adding address, the State field is a dropdown with all 50 states listed along with DC.
Step 12: 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 13:
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 14:
Complete all required fields in the License Information section.

Step 15:
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.

Warning:
Make sure you have entered all valid information before you move to next step. Inaccurate/incomplete information may result in appointment request to be denied.

Step 16:
Click the Next button.
Signing Documents

This section will walk you through the process of electronically signing required forms.

Begin
W-9 Form

Step 17:
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 18:
Check the box agreeing to use the e-signature screen and click the **Continue** button.
Step 19:
Click **Start** button and complete W-9 form.
Step 20:
If asked, accept e-signature style. Click the *Adopt and Sign* button.
W-9 Form

Step 21:

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 22:
Click the Next button to upload required documents (Health License and E&O Coverage certificate).
Step 23:
Click the **Upload Files** button to browse and locate files to upload.
Required Document Upload - License and E&O

**Step 24:**
Locate file and click Open.

**Step 25:**
Click the Done button.

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

**NOTE:** Repeat steps 24-26 to upload the second document.
Step 26:
Verify documents are uploaded and click the Next button.
Step 27:
Next, e-sign the Producer Agreement. Click the Review and Sign button to begin.
Producer Agreement

Step 28:
To get started, click the Continue button.
Step 29:

Click the *Sign* button to apply e-signature.
Step 30:
Click the Finish button.
RESULT:
A confirmation appears when successfully signed. Choose to View the completed Producer Agreement in PDF or click Close button.
Step 31:
Click Next to review and submit the application.
Step 32:
Use browser scroll bar and review application for accuracy.
Step 33:
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.
Step 34:
Click View My Applications.
Application Status Review

Step 35:
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 36:
Review the application status.

Welcome Michael Ryan!

- **First Name**: Alex
- **Middle Name**: 
- **Last Name**: Barry
- **Suffix**: 
- **Tax ID (SSN)**: 198783430

**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
Blue Shield of California is an independent member of the Blue Shield Association.