

Broker Certification Site



October 01, 2023 Y0118_23_672A_C 09222023 H2819_23_672A_C 09222023





What's Changing?

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Broker Certification Site Quick Reference Guide

Overview

- Agents must be certified each year to sell Blue Shield of California MAPD & PDP plans and be individually
 appointed by Blue Shield or endorsed by an Agency appointed by Blue Shield to receive renewal commissions.
 MAPD and PDP plan commissions are subject to the Centers for Medicare and Medicaid Services (CMS)
 guidelines, which are subject to change.
- The Blue Shield of California Plan Medicare Online Certification site makes it simple to register and take the certification. You are allowed 4 attempts to pass the assessment before you are locked out of the system.
- Agents must pass the Certification assessment.

What's Changing

AHIP

 Agents <u>must</u> be appointed or must be affiliated with an appointed agency in addition to completing the Certification.

Don't forget:

 You're required to pass both the AHIP Certification and Blue Shield's 2024 product-specific training to be ready to sell. Next

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What's Changing

- Moving the Certification Site to a new platform
 - Seamless transition from Broker Connection (same navigation)
 - Easy login via single sign-on (SSO) (no extra passwords or IDs to remember)
 - For non-appointed or non-endorsed brokers who are not registered with Broker Connection, there is a traditional ID & password fields.

AHIP

- New look of the Certification Site
 - Easy to navigate & use
 - Quick to access certification materials (exam, eCourse)





AHIP Completion

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AHIP

<u>Click here</u> to be taken to the AHIP Training Producers site.

Follow the steps below to complete your AHIP and Blue Shield Certifications:

AHIP

- 1. Pass the AHIP Annual Training.
- 2. Transmit your results to Blue Shield
 - Please note that the transmission from AHIP may take up to 24 hours for Blue Shield to receive.

-AHI	P	California Medicare Online Ce	ertification
Guiding Greater He	ealth	Thank you l	
MENU		Our records were updated with the AHIP certification and training information for the producer with the NPN:	
Overview: Medicare Program Bas	si	Login using the button below to access the Blue Shield 2023 & 2024 MAPD and PDP product training modules.	
Overview: Medicare Program I	Ba 🗸		
Navigation	~	Login	
Terms and Conditions	~	Blue Shield of California Home Privacy Terms of Use	
Learning Objectives	~	© Blue Shield of California 1999-2022. All rights reserved. Blue Shield of California is an independent member of the Blue Shield A	ssociation.
Training Roadmap			
Medicare Program Basics			
Medicare Basics	A	2023 - Final Exam	
Medicare Background	A		



Login to the Certification Site

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Login from Broker Connection Site

Step 01:

Navigate to the Broker Connection site and click Log In or Register





Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business. Our online appointment process now makes becoming a Blue Shield of California broker easier than

Join us and watch your business grow.



Step 02: Enter credentials and click Login

Note: You must login to access the Certification Site.

Welcome to Broker Connection

e to Broker Connect

Log in		Create
Q Username		Already app Broker Con
C> Password	Show (1)	Registe
Br Brenn my username		To register yo
		The tax ID
Login		Your Depa
		A National
Eorget, your password?		Who can create
Forgos your username?		Get appointed w
		① This page cannot a set of the set of th

an account

pointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner o



number for your brokerage or your personal tax ID number

artment of Insurance (DOI) license numbe Producer Number (NPN), if you have one

an account?

with Blue Shield

ot be bookmarked. See instructions for how to bookmark this page he

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Step 03:

Click the Medicare dropdown menu and select MA-PD/PDP Certification from the menu.



Step 04:

Login to the Blue Shield Broker Portal to begin the product certification by **clicking the link in Step 2**.

MA-PD and PDP certification

To sell Medicare Advantage Prescription Drug (MA.PD) and Prescription Drug (PDP) plans, agents need to complete their America's Health Insurance Plans (AHIP) certification. Insurers require AHIP certification to ensure that broker and agents are compliant with the Centers for Medicare & Medicaid Services (CMS) guidelines and regulations.

Per CMS guidelines, all independent agents who contact Medicare beneficiaries about MA-PD or PDP products must be trained and tested on Medicare compliance, specific health plan benefits and procedures, and CMS marketing requirements.

If you were certified last year, you must renew your certification again this year prior to January 1 of the new year in order to receive renewal commission on your active book of business. To sell Blue Shield MA-PD or PDP products, you must be AHIP-certified and Blue Shield product-certified. If you are not certified to sell Blue Shields MA-PD or PDP plans, we cannot, by law, pay you commissions on that business.

Steps to complete your annual AHIP and Blue Shield Product Certification

Step 1: Complete AHIP certification

```
1. Log in to the AHIP site through the Blue Shield of California link
```

```
    Complete all certification modules and quizzes. This will include a section on Fraud, Waste, and Abuse.
    After completing the quiz, transmit your results directly to Blue Shield by clicking the button at the bottom of the page
```

```
A you will receive an email from Blue Shield or Shield Learns with your account details and instructions on the Blue Shield product certification site
```

To receive a discounted rate of \$125, you must use our AHIP certification link as provided above. You must complete your AHIP certification and transmit your results to Blue Shield before moving on to Step 2.

Step 2: Complete Blue Shield Broker product certification

1. Access the Medicare Product Online Certification site using one of two options:

Blue Shield Broker

Log into the Blue Shield Broker portal using your Blue Shield Broker account. (If you don't have a Blue Shield Broker account, you can create one).

Shield Learns

If you are unable to obtain a Blue Shield Broker account, you can log in to the Shield Learns portal. Check your email for a message from Shield Learns for your account information. Your username is your National Producer Number (NPN). If you do not have a password, use the "Forgot your password?" option to create a new one.

2. Complete the MA-PD/PDP product certification. You'll have 4 attempts to pass. To pass, you'll need a score of 85% or higher.

Login into the Certification Site

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If you do NOT have a Broker Connection Account

AHIP

Step 05:

Click the link to login to the Shield Leans portal.

Shield Learns

If you are unable to obtain a Blue Shield Broker account, you can <u>log in to the Shield Learns portal</u>. Check your email for a message from Shield Learns for your account information. <u>Your username is your National Producer Number (NPN)</u>. If you do not have a password, use the "Forgot you password?" option to create a new one.

2. Complete the MA-PD/PDP product certification. You'll have 4 attempts to pass. To pass, you'll need a score of 85% or higher.

Questions about Blue Shield's plans

Contact your Broker Sales Manager with questions about our plans.

Step 06:

Use your National Producer Number (NPN) as the username and click the Forgot Password to create an account.

Please note this process may take up to 15 minutes for you to receive the reset email to complete the process.







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Updating your Agency Affiliation and/or Contact Information

Please complete the steps in this section if you are a:

- Newly appointed broker with Blue Shield of California.
- Returning broker and require profile updates
 - Last Name
 - Phone
 - Email
- Returning broker that has changed agencies.

Update Form

This is the profile update request form for the BSC Medicare Product Online Certification site.

If you are a brand new broker, please fill out what agency (or agencies) you are affiliated with, if applicable.

If you are a returning broker and require profile updates, please request by filling out the appropriate box. If you have changed agencies, please identify what agency you are changing from. If you do not need to make any updates for a particular field, you can leave it blank.

Changes may take 1-2 business days to be reflected in your account.

* Required

 Do you want to update your Agency Affiliation and/or Contact Information? If "No", you may exit this page.*

O Yes

O No

Submit

Never give out your password. Report abuse

Learning 👻

<u>Profile Updates</u>

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Check your Contact Information

- Step 01:
- Before begin the certification process, please verify your contact information by clicking on the Profile Icon at the top right of the screen.



tion Site <u>Profile Updates</u>

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Login from Broker Connection Site

AHIP

Step 02:

Also verify your agency affiliation and profile.

AGENCY AFFILIATION AND PROFILE UPDATE

Use the following form to:

- Update your agency affiliation (must be contracted with BSC)
- Update your contact information.

https://forms.office.com/r/jZiVjrT7Gz

How to verify your information:

To view your contact details

- · Click the portrait button in the top right
- Click the portrait button again that appears

To view your primary Agency (Organization):

Check History and Certification

Step 03:

Click the image to access the history and certification screen which contains your affiliation.



AGENCY AFFILIATION AND PROFILE UPDATE

Use the following form to:

- Update your agency affiliation (must be contracted with BSC)
- Update your contact information.

https://forms.office.com/r/jZiVjrT7Gz

How to verify your information:

To view your contact details

Click the portrait button in the top right
Click the portrait button again that appears

To view your primary Agency (Organization):

Check History and Certification

User number:

Primary organization: Insurance Services LLC

Manager:

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Step 04:

Your primary organization is shown on the right side of the Training Transcript section of the screen.

TRAINING TRANSCRIPT Select a year or date range to filter completed training records. Date Range ~ Start Date End Date 9/18/2022 03:26pm 9/18/2023 03:26pm **** REFRESH List of completed activities from 9/18/2022 to 9/18/2023 Username: 1712 E-mail: Primary job: ACTIVITIES 6



Step 05:

👌 Shie	old Legins self - myteam - administration -		Learning • Search		۹ 🛛 🥥
2	TRAINING TRANSCRIPT				PRINT EXPORT TO PDF
Le Training ranscript	Select a year or date range to filter completed training records. Date Range Stant Date End Date SJ02022 05:03pm SJ0202 05:05 S				View: Standard v
	List of completed activities from 3/30/2022 to 3/30/2023 Username:		User number:		
	E-mail:		Manager:		
	Primary job:		Primary organization:		
	ACTIVITIES				
	Activity -	Start Date	Completion Date	Completion Status Score	
	Curriculum: Broker Agreements TEST	3/30/2023	3/30/2023	Attended 100	

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Step 06:

To update your agency affiliation and profile information, **click the form link**.

AGENCY AFFILIATION AND PROFILE UPDATE

Use the following form to:

- Update your agency affiliation (must be contracted with BSC)
- Update your contact information.

https://forms.office.com/r/jZiVjrT7Gz

How to verify your information:

To view your contact details

- Click the portrait button in the top right
- Click the portrait button again that appears

To view your primary Agency (Organization):

Check History and Certification

Step 07:

Complete the form.

Update Form

This is the profile update request form for the BSC Medicare Product Online Certification site.

If you are a brand new broker, please fill out what agency (or agencies) you are affiliated with, if applicable.

If you are a returning broker and require profile updates, please request by filling out the appropriate box. If you have changed agencies, please identify what agency you are changing from. If you do not need to make any updates for a particular field, you can leave it blank.

Changes may take 1-2 business days to be reflected in your account.

* Required

1. Do you want to update your Agency Affiliation and/or Contact Information? If "No", you may exit this page. *

O Yes

O No

Submit

Never give out your password. Report abuse



Certification Site Navigation

- □ Agreements
- □ Training Course
- Certification Exam
- □ Certification History

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ation Site Profile Updates

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Agreements

Step 01:

Register for Step 1: Agreements.

Medicare Product Online Ce	rtification	
WELCOME!		
Thank you for your interest in selling Blue Shield	of California's MAPD and/or PDP plans!	
Before getting started, you must have already	completed the AHIP Medicare Compliance	e certification.
If you're ready, please continue through the step	os below.	
STEP 1: AGREEMENTS Please read through the amendment		Accessibility Statement for Individuals with Disabilities
document and complete the questionnaire that follows. This is a pre-requisite for access to the		At Blue shield of California, we are committed to ensuring our applications are accessible to individuals with disabilities.
certification exam.		If you need assistance using our certification application, we can help you
	CURRICULUM < ♡	Please email us
. Inc.	Broker Agreements TEST	at producer.services@blueshieldca.com call us toll-free at 800-559-5905 / TTY: 71
W		

NOTE: You are required to agree to the Medicare Amendment before completing the Medicare Certification.

Step 02:

Add Amendment to the Producer Agreement (Medicare).



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Agreements

Step 03:

Add Broker Agreement Attestation.

Note: 2022 Amendment is for Certification year 2024 require



Step 04: Click the Register button.



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Step 05:

Start the Amendment to the Producer Agreement (Medicare).



Step 06:

Review the Amendment and close the window when done.



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Agreements

Step 07:

Select Yes to indicate that you have finished reviewing the document.



Step 08:

Start the Broker Agreement Attestation.

MY TEAM Y ADMINISTRATION Y		Learning + Search
	CURRICULUM	RESUME ACTIVITY
	V S Y 100-300	Completion Status 50%
Broker Agreements TEST	DETAILS ACTIVITIES	
1. 2022 Amendment to the Producer A 2. Broker Agreement Quiz		DOCUMENT : 2022 Amendment to the Producer Agreement (Medicare) ATTENDED C) Attempt history C) <
	ľ	QUICK ASSESSMENT E Broker Agreement Quiz REGISTERED





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Training Course

Step 12:

Register for Step 2: Training Curriculum.

Training

Thank you for your interest in selling Blue Shield of California's MAPD and/or PDP plans! Before getting started, **you must have already completed the AHIP Medicare Compliance certification**. If you're ready, please continue through the steps below.

STEP 1: AGREEMENTS

WELCOME!

Please read through the amendment document and complete the questionnaire that follows.

This is a pre-requisite for access to the certification exam.



Accessibility Statement for Individuals with Disabilities At Blue Shield of California, we are committed to ensuring our applications are accessible to individuals with disabilities.

If you need assistance using our certification application, we can help you.

Please email us at producer.services@blueshieldca.com or call us toll-free at 800-559-5905 / TTY: 711.

Step 13:

Add Activities – either or both the eCourse or Course PDF.

ACTIVITY REGISTRATION



There are two methods available for accessing the training course: interactive e-Course and PDF. The PDF option will allow to view and save a copy of the training course slides. Add the viewing option you prefer and register to start.

	↓ ACTIVITIES (2): Recommended: Select 2 activity(s) ↓	
COURSE EEGISTEATION ALLOWED 2023 Annual Medicare Certification	🍯 Unlimited	
DOCUMENT REGISTRATION ALLOWED 2023 Annual Medicare Certification - PDF Course III 2023 MAPD Course PDF	📽 Unlimited	ADD

STEP 2: TRAINING COURSE

This training presentation will help you understand the basics of Medicare Advantage Prescription Drug (MAPD) plans, Prescription Drug Plans (PDP), and Medicare Supplement plans offered by Blue Shield of California for Cycle Year 2023.

This course is optional, but highly encouraged if you are unfamiliar with our Medicare products.



COURSE 2023 Annual Medicare Certification

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REGISTER



on Site Profile Updates

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Training Course

Step 16:

Click the Next button when you are done reviewing the course description.



NOTE: If you chose the PDF course option, at this step, the document would open.

Step 17:

Click the begin course button.



NOTE: If you chose the PDF course option, at this step, review the document and close the window when you are finished.

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Training Course

Step 18:

Exit the Course window when you are done.



NOTE: If you chose the PDF course option, at this step, you would select **Yes** to indicate that you have finished reviewing the document.

Step 19:

Return to Home Screen.



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Certification Exam

Step 20:

Register for Certification Exam.



Step 21: Click the Register button.



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ation Site <u>Profile Updates</u>

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Certification Exam

Step 22:

Start the exam.



Step 23:

Click the Next button when you are done answering each question.

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Certification Exam

Step 24:

Click the Question button to review or edit an answer before submitting the exam.



DEMO MAPD 2023	QUESTIONS	DEMO MAPD 2023
QUESTION 20 OF 20 🏠	an hours of operation.	ALL MARKED QUESTIONS UNANSWERED QUESTIONS
True		1. What is Blue Shield of California's Mission?
○ False		2. All Blue Shield Medicare Advantage Prescription Drug (MAPD) plans with the SSBCI Independence and Safe Mobility with AAA benefit include:
		3. Medicare marketing material must have:
		4. For 2023, routine dental services are covered in selected plans.
		5. An example of a grievance is expressing dissatisfaction with:
		6. The Blue Shield Balance (HMO) plan is available in all southern California counties.
	CLOSE PREVIOUS CLEAR SELECTION SUBMIT ASSESSMENT NEXT	

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Certification Exam

Step 26:

Review the results and click the Close button.

DEMO MAPD 2023		×
ASSESSMENT RESULTS		
	Correct 60.00% (12)	
	incorrect 40.00% (8)	
	Not attempted 0.00% (0)	
TIME TAKEN 1 Minute(s) 55 Second(s)		Ь
		CLOSE ASSESSMENT REVIEW

Step 27: Return to Home Screen.

Please note that you will not receive an email confirming that you have passed and completed the certification.

Please use the Certification History feature to view and print your certificate in the next section of this document.

🔗 Shi	eld Learns				
			QUICK ASSESSMENT DEMO MAPD 2023 ATTENDED-FAILED		:
			♡ < ₱ 0-200	Completion Status 100% REGI	TER AGAIN
		Attempt History Attempts Remaining: 3			
		Demo MAPD 2023	DETAILS ACTIVITIES SIMILAR ACTIVITIES		
			Additional Information		
			Below are the additional details about this activity su	ch as facility, location and so on.	
			Training organization: BSC Brokers		
			Owner: Technical Support		
			 Prerequisites 		



Access Certification History

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tion Site Profile Updates

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Certification History

Step 01:

After logging into the BSC Medicare Product Online Certification site, access the History and Certification page on the right side by **clicking on the image**.



Step 02:

In the Certification History, you will be able to view your previously completed courses and certification exams.

TDAINI	NG TRANSCRIPT				PRINT][EXPORT TO PDF
IKAINI	ING TRANSCRIPT						
Select a yea	ar or date range to filter completed training records.						
Date Rang	ge 🗸						
Start Date	End Date						
4/15/2022 0							
LEARNER	R TWO						
List of comp Username: learner2	leted activities from 4/13/2022 to 4/13/2023		User number: learner2				
E-mail:			Manager:				
Primary job	2:		Primary organization:				
ACTIVITIES	S						
	Activity -	Start Date	Co	ompletion Date Co	ompletion Status	;	Score
	Curriculum: Medicare Product Training	4/5/2023	4/	5/2023 At	tended		
Cgl	Quick Assessment: MAPD 2023	4/6/2023	4/	6/2023 At	tended		95
	Curriculum: Broker Agreements	4/12/2023	4/	12/2023 At	tended		100
	Course: AHIP 2023	4/5/2023	4/	5/2023 At	tended		100

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Step 03:

By default, the transcript will show one year's worth of activities. You can **use the "Date Range" drop down to select previous years or view your entire history**.

	PRINT	EXPORT TO PDF
Select a year or date range to filter completed training records.		
Start Da e End Date 4/13/2 4:55pm Image: Array 12:55pm		

Step 04:

The **"Export to PDF" button** will enable you to save a copy of your transcript to your computer.

Select a year or date range to filter completed training records. Date Range ~ Start Date 4/13/2022 04:55pm



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Step 05:

Review the results.

ACTIVITIES

	Activity 🗸		Start Date		Completion Date	Completion Status	Score
	Curriculum: Medicare Product Tr	raining	4/5/2023		4/5/2023	Attended	
C)	Quick Assessment: MAPD 2023		4/6/2023		4/6/2023	Attended	95
	Curriculum: Broker Agreements		4/12/2023		4/12/2023	Attended	100
	Course: AHIP 2023		4/5/2023		4/5/2023	Attended	100
	-	Completion St	tatus	Score			
	-	Attended					
	Attended Attended			95			
				100			
		Attended		100			

Step 06:

The small, blue image to the left of the MAPD activity is a link to your Certification of Completion.

Click the image to open a new window with your certificate of completion.

ACTIVITIES

	Activity 🗸		Start Date	Completion Date	Completion Status	Score
	Curriculum: Medicare Product Training		4/5/2023	4/5/2023	Attended	
ت ا	Quick Assessment: MAPD 2023		4/6/2023	4/6/2023	Attended	95
	Curriculum: Broker Agreements		4/12/2023	4/12/2023	Attended	100
	Course: AHIP 2023		4/5/2023	4/5/2023	Attended	100
		ACTIVITIES				
			Activity 🗸			
			Curriculum: Medicare Product Training			
	🗔 🔤 Quick Assessment: MAPD 2023					
	Curriculum: Broker Agreements					
	Course: AHIP 2023					

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Step 07:

Click the "Export to PDF" button to generate a PDF version of the certificate. You can then save the PDF and/or print the certificate for your records.



Step 08:

Return to Home Screen.





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How to get help



Email: 2 Producer.Services@blue shieldca.com



Connect with your **Broker Manager**

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Resources

- Blue Shield Certification Information: Information Page
- National Insurance Producer Registry: <u>https://pdb.nipr.com/html/PacNpnSearch.html</u>
- AHIP Training Producers Site: <u>http://www.ahipmedicaretraining.com/clients/blueshieldca</u>
- Broker Connection Site: Broker Certification Producer Connection (blueshieldca.com)