Broker Certification Site

October 01, 2023

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What’s Changing?

View
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.

• Agents **must** 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.
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.

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

View
Click here to be taken to the AHIP Training Producers site.

Follow the steps below to complete your AHIP and Blue Shield Certifications:
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.
Login to the Certification Site

View
Login from Broker Connection Site

Step 01:
Navigate to the Broker Connection site and click Log In or Register

Step 02:
Enter credentials and click Login

Note: You must login to access the Certification Site.
Login from Broker Connection Site

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.

By 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 requalification 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 or sell Blue Shield's 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
2. Complete all certification modules and quizzes. This will include a section on Fraud, Waste, and Abuse
3. After completing the steps, submit your results securely to Blue Shield by clicking the button at the bottom of the page

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.

2. Complete the MA-PD/PDP product certification. You’ll have 4 attempts to pass. To pass, you’ll need a score of 66% or higher.
If you do NOT have a Broker Connection Account

Step 05:
Click the link to login to the Shield Learns portal.

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.
Profile Updates

View
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.
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.
Login from Broker Connection Site

Step 02:
Also verify your agency affiliation and profile.

Step 03:
Click the image to access the history and certification screen which contains your affiliation.
Login from Broker Connection Site

Step 04:
Your primary organization is shown on the right side of the Training Transcript section of the screen.

Step 05:
Click the Home icon to exit this screen.
Login from Broker Connection Site

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/jZlVjrT7Gz

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.
Certification Site Navigation

- Agreements
- Training Course
- Certification Exam
- Certification History

View
Agreements

Step 01:
Register for Step 1: Agreements.

Step 02:
Add Amendment to the Producer Agreement (Medicare).

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

Step 03:
Add Broker Agreement Attestation.

Note: 2022 Amendment is for Certification year 2024 require

Step 04:
Click the Register button.
Agreements

Step 05:
Start the Amendment to the Producer Agreement (Medicare).

Step 06:
Review the Amendment and close the window when done.
Agreements

Step 07:
Select Yes to indicate that you have finished reviewing the document.

Step 08:
Start the Broker Agreement Attestation.
Step 09:
Agree to the Producer Agreement.

Step 10:
Agree to not release any product information prior to start of cycle year Annual Enrollment Period (AEP) and click Submit Assessment.
Agreements

Step 11:
Return to Home Screen.
Training Course

Step 12:
Register for Step 2: Training Curriculum.

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 certification.
If you’re ready, please continue through the steps below.

STEP 1: AGREEMENTS
Please read through the amendment document and complete the questionnaire that follows.
This is a prerequisite for access to the certification exam.

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.

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 800-359-5905 / TTY: 711.

Step 13:
Add Activities – either or both the eCourse or Course PDF.
Training Course

Step 14:
Click the Register button.

Step 15:
Start the activity(s).
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.
Training Course

Step 18:
Exit the Course window when you are done.

Step 19:
Return to Home Screen.

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

Step 20:
Register for Certification Exam.

STEP 2: TRAINING COURSE
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STEP 3: CERTIFICATION EXAM
Plan year certification requires a single test which covers all Medicare products.

If you do not see a link to the certification exam, please ensure you have passed and submitted your results for the appropriate AHIP and completed the agreement questionnaire from Step 1.

Step 21:
Click the Register button.
Certification Exam

Step 22:
Start the exam.

Step 23:
Click the Next button when you are done answering each question.
Certification Exam

Step 24:
Click the Question button to review or edit an answer before submitting the exam.

Step 25:
Submit Assessment when you are done.
Certification Exam

Step 26:
Review the results and click the Close button.

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.
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.
Certification History

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.

Step 04:
The “Export to PDF” button will enable you to save a copy of your transcript to your computer.
Certification History

Step 05:
Review the results.

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.
Certification History

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.
Who to Contact
How to get help

1. Call Producer Services:
   1-800-559-5905
   TTY 711

2. Email:
   Producer.Services@blueshieldca.com

3. Connect with your Broker Manager
Resources

- Blue Shield Certification Information: Information Page


- AHIP Training Producers Site: http://www.ahipmedicaretraining.com/clients/blueshieldca

- Broker Connection Site: Broker Certification - Producer Connection (blueshieldca.com)