Welcome to Broker Connection

Access commissions, client lists, and more in one convenient place with Broker Connection.

Your Broker Connection account provides access to:

- **Application Status**
  Check updates on client applications with more status detail.

- **Late & cancellation notifications**
  At a glance, see who’s late and if their policy is canceled. Send reminders to your clients with a click.

- **Email ID card links**
  Get clients using their coverage right away by emailing a link to their member ID card.

- **Commissions quick links**
  Access your latest commissions statement from the homepage after logging in.
## Account Profile Descriptions

### Account Profiles

<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.

---

There are 5 types of profiles for Broker Connect accounts.

By default, if you are an appointed Blue Shield broker that is registering for an account for the first time and is not affiliated with an agency, your account profile is automatically set to the highest profile — "Primary Agent role".

Agency Owners and Primary Agents can invite brokers to create an account that is affiliated with their agency and assign a specific role for that individual.

**Note:**

If you are not appointed with Blue Shield of California, you must be associated with an agency (Primary Agent) who is appointed with Blue Shield to create a Broker Connection account.
Using this Quick Reference Guide

This guide is written for all audiences and some section may not apply to you. Please refer to the recommended guidance pathways for using this quick reference guide.

Section to View

For Agent Use Only. Plans contain exclusions and limitations. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.
Broker Connection Benefits

Your Broker Connection account provides many essential benefits including:

- **Single location to access sales collateral**
  Quickly and easily access commonly used sales materials including Benefit Highlight brochures, marketing brochures, and much more.

- **Manage your book of business**
  A single location to compare plans and enroll clients, view application status and client list, and access commission statements.

- **Get the latest Blue Shield Marketing Newsletters and Mandates Information**
  Find details and resources on mandates impacting your clients and important updates from Blue Shield.
Broker Connection Registration Experience

Blue Shield of California
Registration Options

Option 1:
Apply for appointment and register.
To become a Blue Shield Broker, you must first create an account and have your account appointed.

Option 2: Create an Account
Anyone can create a Broker Connection account. However, your account must be appointed to gain full access to all of our products.

Non-appointed broker
If you're not appointed with Blue Shield but work for a broker who is, ask that broker to create a Broker Connection account for you.
Broker Connection Registration Experience

Option 1: Apply for Appointment

1. Navigate to the Broker Connect homepage and click the Get Appointed button.

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.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our two-step appointment process on our resources page.

Join us and watch your business grow.

Get the most from your Broker Connection account
Broker Connection Registration Experience

Option 1: Apply for Appointment

Step 1: Start application on Appointment Portal

Click on ‘Get appointed’ to start the appointment process.

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

Step 2: Register your account on Broker Connection

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

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

Note:

Agents already appointed with Blue Shield of California will be able to create an account on Broker Connection with access to all its tools and resources.

It takes about 5 minutes and 6 quick steps to register as an agency principal/broker on Broker Connection.

Important:

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.
Welcome to Broker Connection Registration Experience

Option 2: Register and Log In

1. Click the Register Now link to register.

Registration Steps

1. Click the Register Now link to register.

Note:

To register for a Broker Connection account, you must be appointed with Blue Shield.

For endorsed agents working under an agency, please contact your Primary Agent for invite to register.
Register for Broker Connection

Important:
Regardless of the option you have chosen, you will follow the same 6 steps.

2. Select the lines of business that you sell.
At minimum, you'll need to select one, and you can select multiple lines, if you sell different lines of business.

3. Click the Continue button to move to the next step.
Register for Broker Connection

4. Select "Get appointed with Blue Shield of California" option.

If you are already appointed, deselect the checkbox to continue.

5. Complete the Tax and License information. Required fields are marked with an asterisk (*).

6. Click the Continue button to move to the next step.

Note:
As a security feature, the system will validate the information with our systems.
If the information does not match what we have on file, you will not be able to proceed.
Register for Broker Connection

7. Complete the Contact information. Required fields are marked with an asterisk (*).

8. Click the Continue button to move to the next step.
Register for Broker Connection

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

9. For the question, select a response.
10. Click the Continue button to move to the next step.
Register for Broker Connection

11. Create a username and password.

- Guidance is provided below the field to ensure that you have a unique and secure ID and password.

12. Click the Continue button to move to the next step.

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Register for Broker Connection

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@blueshieldco.com

Account setup
Username: 4BobSmlth

Lines of business
Lines of business: Individual & family plans

13. Click the Continue button to move to the next step.
Register for Broker Connection

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).
Register for Broker Connection

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

15. To complete your registration, click the **Continue** button.
Register for Broker Connection

Check your inbox for an email, requesting confirmation of your email address.

If you haven’t received your email confirmation within a few minutes, you can click the link to send another verification.

16. Click the Close button.

If you haven’t received your email confirmation, you can send another one.
Register for Broker Connection

Activate your Broker Connection account

Thank you for registering with Broker Connection

First Name: Bob
Last Name: Smith
Agency: 
User name: 4BobSmith

Once you verify your email address, you can log in with your user name and password. This link will expire in 24 hours after you signed the Terms and Conditions.

Verify Email

Follow Blue Shield

17. To complete the account creation process, click the Verification button.
Register for Broker Connection

After verifying your email address, you will see a confirmation screen indicating that you have successfully created an account.

18. To access your new Broker Connection account, click the Log in button.
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Broker Connection

Welcome to Broker Connection

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.

19. On the left side of the screen; enter your username and password.

20. Click the log in button.

Important

Your login information will remain the same as you complete the application process and become appointed with Blue Shield.
Register for Broker Connection

If you log in for the first time and have not verified your email address, you will receive a reminder.

Verify new email address

Check your inbox (or spam) for an email from us. Follow the instructions to verify this new email address so that you can access your account.

N/A

Resend email

Cancel OK
You are now logged into Broker Connection. From the home page you can use the navigation tools to access various sections to help manage your book of business including:

- **App Status**
- **Online Client List**
- **Shield on Demand**
- **Commission Statements**
2- Step Verification
2-Step Verification

Overview

Blue Shield of California is proactively enhancing data security by implementing 2-Step Verification for all external portals. This is additional layer of protection requires users to verify their identity through a personalized code, reducing unauthorized access and potential data breaches. The move aligns with Security Compliance requirements, offering more secure online interactions and better safeguarding sensitive information against compromised passwords.

Important

2-Step Verification is unique to the individual. Each person within your organization, agency, or company who needs access must register for an account on Broker or Employer Connection.

Key Points

1. You cannot bypass the 2-Step Verification.
2. You’ll need real-time access to the email inbox of the email address on file in your online profile.
3. You must enter a new 6-digit code each time you login or after an extended period (4 hours) of inactivity.
4. The 2-Step Verification code is sent to the registered email in your online Broker Portal profile.
5. If you enter an incorrect code three times, your account will be automatically locked for 10 minutes. You can attempt your login after the 10-minute wait period.

Any issues with the 2-Step Verification, please contact Blue Shield Producer Services.

Phone Number:
1-800-559-5905
Completing a 2-Step Verification

1. Enter your Username and Password information and click the Login button.
Completing a 2-Step Verification

A one-time passcode is sent to your email address.
You have 10 minutes to enter that code before it expires.
If you need to have the code sent again, click the Resend Code link at the bottom of the page.

2. Enter the code and click Confirm.
Completing a 2-Step Verification

1. After success message is displayed, you are automatically taken to the Broker Connection home page.

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Primary Agents & Agency Owners
Account Management Tool
Introducing Broker Connection Account Management Tool

Primary agents and agency owners will have administrative control for their account access to Broker Connection using the new “Account Management Tool” features.

Primary agents already appointed with Blue Shield of California will be able to create and manage new user accounts on broker connection with access to all its tools and resources.
Register and Log In

1. Click the Log in or Register button at the top right of the page.
Register and Log In

Welcome to Broker Connection

Log in

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?

Got appointed with Blue Shield

Note:
This section provides steps for the Primary Agent to perform a secondary registration process for endorsed agents for their agency.
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.

**Resources Menu**
Under the resources tab you’ll see a new option for manage your accounts.

3. Click the Resources Tab to view the menu.
4. Select Manage your accounts from the menu options.

**Note:**
You must sign-in to your Primary Agent or Administrator account to access this menu option.

Other role-based profiles (i.e., sales agent, sub agent) will not display this option in the menu.
Account Management

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>Mitchell J</td>
<td>Administrator</td>
<td><a href="mailto:mitchellj@email.com">mitchellj@email.com</a></td>
<td>Medicare Small Groups Large Groups</td>
<td>2022-03-25</td>
<td>Present inside</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>525</td>
<td>0</td>
<td>NA</td>
<td>Active</td>
</tr>
</tbody>
</table>

Registration Steps

The Broker Connection Accounts page displays all the accounts for your agency.

5. At the top of the page, is the Pending Accounts section, which are accounts that were newly invited to register.

6. And at the bottom of the page, there the active and deactivated accounts.
Managing 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>Mitchell J</td>
<td>Administrator</td>
<td><a href="mailto:mitchellj@email.com">mitchellj@email.com</a></td>
<td>Medicare Small Groups Large Groups</td>
<td>2022-03-23</td>
<td>Request/Remove</td>
</tr>
<tr>
<td>Bob Smith</td>
<td>Sales agent</td>
<td><a href="mailto:bobsmith@email.com">bobsmith@email.com</a></td>
<td>Medicare</td>
<td>2022-04-04</td>
<td>Request/Remove</td>
</tr>
</tbody>
</table>

Active and deactivated accounts

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Tax ID</th>
<th>DOE License</th>
<th>NPI</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger Davis</td>
<td>Subagent</td>
<td>N24</td>
<td>0</td>
<td>N/A</td>
<td>Active</td>
</tr>
</tbody>
</table>
### Managing Accounts: Pending 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>Mitchell J</td>
<td>Administrator</td>
<td>mitchell.joemail.com</td>
<td>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>529604528</td>
<td>0718744</td>
<td>NA</td>
<td>Deactivated</td>
</tr>
</tbody>
</table>

Pending Accounts are technically not active.

Therefore, the only field that's editable is the email address field. You can update the email and resend the invite.

You also have the option to delete the pending account by click on the trash icon.

**Note:**

If the user did not respond within the first seven days, you can resend the invite.

Resending the invite will provide another seven days before it expires again.
Managing Accounts: Active and Deactivated Accounts

Once the user accepts the invite and creates the account, it will move to Active accounts section.

You can expand each user’s information by clicking on the expand arrow on the right side of their information.

The expanded information now includes the ability to:

- Change the user’s role, and if you selected sub-agent, you could turn on or off access to the agency’s client list, and commissions.
- Add and remove, the lines of business the person sells.
- Account controls to "dis-associate" the user from the agency.
Creating an Account

MANAGE BROKER CONNECTION ACCOUNTS

Pending accounts

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
<th>LOB/Segment</th>
<th>Expires</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mitchell J.</td>
<td>Administrator</td>
<td><a href="mailto:mitchell.jones@ssl.com">mitchell.jones@ssl.com</a></td>
<td>grp Medicare / Senior /Large Groups</td>
<td>2022-03-25</td>
<td>Request Info</td>
</tr>
</tbody>
</table>

Active and deactivated accounts

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Tax ID</th>
<th>DOL License</th>
<th>NPI</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roger Q.</td>
<td>Subagent</td>
<td>E25</td>
<td>0</td>
<td>NA</td>
<td>Active</td>
</tr>
</tbody>
</table>
Create an Account

MANAGE BROKER CONNECTION ACCOUNTS

1. Click the Create an Account button to invite the user to register for a Broker Connection account associated with your agency.

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</td>
<td>Primary agent</td>
<td><a href="mailto:93@email.com">93@email.com</a></td>
<td>IPF, Medicare</td>
<td>2022-03-22</td>
<td>Respond invite</td>
</tr>
</tbody>
</table>

Active and deactivated accounts

No accounts.
Create an Account

The primary agent begins a four-step process, and at the top of the page is a progress bar.

2. For the first step, assign a role.

3. If Subagent is selected, you can select optional permissions to:
   - Access agency client list.
   - View agency commissions.

4. Scroll to the bottom of the page and click Continue to move to the next step.

Note:
Subagent is the only role that has optional permissions.
### Roles Defined

Each of the different roles are clearly defined.

There can be up to four primary agents that are assigned per agent.

There are no restrictions in terms of how many administrators, subagents, sales agents, or support staff that can be created.

For the Medicare lines of business, endorsed agents will be fulfilled with the sales agent role.

Subagents technically are applicable for all lines of business.

However, endorsed agents are not appointed with blue shield, and we are requiring users who are set up as a subagent to be appointed with blue shield directly.

<table>
<thead>
<tr>
<th>Role</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>
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<tr>
<td>View their commissions</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
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<td></td>
<td></td>
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<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>

*Optional

*Primary agents can create up to 4 other primary agent accounts.*
Create an Account

5. Select the lines of business that the user will sell.

6. Click the Continue button to move to the next step.

Note:
At least one option must be selected, and you can select as many as you need.
Create an Account

For personal information, we enter only the essential data that's required to trigger the invitation.

7. Enter the personal details to create the account and send the invite and click Continue.
Create an Account

You will get a confirmation stating that an account for a specific individual and specific role was created.

8. Click the Return to Dashboard to exit this screen.
Accepting an Invitation & Merging Accounts

Blue California
Broker Connection

Rohit S 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

Facebook • Twitter • Instagram
Broker Connection registration experience for agents associated with an agency

Agents that are currently not appointed with Blue Shield of California, will be able to create an account on Broker Connection through an invite registration process from their agency. Additionally, agents that have Broker Connection accounts or are appointed with Blue Shield can accept an invite to register an account that is associated with an agency.

These types of user accounts are assigned role-based permissions and functionality, as determined by the primary agent or agency and will provide access to tools and resources to help agents sell and help manage their book of business.
Accepting an invitation and merging accounts

Rohit S created a Broker Connection account as Sales agent for you.

This invitation will expire in 7 days.

To accept the invite, click the Activate Account button in the invite email.

The invite expires in 7 days.

If the invite has expired, please contact the sender to create a new invite.

Note: You’ll need the last 4 digits of the agency’s tax ID number to activate your account.

Follow Blue Shield

Note: You will need the last 4 digits of the agency’s tax ID number to activate your account.
Register for Broker Connection

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California.

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.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our two-step appointment process on our resources page.

Join us and watch your business grow.

After clicking on the Activate Account button in the email, you will be taken to the Broker Connection home page.

2. Click the Log In or Register button.
Register for Broker Connection

Log in

- Username
- Password
- Remember my username

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.

1. **Register** button

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

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Register for Broker Connection

We see again the six-step process in the non-affiliated agent registration.

4. Enter last 4 digits of agency TIN to validate and get started with secondary registration.
Register for Broker Connection

After entering the Tax Information Number, you will receive a pop-up asking if you have an account.

5. Select a response to the account question (default pop-up).

If you select no, it will follow the same registration process as we demonstrated in the first part of the guide.
Register for Broker Connection

If you select Yes, you have a Broker Connection account:

6. Confirm your account information, the system recognizes existing account and click Continue.
Register for Broker Connection

Log in to merge your accounts

7. Log in using your current ID and password to merge your accounts.

Forgot your password?
Forgot your username?
Register for Broker Connection

Your Broker Connection accounts have been successfully merged.

To make changes to your new Broker Connection account, go to your Profile page.

Log in

Follow Blue Shield

Facebook | Twitter | Instagram

Registration Steps

After you log in, you will receive an email confirming that your account has been merged.

8. Click the Log in button in the email to return to Broker Connection.
Register for Broker Connection

On your next log in, you will see an option to select the company.

9. When you select the company, you will have access to the role assigned to you.

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Updating Your Broker Profile

Broker Connection Site
Updating Your Broker Profile

Welcome to Broker Connection

Log in

1. Enter your credentials and click the Log In button.

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
Updating Your Broker Profile

2. Click the profile icon (your name) at the top right of the page to access your profile information.
Updating Your Broker Profile

3. To update your profile information, click the **Edit** icon in the section you want to update.
Updating Your Broker Profile

MY PROFILE

User account

First name
Valid

Last name
Producer

Email
producerconnection@blueshieldca.com

Username
Must have:
- 5-20 characters
- Numbers and letters only
- No spaces
- Unique identification

Password
Must have:
- 5-20 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- A number or symbol ("!")
- No spaces

New password
Show

Confirm new password
Show

Save Changes

4. When you are done editing your profile, click the Save Changes button.

Remember
It's important to keep your information up-to-date.
Application Status
Check updates on client applications

View Section
Application Status

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.
Check status >

Online client list
At a glance, see who's late, send reminders, email your clients ID card links, and quickly do business.
Manage your client list >

Rewards & commissions
See our competitive broker commissions and special bonus programs.
View commission updates >

Small business renewal center
Your single source for renewals, quotes, and maintenance.
Visit the center >
## Medicare plan application status

<table>
<thead>
<tr>
<th>Name</th>
<th>Application status</th>
<th>Plan name</th>
<th>Confirmation number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve</td>
<td>Approved</td>
<td>Medicare Supplement Plan A</td>
<td>SCOP21012</td>
</tr>
<tr>
<td>Venus</td>
<td>Received</td>
<td>Medicare Supplement Plan A</td>
<td>SCOP21012</td>
</tr>
<tr>
<td>RASHID</td>
<td>Action Required - On Hold Due to Missing Info</td>
<td>Medicare Supplement Plan A</td>
<td>DRX009072</td>
</tr>
<tr>
<td>BRIAN</td>
<td>Processing</td>
<td>Medicare Supplement Plan A</td>
<td>DRX009072</td>
</tr>
</tbody>
</table>

2. Click the **Filter and Sort** link to expand or close the search options.
To perform a search, enter at least one criteria in its corresponding field.

Use the filters (highlighted in yellow) to narrow your search by application submitted:

- Within the last 6 months
- Within the last 24 hours
- Within the last 48 hours
- Within the last week
- Within the last month
- Other

You can sort the results by:

- Latest application
- Last Name

3. Click the Submit button to execute the search.
Medicare plan application status

IFP Off Exchange | IFP On Exchange | Medicare

Filter and Sort

The search results are returned and sorted in the order you selected. Each result displays the applicant's:

- Name
- Application status
- Plan name
- Confirmation number

4. To view details, click the Expand arrow.

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### Medicare plan application status

<table>
<thead>
<tr>
<th>Name</th>
<th>Application status</th>
<th>Plan name</th>
<th>Confirmation number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venus</td>
<td>Received</td>
<td>Medicare Supplement Plan A</td>
<td>SCOP210121</td>
</tr>
<tr>
<td>RASHID</td>
<td>Action Required - On Hold</td>
<td>Medicare Supplement Plan A</td>
<td>DRX0009072</td>
</tr>
</tbody>
</table>

Additional details are shown including:
- Application submitted date
- Medicare ID
- Subscriber ID
- Email address
- Producer of record

**Note – Hover Text**

If you hover your mouse over the **Application status**, additional information about the status is displayed.

When contacting Producer Services, please provide the Application Confirmation Number and Application Status Message.
## Application Status

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Hover Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed due to Incomplete Application</td>
<td>Closed due to missing info or by request. Please re-apply if needed.</td>
</tr>
<tr>
<td>Closed by Request</td>
<td>Closed due to missing info or by request. Please re-apply if needed.</td>
</tr>
<tr>
<td>Declined in Underwriting</td>
<td>Application has been declined during Underwriting process. Contact the Support team for details.</td>
</tr>
<tr>
<td>At Prospect’s Request</td>
<td>None</td>
</tr>
<tr>
<td>Processing, No issues to report</td>
<td>Application is currently being processed.</td>
</tr>
<tr>
<td>See status below</td>
<td>Application is currently being processed</td>
</tr>
<tr>
<td>Submitted to CMS for approval</td>
<td>None</td>
</tr>
<tr>
<td>Please contact our Support team.</td>
<td>None</td>
</tr>
<tr>
<td>CMS approved request to enroll</td>
<td>None</td>
</tr>
</tbody>
</table>
### Application Status, Continued

<table>
<thead>
<tr>
<th>Status Displayed</th>
<th>Hover Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Application has been approved. Member will be/is active on effective date.</td>
</tr>
<tr>
<td>Request to cancel was received</td>
<td>None</td>
</tr>
<tr>
<td>Terminated by Request</td>
<td>None</td>
</tr>
<tr>
<td>Contact Producer Services</td>
<td>Contact your broker or Customer Support</td>
</tr>
<tr>
<td>Enrollment Denied by CMS</td>
<td>Enrollment Denied by CMS</td>
</tr>
<tr>
<td>ID Card Sent</td>
<td>ID Card Sent</td>
</tr>
<tr>
<td>Received</td>
<td>Application has been received.</td>
</tr>
<tr>
<td>Terminated</td>
<td>Application cancelled before effective date.</td>
</tr>
</tbody>
</table>
Prospect Application Status Site

To check your application status, enter required information below (marked with *).

First Name *

Last Name *

Date Of Birth *

Medicare ID Number *

Confirmation Number

Search

Clear form

You can share the confirmation number with your client, so they too can check the status of their application.

Link to Prospect Application Status Site:

BrokerWebApp: Blue Shield of California (blueshieldca.com)
Client List
Broker Connection Site
View Section
Client List (OLCL) Recent Updates

- Powerful data exporting options
- Send ID cards to the client
- Send Payment reminders to the client
Client List

The Client List displays your prior and newly enrolled clients.

Note

Pending and prospective clients are not displayed on this list.

To view pending or prospective clients, refer to your Dashboard in the Compare Plan & Enroll application.

Click on the Medicare tab on the navigation bar to open the menu.

1. Select View Client List from the menu.
### Client List

**To perform a search, enter at least one criteria in its corresponding field.**

**Example:**
Use the filters (highlighted in yellow) to narrow your search by Subscriber Plan Type:

- Medicare Supplement Plans
- MAPD
- PDP

You can sort the results by:

- Payment Status
- Last Name
- Subscriber ID

1. Click the **Search** button to execute the search.

2. To clear search results, click the **Clear Form** button.

---

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The Client List provides a snapshot of your client’s enrollment data including:

- Payment Status
- Name
- Subscriber ID
- Plan Name
- ID Card
- Manage Payments
- Last Payment Received

You can provide a copy of your clients’ ID Card by downloading a PDF version for print, sending their ID via email, or emailing instructions to download via the Member Portal.

3. Click **Get ID card** to view options to send the ID card.
Get ID Cards

When you click on Get ID card, you will see a pop window with your client's available ID cards for their plans.

In some cases, the ID card may not be ready yet; however, you can email your client to let them know, and help them schedule services with their provider by clicking the send email button.

4. **Select** the Coverage and click continue.

5. **Select** a method to provide this ID card to your client and click continue.

Example:

To download the ID card, select the download option and click Continue.

A PDF of the ID will be downloaded for printing.
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Client List

To send via email, select the "Receive ID card via member portal", and click continue.

A form is displayed with the client’s Member ID and directions for logging to the Member Portal.

Again, for security reasons, you won’t be able to send an email to yourself or receive a copy of the email.

7. Click send.
### Client List

#### Download Client List and Statements

19. Client data can be exported to Excel and sorted to your specifications by clicking the **Download client list link**.

20. Click **Statement** to view the current statement.

---

<table>
<thead>
<tr>
<th>Payment status</th>
<th>Name</th>
<th>Subscriber ID</th>
<th>Plan</th>
<th>ID card</th>
<th>Last Payment Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>LATE</td>
<td>Sachin Sharma</td>
<td>98133636</td>
<td>Blue Shield Inspire (PPO)</td>
<td>Get ID card</td>
<td>5608.35</td>
</tr>
<tr>
<td>LATE</td>
<td>Dhoni Singh</td>
<td>98133636</td>
<td>Blue Shield Inspire (PPO)</td>
<td>Get ID card</td>
<td>5608.35</td>
</tr>
<tr>
<td>LATE</td>
<td>Jason Pollard</td>
<td>98133636</td>
<td>Blue Shield Rx Enhanced (PPO)</td>
<td>N/A</td>
<td>117.80</td>
</tr>
<tr>
<td>LATE</td>
<td>Kershon Shamba</td>
<td>98133636</td>
<td>Blue Shield Rx Enhanced (PPO)</td>
<td>N/A</td>
<td>117.80</td>
</tr>
<tr>
<td>LATE</td>
<td>John Livingston</td>
<td>918253</td>
<td>Medicare Supplement Plan N</td>
<td>Get ID card</td>
<td>470.00 Statement</td>
</tr>
<tr>
<td>LATE</td>
<td>Bill Gates</td>
<td>918253</td>
<td>Medicare Supplement Plan N</td>
<td>Get ID card</td>
<td>410.60 Statement</td>
</tr>
<tr>
<td>LATE</td>
<td>Meyer Kung</td>
<td>91825555</td>
<td>Medicare Supplement Plan A</td>
<td>Get ID card</td>
<td>822.00 Statement</td>
</tr>
</tbody>
</table>

---

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Client List

Showing results 1 - 10 of 184

21. Click the arrow to expand the line to view additional account details.

Click the arrow again to close the expanded details.

The additional details include:

- Demographic information for the client.
- Information regarding rate changes and notifications.
- Original effective dates and cancellation dates for those who have recently left the plan.
- The NPN for the writing agent.
Order Presale Kits
Blue Shield Online Store

View Section
Order presale kits

1. Click the Medicare tab at the top of the page.
2. Select Enrollment Materials for the list.
Order presale kits

Note:
The default view of the menu is expanded for MAPD.

To expand the other sections, click the triangle.

4. Click on the Plan type to expand the tab.

5. Select the County/Plan from the list.
Order presale kits

6. Select the type of materials you want to order.

7. Click the Order button.
Order presale kits

8. Select the quantity.

9. Click the Add to Cart button.

Important:
To ensure your kits ship as soon as they are available, submit separate orders for each language.

NOTE:
You can click the PDF icon next to the amount field to view and print the information.
Order presale kits

10. Click on the basket to view the order.

11. Enter the shipping information.

12. Click Validate Address.

13. Select Place Order to complete the order.
Marketing Materials
Download Advertising Materials

View Section
Advertising Materials

1. Click the Medicare tab at the top of the page.

2. Select Advertising & Marketing Resources from the list.

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Advertising Materials

5. Enter your Username & Password

6. Click the Login button to continue to the home screen.
Advertising Materials

7. Filter the catalog by selecting one or more options from the left panel.
8. To select marketing collateral, click on the item.
9. Navigate between pages using the forward and back buttons.

Pro Tip:
For quicker access to an item, you can click the heart icon to save it to your favorites.

You can also click the pencil icon on each item card to customize it with your personalized contact information.
Advertising Materials

A preview of the marketing collateral is displayed.

10. Click the Customize button to add your personalized contact information.
Advertising Materials

11. Enter your information.
12. Click the Preview button to continue to the next screen.
Advertising Materials

13. To complete the customization and exit the screen, click the Done button.
Advertising Materials

14. Click the Done button save and print your marketing collateral.
Advertising Materials

15. Click the Download button to save and print your marketing collateral.

16. To return to the main screen, click the Back to Catalog link at the top right of the screen.
Commission Statements
Broker Connection Site

View Section
New Commission Statements

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.
Check status

Online client list
At a glance, see who’s late, send reminders, email your clients ID card links, and quickly do business.
Manage your client list

Rewards & commissions
See our competitive broker commissions and special bonus programs.
View commission updates

Small business renewal center
Your single source for renewals,quotes, and maintenance.
Visit the center

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Check Out All The Features...

1. Hello, [Broker Name]:
   This option allows brokers to exit the tool while still remaining in Producer Connection. The tool will automatically log brokers out of the Broker Compensation Tool after 10 minutes of inactivity but will still be logged into PC.

2. Statements Detail:
The “home page” automatically defaults to the Statements webpage where brokers can select, search, view, print, and download easy-to-read PDF versions of their statements.

3. Commission Detail:
The Commission Detail webpage allows sub brokers/writing agents to search for commission information by month/year so they can view the details of a sale they participated in but did not receive a statement for the month.

- Statement Detail Extract
  Select a statement to view “Statement Detail” screen, and download a .xls/.csv data extract for that statement period.

- PDF Statement!
  Click to download.

- Commission Detail Report
  Provides commission details for sub-brokers/writing agents who are being paid through their agency and not directly by Blue Shield.

- “Pay Entity ID”
  System-assigned producer ID to replace TIN on statements.
### New Commission Statements (Broker Only Statement)

All your Senior business is now located in **one statement!**

**Note**

Agents contracted with both Blue Shield and Blue Shield Promise, will need to contact their FMO/Agency for all Blue Shield Promise related business.

---

#### Commission Statement

**Blue Shield of California**

**Statement Date:** 11/16/2023

**Medicare Supplement Commissions**

<table>
<thead>
<tr>
<th>Writing Producer</th>
<th>0012.</th>
<th>KRUUK KUGB BGKGGKGGK GKD DURGGKUD, GKK</th>
<th>NPN 123456789</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Number</td>
<td>Sub ID</td>
<td>Customers Name</td>
<td>Product</td>
</tr>
<tr>
<td>X000</td>
<td>908</td>
<td>George, Clark</td>
<td>Med Supp</td>
</tr>
<tr>
<td>X000</td>
<td>909</td>
<td>George, Clark</td>
<td>Med Supp</td>
</tr>
<tr>
<td>X000</td>
<td>906</td>
<td>KKKK, DKKLD</td>
<td>Med Supp</td>
</tr>
<tr>
<td>X000</td>
<td>906</td>
<td>KKKK, DKKLD</td>
<td>Med Supp</td>
</tr>
<tr>
<td>X000</td>
<td>909</td>
<td>Samuel, Nick</td>
<td>Med Supp</td>
</tr>
<tr>
<td>X000'</td>
<td>909</td>
<td>Test, Feb</td>
<td>Med Supp</td>
</tr>
<tr>
<td>X000</td>
<td>909</td>
<td>Test, Feb</td>
<td>Med Supp</td>
</tr>
</tbody>
</table>

**Effective Date:** 09/22/2023

**Period:** 09/22/2023

**Gross Premium:** $560.00

**Base Premium:** $560.00

**Commission Rate:** 10.00%

**Commission Paid:** $59.80

---

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Viewing Commission Detail

The Commission Detailed Statements provide a list of commissions paid to the writing agent for a given period (i.e., Jan, Feb, etc.).

1. Enter the year and month where dues were received (08/2016 earliest).
2. Click Run Report.
3. To export the information, click the Save button.
4. Select a format to save the exported information.

Note
Transactions where commissions are paid to an FMO/Agency will not be visible to the writing agent.
Commission Schedule

2023 Broker Payout Calendar

Commissions are paid out during the second week of each month.

Note:
Once released, payment is delivered within 2-5 business days.

Commissions are based on paid member premiums. Premiums received after the commission cutoff date will be paid on the next commission payout date.
Resources

- Broker Connection Site: https://www.blueshieldca.com/producer
- Shield on Demand Site: http://www.shieldondemand.com/
- Consumer Application Status Site: https://www.blueshieldca.com/brokerwebapp/medicareProspectAppStatus