

Broker Connection Site

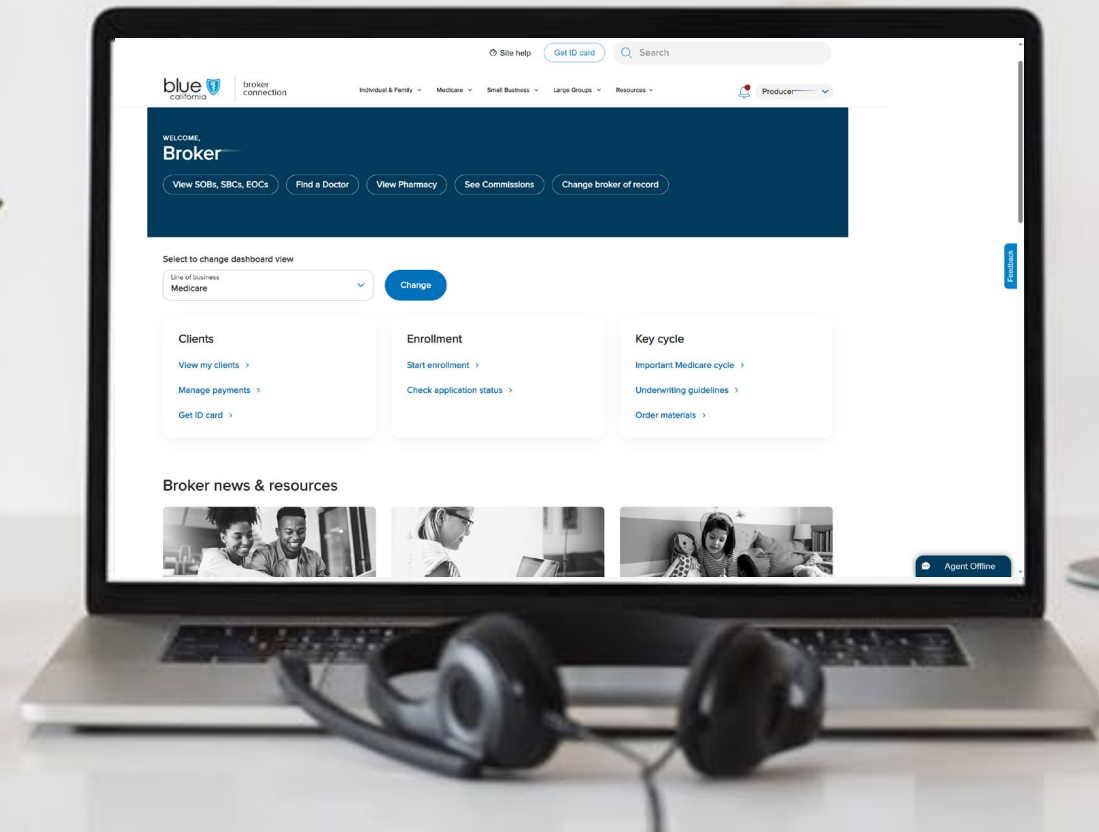
Quick Reference Guide

Oct 2025

Y0118_25_523A_C 09292025

H2819_25_523A_C 09292025

View Quick Reference Guide



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.

Who can create a Broker Connection account?

Only brokers already appointed with Blue Shield of California can create Broker Connection accounts.

They may be independent brokers or brokers who own the tax ID number of their agency.

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.

Account Profile Descriptions

Account Profiles

	Support staff	Sales agent	Subagent	Administrator	Primary agent*
Order sales materials	✓	✓	✓	✓	✓
Use enrollment tools	✓	✓	✓	✓	✓
Access their client list		✓	✓	✓	✓
View their commissions		✓	✓	✓	✓
View application status		✓	✓	✓	✓
Access agency client list			✓	✓	✓
View agency commissions			✓	✓	✓
Create and manage user accounts				✓	✓
Update agency profile					✓
Change direct deposit details					✓

✓ Optional

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

The table below shows what each account profile can do on Broker Connection.

There are 5 types of profiles for Broker Connect accounts.

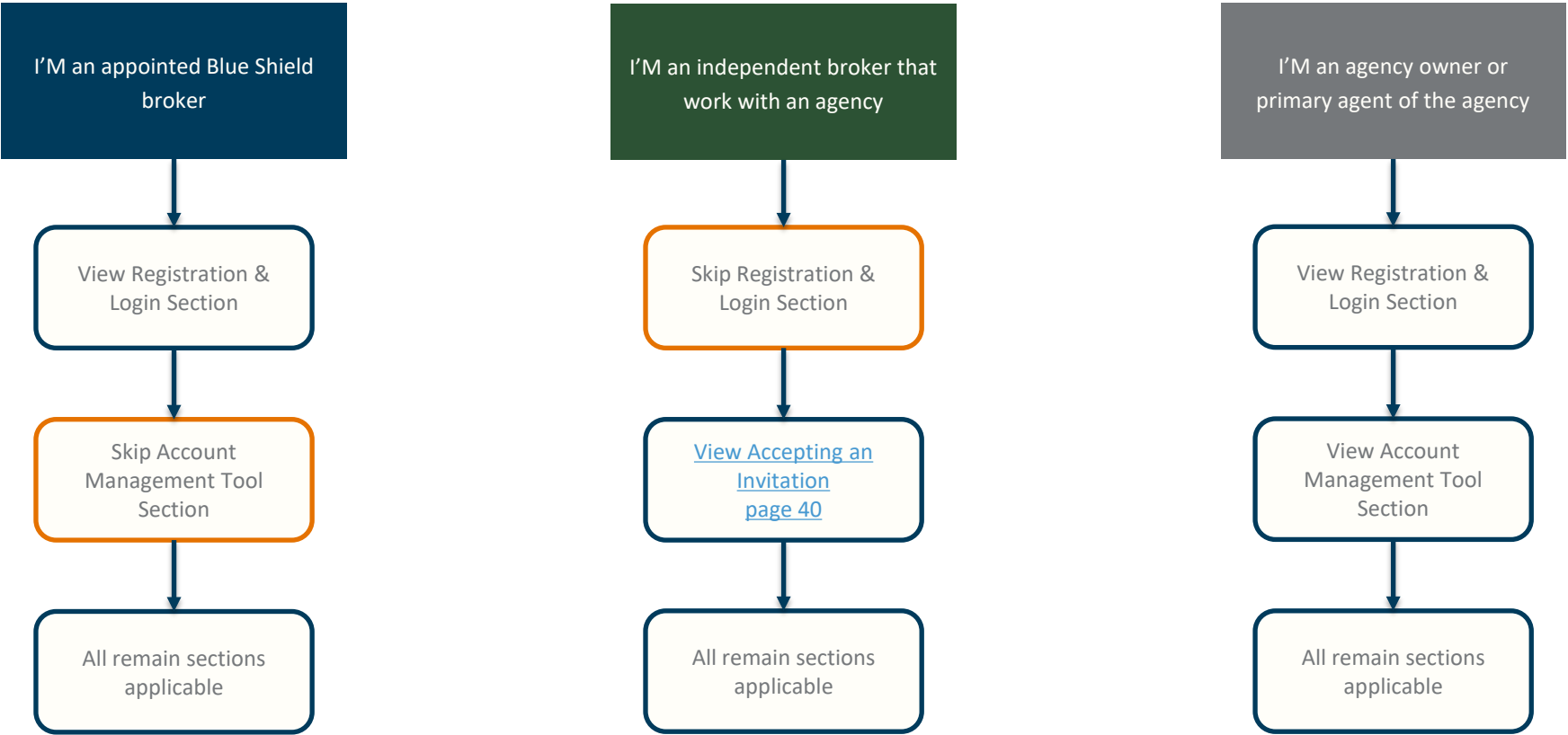
By default, if you are an appointed Blue Shield broker that is registering for an account for the first time and is not affiliated with an agency, your account profile is automatically set to the highest profile – "Primary Agent role".

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



Section to View

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.



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.

Link to
Broker Connection

Blue Shield Broker Connection site:

<https://www.blueshieldca.com/en/broker>

Blue Shield Producer Services
Phone Number:

1-800-559-5905


Broker Connection Registration Experience

Blue Shield of California

[View Section](#)



Registration Options




broker
connection

Individual & Family Medicare Small Business Large Groups Resources

Search

Login or Register


 — Option 2


WELCOME TO

Broker
Connection

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

Log in to your account






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 appointed >](#)  — Option 1

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

Register

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



Individual & Family Medicare Small Business Large Groups Resources

Search

Login or Register

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Join us and watch your business grow.

[Get appointed >](#)

1



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.

Get Appointed

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.

Check 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.

Apply for Appointment

Only brokers already appointed with Blue Shield of California can create Broker Connection accounts.

They may be independent brokers or brokers who own the tax ID number of their agency.

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.

To [Apply for appointment](#), you will need:

- Tax ID number
- DOI (Dept. of Insurance) license number
- Email address
- Both Accident & Health or Sickness and Life licenses
- Errors & Omissions (E&O) Insurance Certificate
- Direct deposit information



Broker Connection Registration Experience

Option 2: Register and Log In


Registration Steps

1. Click the **Register** 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.


 > Welcome to Broker Connection

Welcome to Broker Connection

Log in

 Username

Password

Show 

☐ Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process](#).


Register

1

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

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BLUE SHIELD OF CALIFORNIA 10

Register for Broker Connection

Important:

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



What lines of business do you sell?

Select all that apply.

2

Individual & family plans

✓

Medicare

✓

Small business

Large group

3

< Back

Continue

Registration Steps

Regardless of the option you have chosen (get appointed or register), you will follow the same steps.

This is the first of a 6-step process to create an account.

You'll see an indication bar, along the top, to let you know where you are in the process.

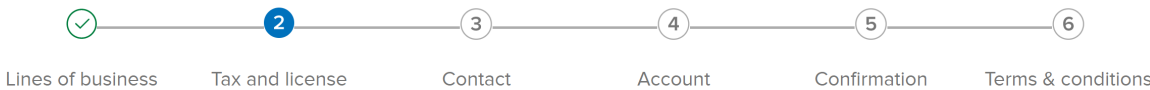
2. **Select the lines of business** that you sell.

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



Tax and license information

Enter the tax ID number (TIN) for your agency or your Social Security number (SSN).

4

☒ Get appointed with Blue Shield of California

Agency TIN or your SSN* ⓘ

Tax and license information

Enter the tax ID number (TIN) for your agency or your Social Security number (SSN).

☐ Get appointed with Blue Shield of California

5

Agency TIN or your SSN* ⓘ

Department of Insurance (DOI) license number*

National Producer Number (NPN) ⓘ

Agency ZIP code*

6

Continue

Registration Steps

4. Select “**Get appointed with Blues 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 (*).

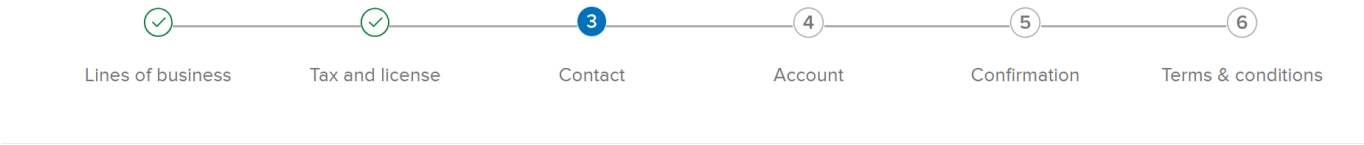
6. Click the **Continue** button to move to the next step.

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



Contact information

7

First name*

Middle initial

Last name*

Email*

Primary phone type*

☒ Office

☐ Mobile

Primary phone*

Ext.

Producer type*

☒ Individual

☐ Agency owner

Continue

8

< Back

Registration Steps

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

Lines of business

9

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

Continue

10

Phone*
4159410265

Ext.

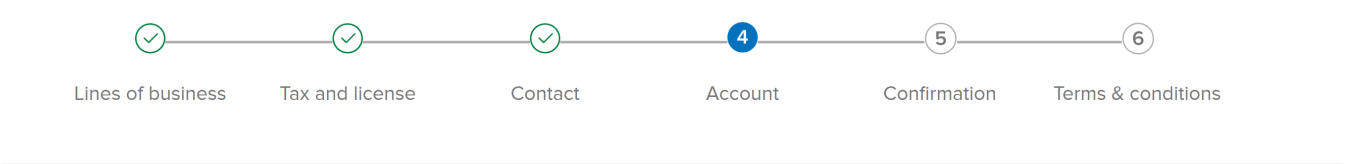
s & conditions

Feedback

Registration Steps

- A pop-up window will appear asking if you have a broker connection account.
- If you have a Broker Connection account, your current client list with new information you just entered will be merged.
- 9. For the question, **select a response**.
 - 10. Click the **Continue** button to move to the next step.

Register for Broker Connection



11

Account setup

Create a username

Your username must have:

- 8-20 characters
- Unique identification
- Numbers and letters only
- No spaces

Create a password

Show

Your password must include:

- 8-20 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- A number or symbol (?#!)
- No spaces

Confirm password

Show

12

Continue

Registration Steps

If you selected no to the question, you will be prompted to create a username and password.

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.

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@blueshieldca.com

Account setup

Username	4BobSmtih
----------	-----------

Lines of business

Lines of business	Individual & family plans
-------------------	---------------------------

13 Continue

Registration Steps

Confirm the account information. If there are any errors, please use the back button to make edits.

13. Click the **Continue** button to move to the next step.

Feedback



Register for Broker Connection



> [Create an account](#)



Terms and conditions

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).

Registration Steps

Review **Terms and Conditions** information.

14. Scroll down the page to agree to the terms and conditions.

14



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

Continue

Registration Steps

For your digital signature, **enter your full name, and select today's date.**

15. To complete your registration, click the **Continue** button.

Register for Broker Connection



broker
connection

Individual & Family

Medicare

Small Business

Large Groups

Resources

[Home](#) > [Create an account](#)

You're almost done!

Check your inbox. You should have received an email requesting that you confirm your email address. The verification button will expire in 24 hours. Once you've verified your email address, return here and select Close.

16

Close

If you haven't received your email confirmation, you can [send another one](#).

Registration Steps

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.



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

17

Follow Blue Shield



Registration Steps

The Verification button within the email will expire in 24 hours.

Check your email inbox for the “**Activate your Broker Connection account**” email.

17. To complete the account creation process, **click the Verification button.**

Register for Broker Connection



Lines of business

Tax and license

Contact

Account

Confirmation

Terms & conditions



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

Log in

18

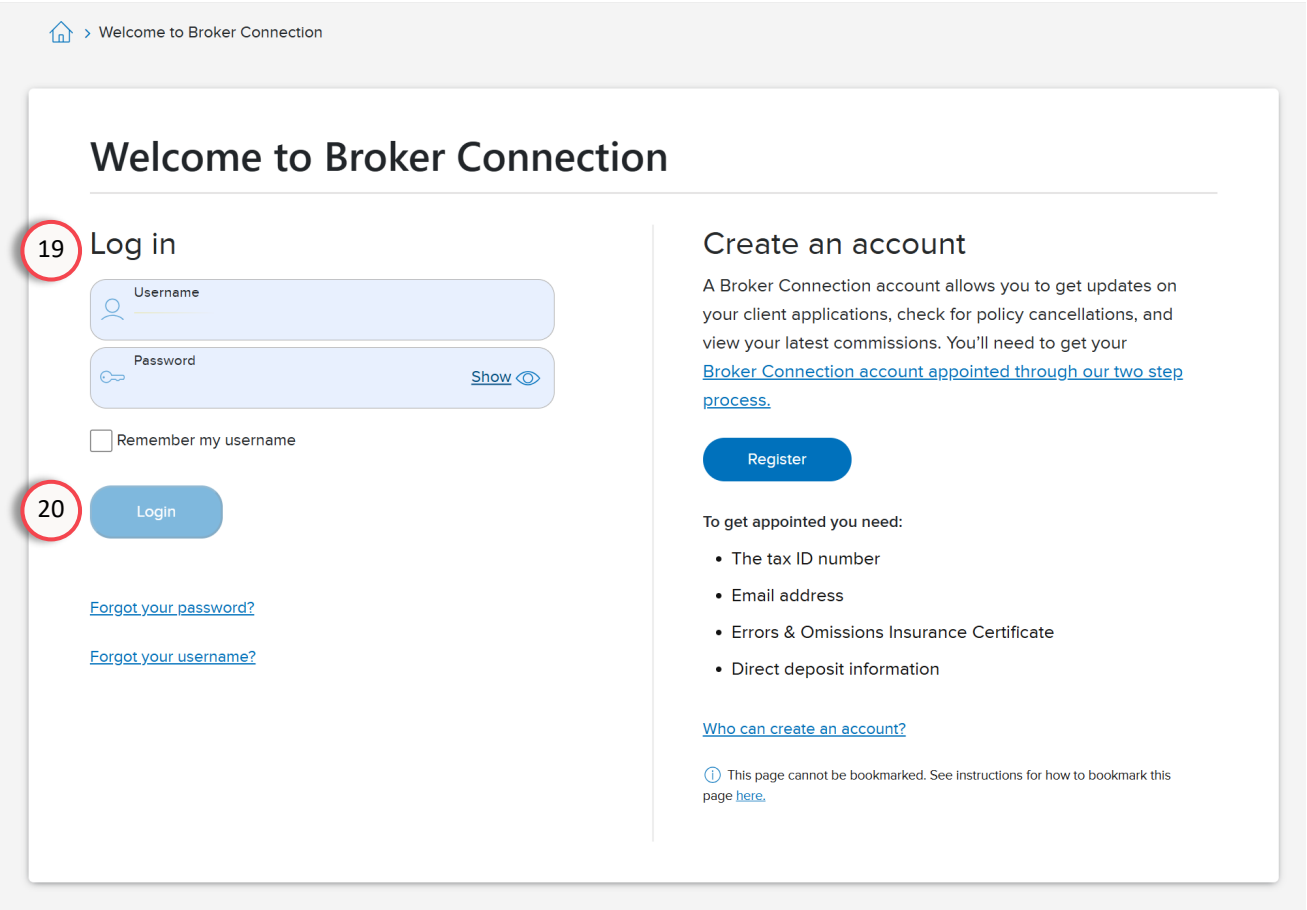
Registration Steps

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.**



Broker Connection



Log in

- 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

Registration Steps

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

AA Increase Text Size

blue shield of california

broker connection

Individual & Family Medicare Small Business Large Groups Resources

Search

Login or Register

WELCOME TO

Verify new email address

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

N/A

Resend email

CancelOK

Join us and watch your business grow.

Get appointed >

Get the most from your Broker Connection account



Broker Connection

Site help

Get ID card

Search



broker
connection

Individual & Family

Medicare

Small Business

Large Groups

Resources



Smith

WELCOME,

Valued BrokerBroker

Take a tour

View SOBs, SBCs, EOCs

Find a Doctor

View Pharmacy

See Commissions

Change broker of record

Manage users

Select to change dashboard view

Line of business
Medicare (default)



Set as default

Clients

View my clients

Manage payments

Get ID card

Enrollment

Start enrollment

Medicare Submitted Applications

Key cycle

Important Medicare cycle

Underwriting guidelines

Medicare certification

Order materials

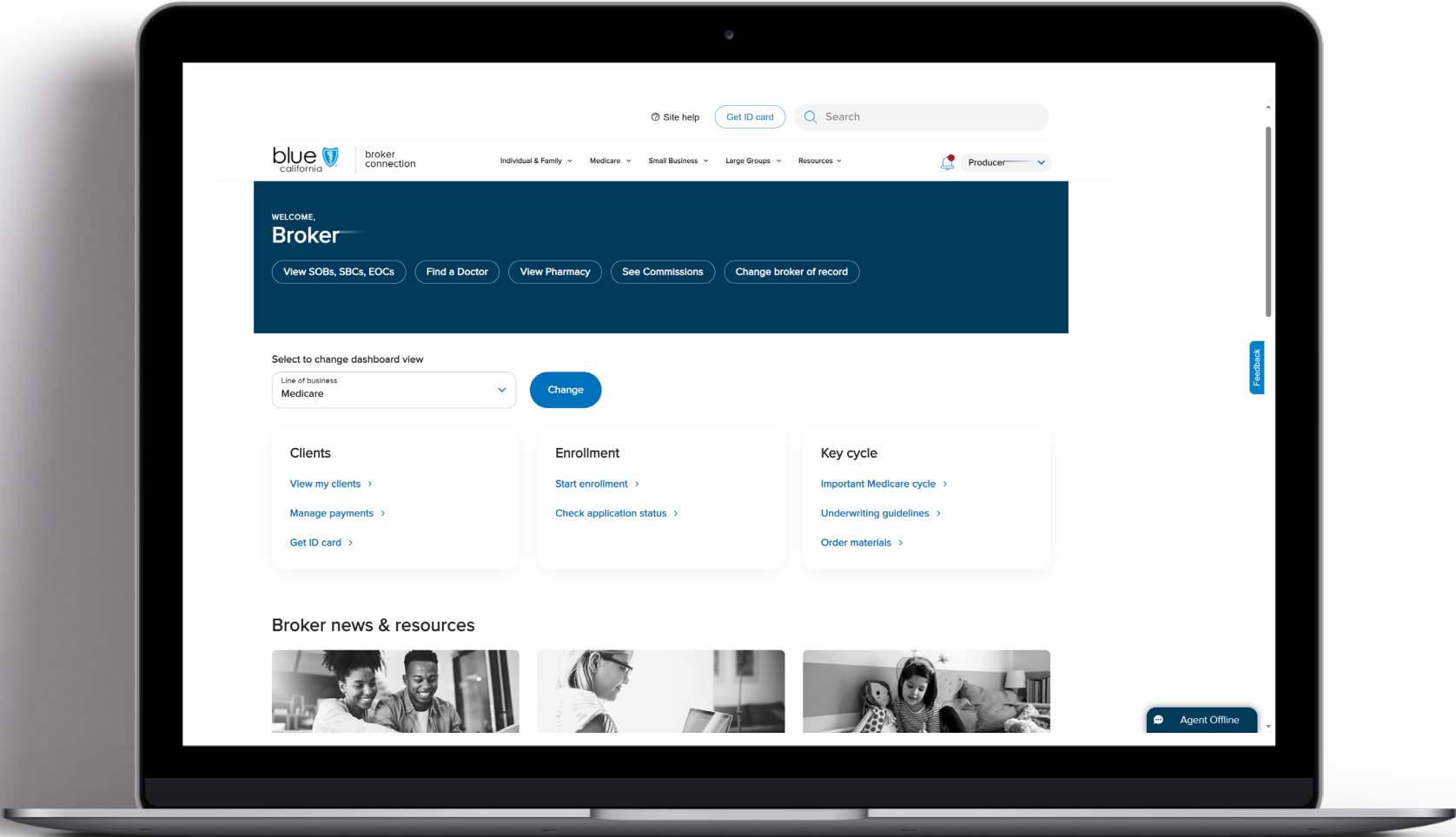
Authenticated
Home Page

You are now logged into Broker Connection.

From the home page you can use the dashboard to access various broker tools to help manage your book of business including:

- Clients
 - View my clients
 - Manage payments
 - Get ID cards
- Enrollment
 - Start enrollment
 - Check application status
- Key Cycle
 - Important Medicare cycle
 - Underwriting guidelines
 - Order materials

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-digitcode 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

Steps

1. Enter your **Username and Password** information and **click the Login button**.

> Welcome to Broker Connection

Welcome to Broker Connection

Log in

1

Username

Password

Show

☐ Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process](#).

Register

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

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BLUE SHIELD OF CALIFORNIA

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Completing a 2-Step Verification

Steps

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**.



Log in with 2-step verification

We've sent a verification code to (mr****@blueshieldca.com).

Enter that code here.

2

Code
|

Confirm

Time remaining 09:50



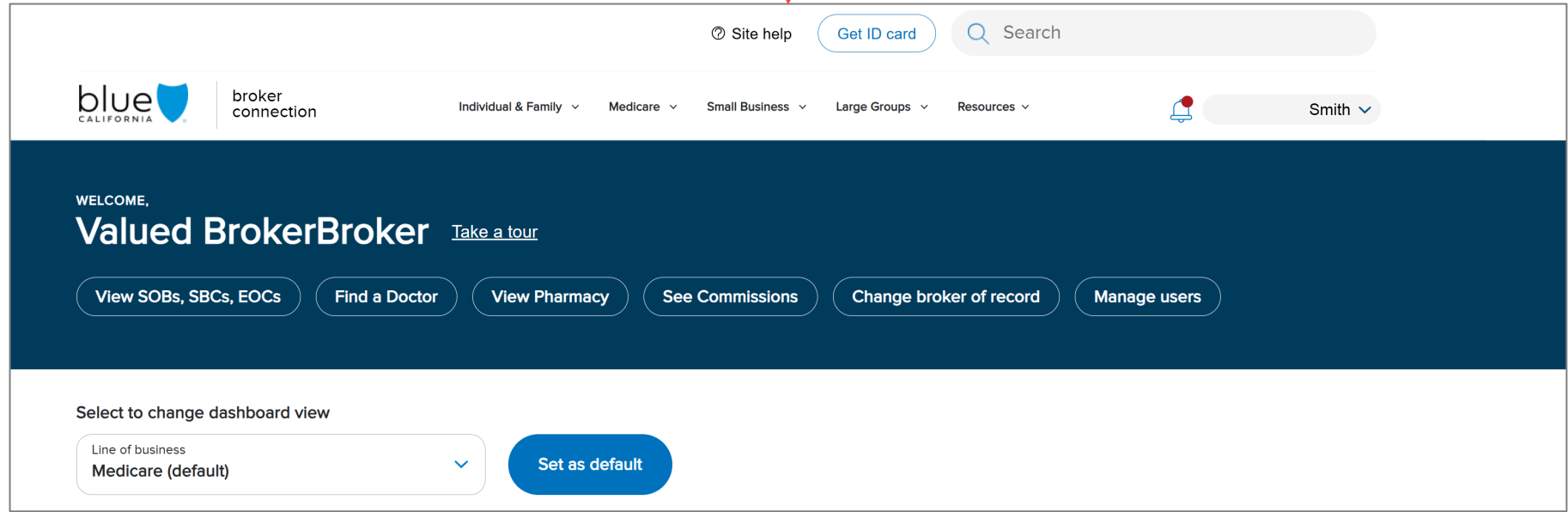
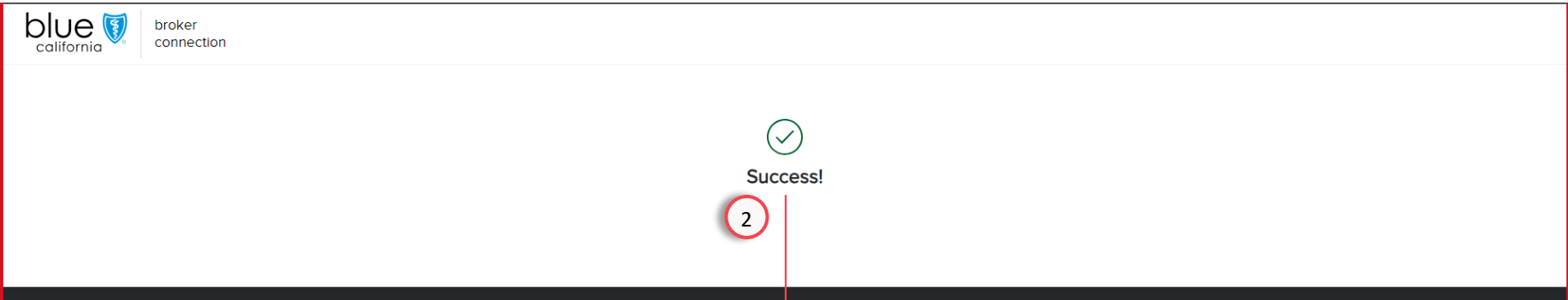
Didn't get the code?

- There may be a delay in processing. Wait a few minutes and check again.
- Check your spam folder
- [Resend code](#)

Need help? Contact Producer Services at (800) 559-5905



Completing a 2-Step Verification



Steps

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



Primary Agents & Agency Owners

Account Management Tool

[View Section](#)



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.

Role-based Permissions






User account functionality is determined by role-based permissions and easily set or changed anytime by your designated primary agent.





Register and Log In



broker
connection

Individual & Family  Medicare  Small Business  Large Groups  Resources 

 Search

Login or Register 


1


WELCOME TO

Broker
Connection

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Log in to your account





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Join us and watch your business grow.

[Get appointed >](#)

Register

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


Register and Log In

Registration Steps

2. Enter your **Log In** information and **click the Continue button**.

Note:

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

 > Welcome to Broker Connection

Welcome to Broker Connection

2

Username

Password

Show

Remember my username

Login

Forgot your password?

Forgot your username?

Create an account

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Register

To get appointed you need:

The tax ID number

Email address

Errors & Omissions Insurance Certificate

Direct deposit information

Who can create an account?

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BLUE SHIELD OF CALIFORNIA 33

Broker Connection

Site help

Get ID card

Search

blue CALIFORNIA

broker connection

Individual & Family

Medicare

Small Business

Large Group

Resources

Smith

RESOURCES

Broker Compensation

Advertising & Marketing Resources

Order Materials

Update Your Profile

Direct Deposit

Manage your accounts

Rewards & Commissions

Mandates Information

Personalize Your Website

Email Producer Services

Broker Communications

Broker of Record Change

Quick Links for Brokers

Tools & Resources

Find a Doctor

Pharmacy

Health & Wellness

Contact Us

Be a Blue Shield of CA Broker

Select to change dashboard view

Line of business

Medicare (default)

Set as default

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

Create an account

[Need help?](#) [Need to add a delegate?](#)

Pending accounts

5

Name	Role	Email		LOB	Expires	Action
As Sa	Subagent	as@email.com	Edit	Small Groups	2024-06-19	Resend Invite
Subagent Test	Subagent	coverageoptions@blueshieldca.com	Edit	IFP	2024-06-17	Resend Invite
John Jacob	Primary agent	testabcdxyz@blueshieldca.com	Edit	IFP	2024-06-10	Resend Invite

< 1 2 3 4 >

Showing 1 – 5 of 17 pending accounts

6

Active and deactivated accounts

Filter

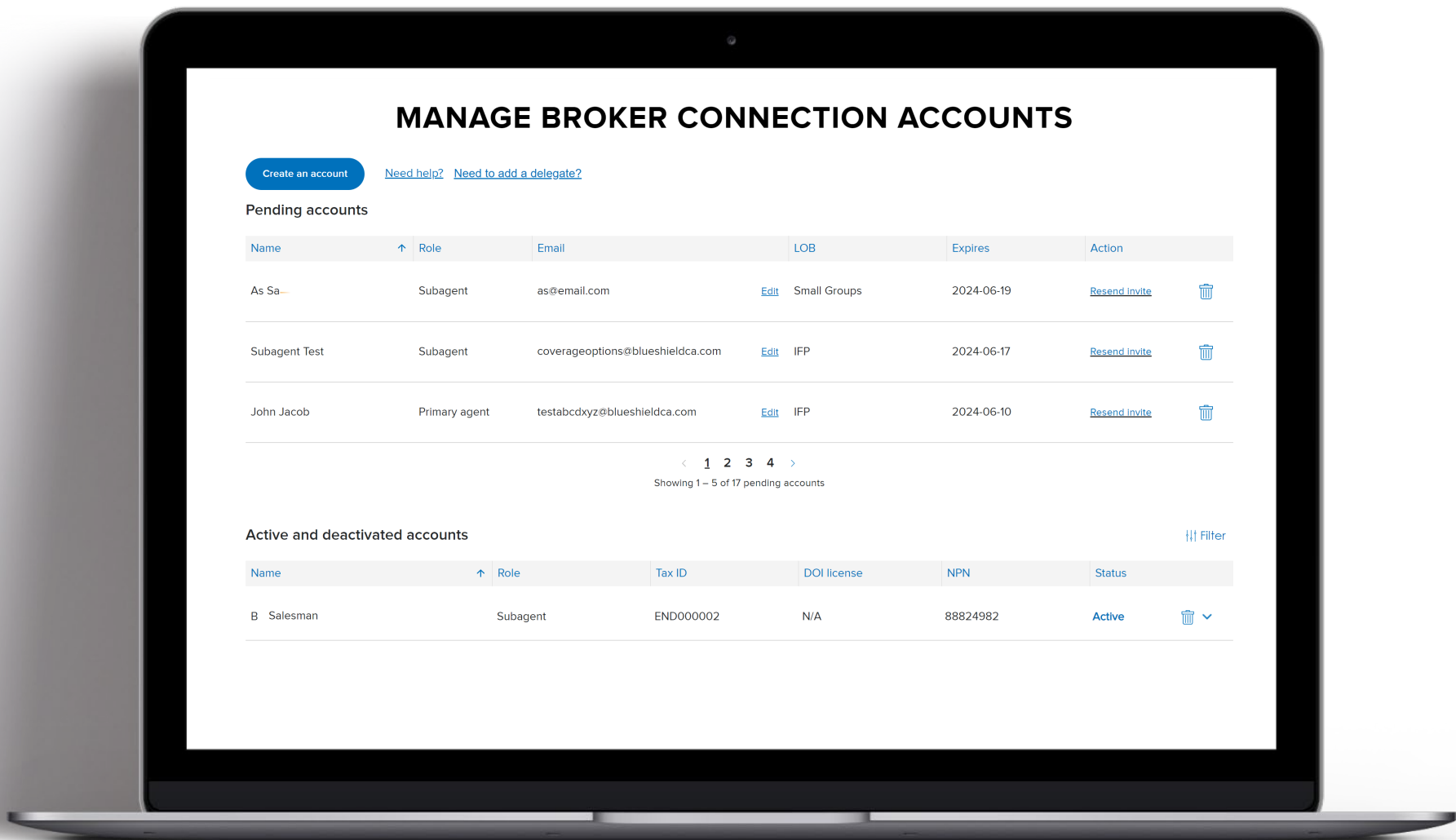
Name	Role	Tax ID	DOI license	NPN	Status	
B Salesman	Subagent	END000002	N/A	88824982	Active	

Registration Steps

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

- At the top of the page, is the Pending Accounts section, which are accounts that were newly invited to register.
- And at the bottom of the page, there the active and deactivated accounts.

Managing Accounts



Managing Accounts: Pending Accounts

MANAGE BROKER CONNECTION ACCOUNTS

Pending Accounts

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.

Create an account

[Need help?](#) [Need to add a delegate?](#)

Pending accounts

Name	↑	Role	Email		LOB	Expires	Action
As Sa		Subagent	as@email.com	Edit	Small Groups	2024-06-19	Resend invite 
Subagent Test		Subagent	coverageoptions@blueshieldca.com	Edit	IFP	2024-06-17	Resend invite 
John Jacob		Primary agent	testabcdxyz@blueshieldca.com	Edit	IFP	2024-06-10	Resend invite 

< 1 2 3 4 >

Showing 1 – 5 of 17 pending accounts

Active and deactivated accounts

Filter

Name	↑	Role	Tax ID	DOI license	NPN	Status
B Salesman		Subagent	END000002	N/A	88824982	Active  

Managing Accounts: Active and Deactivated Accounts

John Jacob	Primary agent	testabcdxyz@blueshieldca.com	Edit	IFP	2024-06-10	Resend invite	
------------	---------------	------------------------------	----------------------	-----	------------	-------------------------------	--

< 1 2 3 4 >

Showing 1 – 5 of 17 pending accounts

Active and deactivated accounts

Filter

Name	Role	Tax ID	DOI license	NPN	Status
B Salesman	Subagent	END000002	N/A	88824982	Active

Contact information

Username

Batman01

Email

Batman@gmail.com

Phone

4878757858

Change role

Subagent

☐ Access agency client list

☐ View agency commissions

Add/remove lines of business

☒ IFP

☒ Medicare

☐ Small Groups

☐ Large Groups

Account status

☒ Active

☐ Deactivated

Cancel

Save

Active & Deactivated Accounts

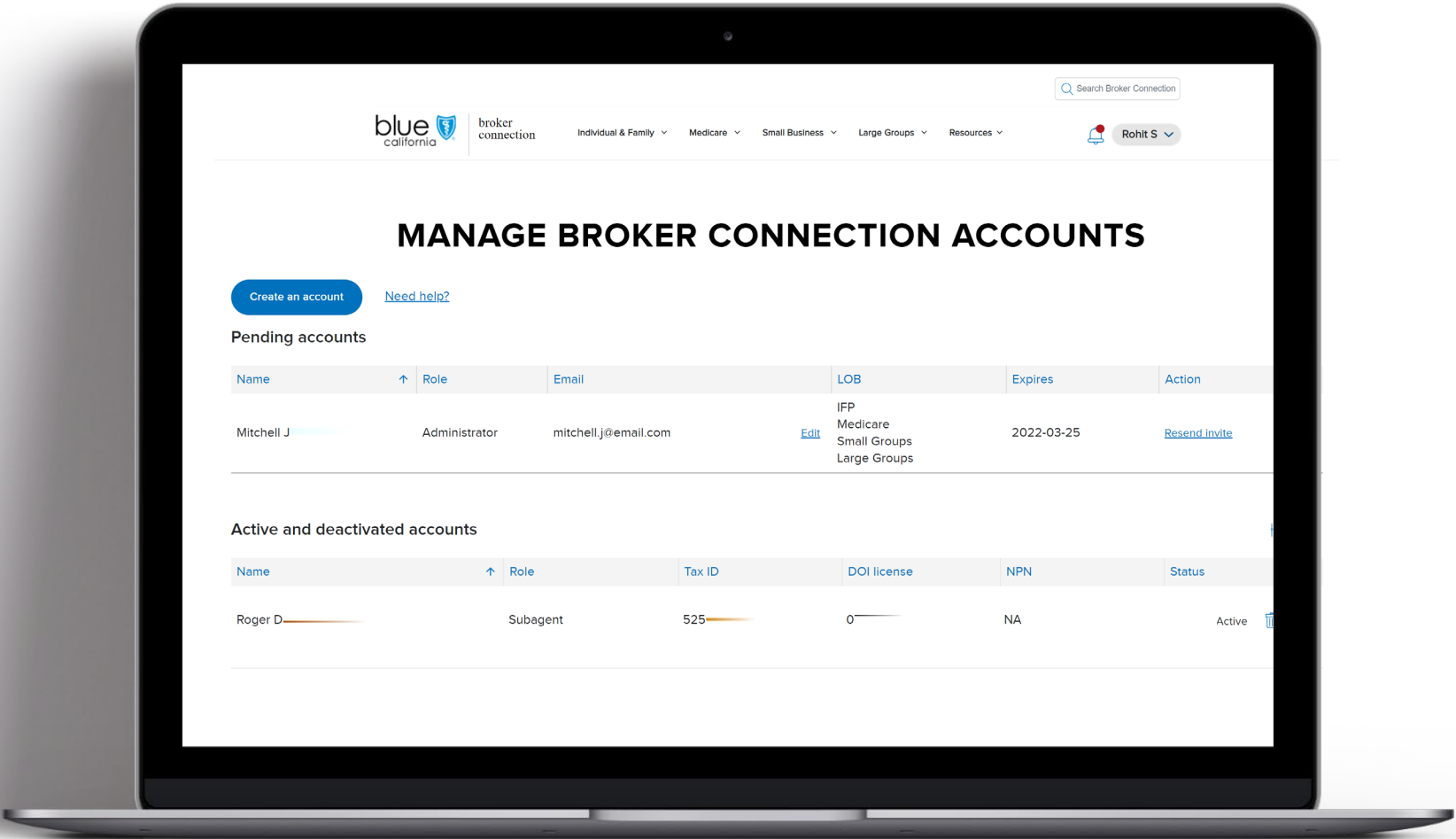
Once the user accepts the invite and creates the account, it will move to Active accounts section.

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



Create an Account

Create an Account

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


MANAGE BROKER CONNECTION ACCOUNTS

1

Create an account

[Need help?](#)

Pending accounts


Name	Role	Email	LOB	Expires	Action
Jasprit B	Primary agent	93@email.com	Edit IFP Medicare Small Groups Large Groups	2022-03-22	Resend invite 

Active and deactivated accounts


 [Filter](#)


No accounts.

Create an Account

 broker connection

Individual & Family ▾ Medicare ▾ Small Business ▾ Large Groups ▾ Resources ▾

 Rohit S ▾

 > Create an account

1

2

3

4

Assign a role

Lines of business

Personal details

Confirmation

Assign a role

You can change the role later after the account is created.

- 2
- ☐ Support Staff
- ☐ Sales agent
- ☒ Subagent
- ☐ Administrator
- ☐ Primary agent

Select optional subagent permissions

- 3
- ☒ Access agency client list
- ☒ View agency commissions

4

Continue

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.

Create an Account

What can each role do?

	Support staff	Sales agent	Subagent	Administrator	Primary agent*
Order sales materials	✓	✓	✓	✓	✓
Use enrollment tools	✓	✓	✓	✓	✓
Access their client list		✓	✓	✓	✓
View their commissions		✓	✓	✓	✓
View application status		✓	✓	✓	✓
Access agency client list			✓	✓	✓
View agency commissions			✓	✓	✓
Create and manage user accounts				✓	✓
Update agency profile					✓
Change direct deposit details					✓

✓ Optional
*Primary agents can create up to 4 other primary agent accounts.

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 a 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.




Create an Account

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.



broker connection


Individual & Family


Medicare


Small Business


Large Groups

Resources


 Search Broker Connection

 Rohit S


 > Create an account




Assign a role



Lines of business




Personal details




Confirmation

5

Individual & family plans



Medicare



Small business

Large group

6

Continue

Choose lines of business

This is just for our information. It won't affect user access.

BLUE SHIELD OF CALIFORNIA 44



Create an Account



Account created



Account info

Name: Bob Smith Role: Salesagent
Email: _____

We emailed **Bob Smith** a link to activate their account. They need the last 4 digits of the agency's tax ID for activation.

The link expires in 7 days.

Return to dashboard

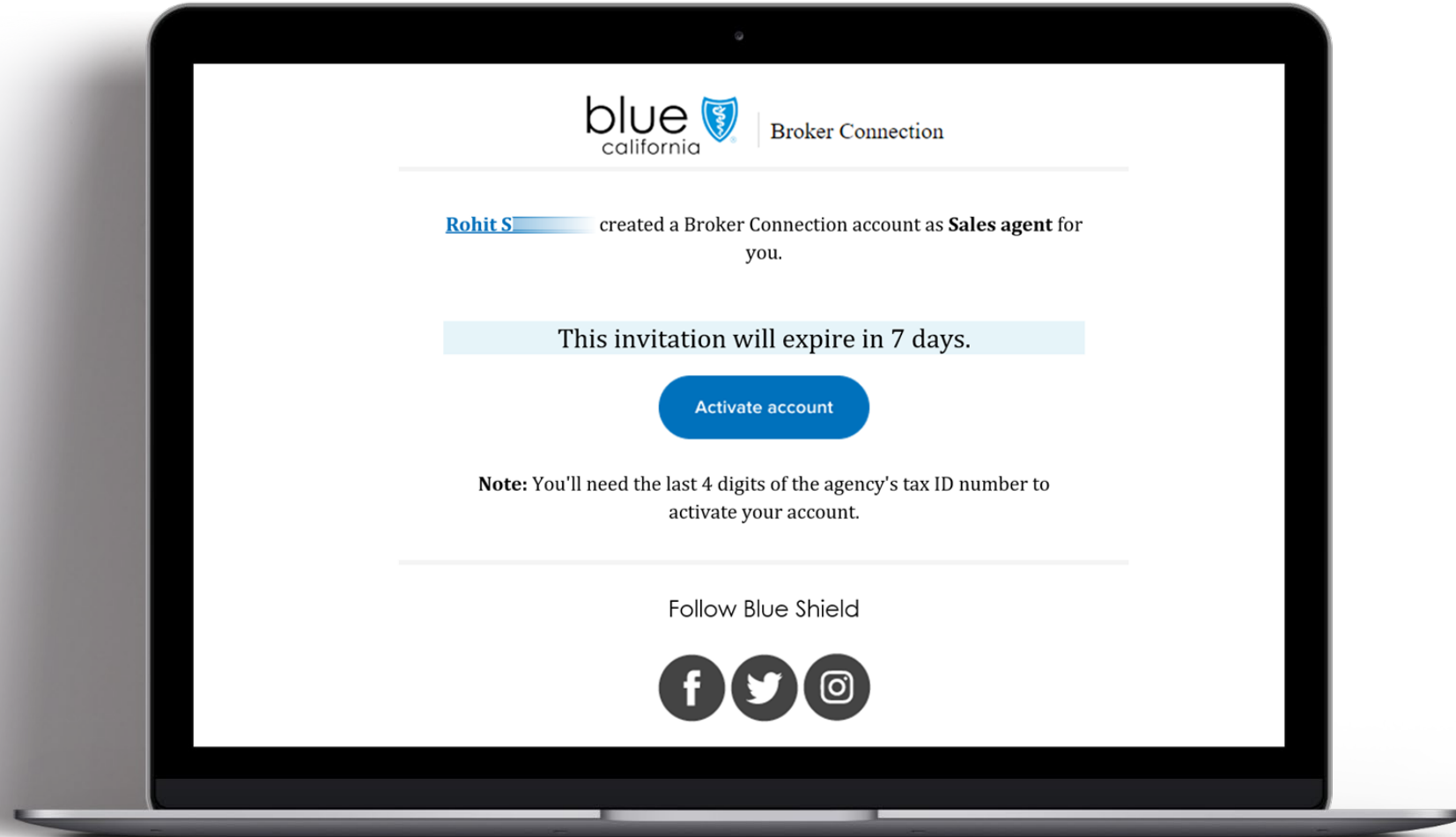
8

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



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.



Role-based Permissions

User account functionality is determined by role-based permissions and easily set or changed anytime by your designated primary agent for the agency.

Accepting an invitation and merging accounts



Broker Connection

Rohit S

 created a Broker Connection account as **Sales agent** for you.




This invitation will expire in 7 days.

Activate account

1

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

Follow Blue Shield



Invite

In the prior section, a new user was invited to create a Broker Connection.

The new user received their invite email.


1. 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 will need the last 4 digits of the agency's tax ID number to activate your account.

Register for Broker Connection

 broker connection

Individual & Family Medicare Small Business Large Groups Resources

Search

Login or Register


2


WELCOME TO

Broker Connection

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

Log in to your account





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 appointed >](#)

Registration Steps

- After clicking on the Activate Account button in the email, you will be taken to the Broker Connection home page.
- Click the **Log In or Register** button.



Register for Broker Connection

 > Welcome to Broker Connection

Welcome to Broker Connection

Log in

 Username

 Password [Show !\[\]\(5d715e70178c6920812903263284a3c8_img.jpg\)](#)

☐ Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account


A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

Register **3**

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

 This page cannot be bookmarked. See instructions for how to bookmark this page [here](#).

Feedback

Registration Steps

If you have an account already, do not log in.

You must continue with registration steps to merge and link your account with the agency.

3. Click the **Register** button.




Register for Broker Connection

Registration Steps

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.

broker connection

Individual & Family ▾ Medicare ▾ Small Business ▾ Large Groups ▾ Resources ▾

ount

1

Agency

2

Credentials

3

Contact

4

Account

5

Confirmation

6

Terms & conditions

Agency information

Enter the last 4 digits of the tax ID (TIN) for the agency.

Last 4 digits of the agency TIN

Enter

4

Register for Broker Connection

1

2

3

4

5

6

Lines of business

Tax and license

Contact

Account

Confirmation

Terms & conditions

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.

5

☐ Yes, I'll log in

☐ No, I need to create an account

Continue

< Back

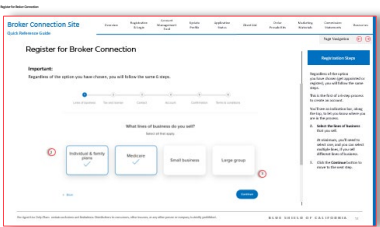
Continue

Registration Steps


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



broker connection

Individual & Family

Medicare

Small Business

Large Groups

Resources

Search Broker Connection

[Create an account](#)

✓

2

3

4

5

6

Agency

Credentials

Contact

Account

Confirmation

Terms & conditions

You already have a Broker Connection account

Log in with your existing username and password. We'll merge your current client list with the new information you just entered.

Continue

6

Registration Steps

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

 Username

 Password [Show](#) 

☐ Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Registration Steps

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



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

8

Follow Blue Shield



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

Registration Steps

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.

Site help

Get ID card

Search

blue
california

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connection

Individual & Family

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Producer

9

WELCOME,
Broker

View SOBs, SBCs, EOCs

Find a Doctor

View Pharmacy

See Commissions

Change broker of record

Select to change dashboard view

Line of business

Individual & family plans

Change

Clients

View my clients

Manage payments

Get ID card

Enrollment

Start enrollment

Check application status

Complete renewals

Get enrollment link

Key cycle

Important l

Underwriting

Special enrollment guidelines

Order materials

Brokerer Ehealth

View profile

✓ Producer

Log out



Updating Your Broker Profile

Broker Connection Site


[View Section](#)



Updating Your Broker Profile

Log In

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

 > Welcome to Broker Connection


Welcome to Broker Connection

1

Log in

Username

Password

Show 

☐ Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

Register

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

This page cannot be bookmarked. See instructions for how to bookmark this page [here.](#)

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

BLUE SHIELD OF CALIFORNIA

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Updating Your Broker Profile

Site help

Get ID card

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Resources

Producer

2

Brokerer Ehealth

View profile >

✓ Producer

Log out

WELCOME,
Broker

View SOBs, SBCs, EOCs

Find a Doctor

View Pharmacy

See Commissions

Change broker of record

Select to change dashboard view

Line of business

Individual & family plans

Change

Clients

View my clients >

Manage payments >

Get ID card >

Enrollment

Start enrollment >

Check application status >

Complete renewals >

Get enrollment link >

Key cycle

Important l

Underwriting guidelines

Special enrollment guidelines >

Order materials >

Broker Connection Home Page

2.

Click the **profile icon** (your name) at the top right of the page to access your profile information.

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BLUE SHIELD OF CALIFORNIA

59



Updating Your Broker Profile

MY PROFILE

User account

[Have more than one Broker Connection account?](#)

First name

Valued

Username

Broker_____

Last name

Broker_____

Password

Email

uuumin@mlpstage.com

Phone*

4159632900 (Mobile)

Secondary phone (optional)

NA

Default account

Broker

▼

Edit

Physical address

[Edit](#)

3

Updating your 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

Edit

Have more than one Broker Connection account?

First name

Valued

Last name

Broker

Email

uuumin@mlpstage.com

Phone type*

Office

Mobile

Phone*

4159632900

Secondary phone type (optional)

Office

Mobile

Secondary phone (optional)

Username

Must have:

8-20 characters

Numbers and letters only

No spaces

Unique Identification

Username

Broker_eHealth6

Password

Must have:

8-20 characters

At least 1 lowercase letter

At least 1 uppercase letter

A number or symbol (?#!*)

No spaces

New password

Show

Confirm new password

Show

Default account

Broker

Cancel

Save Changes

4

Updating your Profile

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

Remember

It's important to keep your information up-to-date.

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

BLUE SHIELD OF CALIFORNIA 61

Application Status

Check updates on client applications

[View Section](#)

Application Status

View Application Status

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

- 1. Select **View Application Status** from the menu.

Site help

Get ID card

Search

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Individual & Family

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Resources

Smith

MEDICARE

Compare Plans & Enroll

View Client List

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Policies & Procedures

Renewals

Training and Resources

Product Cycle Updates

Help Medicare Supplement Clients

Help MA-PD Clients

Help PDP Clients

Tools & Resources

Contact Sales and Support Offices

Select to change dashboard view

Line of business

Medicare (default)

Set as default

Clients

View my clients

Manage payments

Get ID card

Enrollment

Start enrollment

Medicare Submitted Applications

Key cycle

Important Medicare cycle

Underwriting guidelines

Medicare certification


Order materials

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

BLUE SHIELD OF CALIFORNIA 63



Application Status

2  Hide Filters

Application ID

Last name

First name

Medicare ID number

National producer number

Submitted
Within last 6 months

Clear



Search

Results Per Page

15

Showing 1-15 of 784 applications

[Data Update Details](#)

Confirmation #	Name ↕	Plan name	Status
340683	Randall	HMO Plan 23	 Submitted to CMS for approval
340655	Clare	HMO Plan 23, Dental	 Request to cancel was received

View Application Status

The page displays all available applications and the following information for each:

- Name
- Application status
- Plan name
- Confirmation number

2. Click the **Hide Filter Link** to close the search options.



Application Status

Register

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

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

Hide Filters

Application ID

Last name

First name

Medicare ID number

National producer number

Submitted
Within last 6 months

Clear

Search

3

Results Per Page
15

Showing 1-15 of 784 applications

[Data Update Details](#)

Confirmation #	Name ↕	Plan name	Status
340683	Randall	HMO Plan 23	Submitted to CMS for approval
340655	Clare	HMO Plan 23, Dental	Request to cancel was received

Application Status

View Application Status

- The search results are returned.
- Each result displays the applicant's:
- Confirmation number
 - Name
 - Plan name
 - Application status

4. To view more results on a page, click the Results Per Page drop-down menu and select a option from the list.
5. To view details, click the **Confirmation Number link**.
6. If there are many results, you may have several pages. To move between pages, click the on the page number to view additional results.

Show filters

4

Results Per Page
15

Showing 1-15 of 784 applications

[Data Update Details](#)

Confirmation #	Name ↕	Plan name	Status
5 340683	Randall	HMO Plan 23	Submitted to CMS for approval
340655	Clare	HMO Plan 23, Dental	Request to cancel was received
340581	Peter	Medicare Advantage Plan 24	Submitted to CMS for approval

Applications data last refreshed 05/12/2025 at 1:30 P.M.

6

1 2 3 4 ... 53 →

Showing results 1-15 of 784



Application Status

APPLICATION DETAILS

Confirmation #: 34030C Medicare ID: 7XU9YF2W Tax ID: -

⊗ Please contact our Support team

Coverage info

Plan name: PPO Plan 1
Plan type: MAPD
Specialty plans: -
Coverage start date: 05/01/2025
Submitted: 04/10/2025

Subscriber info

Name: SUNG
DOB: 02/05/1954
Email: @YAHOO.COM

Producer Details

Producer Name: -
Producer Id: -
NPN: -
Agency Name: -
Super Producer Id: ****078
Application Source:

← Back

View Application Status

Additional details are shown including:

- Application Details
- Medicare ID
- Coverage Information
- Subscriber Information
- Producer of record

Note:

Information about the status is displayed at the top of the page.

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



Application Status

Status Options

Here are the different status options that will be displayed and the text you will see when hovering over the status.

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



Application Status, Continued

Status Options

Here are the different status options that will be displayed and the text you will see when hovering over the status.

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



Prospect Application Status Site

Medicare plan application status

[Data Update Details](#)

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

First Name *


Last Name *

Date Of Birth *

Medicare ID Number *

Confirmation Number/Application ID

☐ I'm not a robot

 reCAPTCHA
Privacy - Terms

Clear

Search

Contact Us



Producer Services (800) 559-5905
Employer Services (800) 325-5166



Blue Shield of California
PO Box 272540
Chico, CA 95927-2540

Quick Links

About Blue Shield
Contact Us
News
Careers

Send Feedback
Terms of Use
Privacy
Sitemap

Get Social



Cobrowse



Prospect Application Status

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

Highlights

The Client List displays your prior and newly enrolled clients.

Please note that 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.

Client List

Site help

Get ID card

Search

blue CALIFORNIA

broker connection

Individual & Family

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MEDICARE

1

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Training and Resources

Product Cycle Updates

Help Medicare Supplement Clients

Help MA-PD Clients

Help PDP Clients

Tools & Resources

Contact Sales and Support Offices

Select to change dashboard view

Line of business

Medicare (default)

Set as default

Clients

View my clients

Manage payments

Get ID card

Enrollment

Start enrollment

Medicare Submitted Applications

Key cycle

Important Medicare cycle

Underwriting guidelines

Medicare certification

Order materials

Main Menu

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

[Data Update Details](#)

[Payment FAQ](#)

Individual & family

Medicare

Small Business

Hide Filters

Enter search criteria or select a filter here to view specific subscriber results.*

Subscriber First Name

Subscriber Last Name

Subscriber Plan Type

Medicare Supplement Plans

Subscriber ID

Subscriber Payment Status

View all

Payment Due Date

View all

Sort By

Default

2

Search

Clear form

Showing results 1 - 10 of 163



[Download client list](#)

of records 10

[Expand All](#)

Payment status ⓘ

Name

Subscriber ID

Plan

ID card ⓘ

Manage payments ⓘ

Last Payment Received



Agent Offline

Viewing Your 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

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

Note:

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



Client List

[Data Update Details](#)

[Payment FAQ](#)

Showing results 1 - 10 of 228 [Download client list](#)

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card	Manage payments	Last Payment Received
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80

Get ID Cards

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 instruction to download via the Member Portal.

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

Client List

Get ID Cards

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.

Example:

A PDF of the ID will be downloaded
for printing.

Client List

Get ID Cards

Or you can select Send ID card by email and an email form will display with the client’s email address prepopulated.

Please note, for security reasons, you can’t change the email address.

6. **Add** any additional information to the body of the email and **click send**.

Showing results 1 - 10 of 228

Download client list

Show Filters

of records 10

Expand All

Payment status	Name	Subscription ID	Last Payment Received
CURRENT	HEATH	980336	\$2.00
CURRENT	FRIDAY	980336	\$2.00
LATE	RAMIRO	703500	\$610.00
LATE	SACHIN	980336	\$568.35
LATE	DHONI	980336	\$568.35
LATE	JASON	980336	\$117.80
LATE	KEIRON	980336	\$117.80

«

«

1

2

3

4

5

...

23

»

»»

Send ID card

6

To:

test23@bsc23.com

Subject:

Receive Blue Shield ID card(s)

Dhoni Singh,

We have attached your Blue Shield of California ID card as a PDF. It also includes cards for your dependents, if any.

If you need anything else, please don't hesitate to reach out to my office.

Thank you for your business.

PDF

60366236_ID_Card.pdf

(63 KB)

< Back

Send

Client List

Get ID Cards

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.

Showing results 1 - 10 of 228

Download client list

Send member instructions

7

To:
test23@bsc23.com

Subject:
Receive Blue Shield ID card(s)

Dhoni Singh,

You can use the information below to schedule services with your provider.

Member ID: 98033608
Group #: W00517

To receive your Blue Shield ID card(s):

1. Log in to the Blue Shield Member website.
2. Go to the profile menu and select 'ID card'.
3. Download your Blue Shield of California ID card(s). It also includes cards for your dependents, if any.

If you need anything else, please don't hesitate to reach out to my office.

Thank you for your business.

< Back

Send

Show Filters

of records 10 Expand All

Payment status	Name	Subscription	Last Payment Received
CURRENT	HEATH	980336	\$2.00
CURRENT	FRIDAY	980336	\$2.00
LATE	RAMIRO	703500	\$610.00
LATE	SACHIN	980336	\$568.35
LATE	DHONI	980336	\$568.35
LATE	JASON	980336	\$117.80
LATE	KEIRON	980336	\$117.80
CURRENT	JOSEPH	703500	\$636.00

<<< 1 2 3 4 5 ... 23 >>>

Client List

[Data Update Details](#)

[Payment FAQ](#)

Showing results 1 - 10 of 228 [Download client list](#)

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⓘ	Manage payments ⓘ	Last Payment Received
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80

[««](#) [«](#) **1** [2](#) [3](#) [4](#) [5](#) [...](#) [23](#) [»](#) [»»](#)

Manage Payments

Manage Payments allows you to set up a monthly autopay or make a one-time payment.

8. Click **Set up autopay or make a payment** to view options for your client.

Client List

Manage Payments

You will have two options:

- Set up autopay
- Make a payment

Example 1:

For this example, we will walk you through the steps of setting up an autopay for your client.

9. Select **Set up autopay** and click **Continue**.

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Subse
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
LATE	RAMIRO	7035
CURRENT	DAVIN	7035001

1 Manage

2 Method

3 Confirmation

Manage payments

Select a payment option

☒ Set up autopay

☐ Make a payment

9

Cancel

Continue

Terms and conditions

Show Filters

of records 10

Expand All

Last Payment Received

\$2.00	▼
\$2.00	▼
\$610.00	▼
Statement	
\$34.80	▼

Client List

Manage Payments

10. Next, select the payment method from the drop-down list:
- Credit or debit card
 - Checking account
 - Saving account
- Click **Submit** to go the next step.

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Subs
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
CURRENT	DAVIN	703500

Blue Shield Coordinated Choice Plan (HMO)

Get ID card

Set up autopay or Make a payment

\$34.80

10

Set up autopay

Select the payment method that you want to link to this account.

Payment method

Back

Submit

Client List

Manage Payments

11. Complete the Set-up autopay form:

- Select payment method from the drop-down menu
- Complete the banking information including:
 - Name on the Account
 - Account Number
 - Routing Number
- Member email address

Click **Submit** to go the next step.

Client List

Individual & familyMedicare

Showing results 1 - 10 of 228Download client list

Payment status	Name	Sub
CURRENT	HEATH	980
CURRENT	FRIDAY	980
LATE	RAMIRO	703
LATE	SACHIN	980
LATE	DHONI	980
LATE	JASON	980
CURRENT	DAVIN	703

11

Set up autopay

Choose a payment method for Deborah Newhouse.

Payment method option
Checking/Savings account

First name
Friday

Last name
Broker

Routing number
000123456

Account number
0000123456789

Checking or savings account
Checking

Personal or business account
Personal

Member email
FridayM@email.com

BackSubmit

Show Filters

of records10Expand All

Last Payment Received
\$2.00
\$2.00
\$610.00 Statement
\$568.35
\$568.35
\$117.80
\$34.80

Client List

Manage Payments

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Subs
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
CURRENT	DAVIN	703500

Autopay has been successfully added for Friday Morning

Your next payment will be on 09/30/2025 You will be billed every last day of the month.

Print as PDF

Close

of records

10

Expand All

Last Payment Received

\$2.00

\$2.00

\$34.80

Get ID card

Set up autopay or Make a payment

12. A confirmation screen will display.
- You have the option to print the confirmation as a PDF.
- Click **Close** to exit out of the payment set-up and return to the main Client List screen.



Client List

[Data Update Details](#)

[? Payment FAQ](#)

Showing results 1 - 10 of 228 [Download client list](#)

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⓘ	Manage payments ⓘ	Last Payment Received	
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00	▼
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00	▼
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement	▼
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35	▼
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00	▼
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80	▼

Manage Payments

Example 2:

Manage Payments allows you to set up a monthly autopay or make a one-time payment.

13. Click **Set up autopay or make a payment** to view options for your client.

Client List

Manage Payments

You will have two options:

- Set up autopay
- Make a payment

For this example, we will walk you through the steps of making a payment for your client.

14. Select **Make Payment** and click **Continue**.

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Subs
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
LATE	RAMIRO	7035
CURRENT	DAVIN	703500

14

Manage payments

Select a payment option

☐ Set up autopay

☒ Make a payment

CancelContinue

Terms and conditions

Show Filters

of records10

Expand All

Last Payment Received
\$2.00
\$2.00
\$610.00
Statement
\$34.80

Client List

Manage Payments

15. Choose an amount to be paid:
- Current balance
 - Enter a custom amount
- Click **Continue** to go to the next step.

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Subs
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
LATE	RAMIRO	7035
CURRENT	DAVIN	7035001

AutoPay: ON

1

Manage

2

Payment

3

Method

4

Review

5

Confirmation

Make a payment

Choose an amount to be paid. This payment will be made on 09/23/2025

Current balance: \$0.00

Enter custom amount

\$2.00

< Back

Continue

of records

10

Expand All

Last Payment Received

\$2.00

▼

\$2.00

▼

\$610.00

▼

Statement

▼

\$34.80

▼

Client List

Manage Payments

16. Select the payment method:
- Account shown
 - Or add a new payment method
- Enter the **members email** and click **Continue**.

Client List

Individual & family Medicare

Showing results 1 - 10 of 228 [Download client list](#)

Payment status	Name	Subs
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
LATE	RAMIRO	7035
LATE	SACHIN	9803
CURRENT	DAVIN	703500192

16

Make a payment

Choose your payment method. This payment will be made on 09/23/2025

Amount

Custom amount: \$2.00 [Edit](#)

☐ Checking ****6789

Member email

FridayM@email.com

Add new payment

Continue

Show Filters

of records 10 [Expand All](#)

Last Payment Received
\$2.00
\$2.00
\$610.00 Statement
\$568.35
\$34.80



Client List

Manage Payments

17. Review the payment details and click **Submit** to make the payment.

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Subs
CURRENT	HEATH	9803
CURRENT	FRIDAY	9803
LATE	RAMIRO	7035
CURRENT	DAVIN	703500192

Manage

Payment

Method

Review

Confirmation

Make a payment

This payment will be made on 09/23/2025

Review payment

Amount

Custom amount: \$2.00

Payment method

Checking ****6789

Member email

fridaym@email.com

< Back

Submit

Show Filters

of records

10

Expand All

Last Payment Received
\$2.00
\$2.00
\$610.00
Statement
\$34.80

Client List

Manage Payments

3. Click **Close** to dismiss the pop-up window and return to the main Client List screen.

Client List

Individual & family

Medicare

Showing results 1 - 10 of 228

Download client list

Payment status	Name	Sub
CURRENT	HEATH	980
CURRENT	JOSEPH	703
CANCELLED	LAZARUS	703
CURRENT	DAVIN	703

Manage

Paym

Review

Confirmation

Payment has been successfully completed

Confirmation details

Client name

Zackery Dalton

Subscriber ID

910032650

Member email

zackery60319513@pod5auto
mation.com

Payment method

Star ****0011

Autopay

Off

Custom amount

\$22.00

Confirmation number

1009187649

Payment date

09/23/2025

Processing time

1-2 business days

Print as PDF

Close

Show Filters

of records

10

Expand All

Last Payment Received

\$2.00

\$636.00

Statement

\$120.00

\$34.80

18

Client List

[Data Update Details](#)

[Payment FAQ](#)

Showing results 1 - 10 of 228 [Download client list](#)

19

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card <i>i</i>	Manage payments <i>i</i>	Last Payment Received	
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00	▼
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00	▼
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement	▼
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35	▼
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00	▼
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80	▼

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.



Client List

Client List

Individual & family

Medicare

Small Business

[Data Update Details](#)
[Payment FAQ](#)

Show Filters

LATE

TERRY

980335

Blue Shield Inspire (HMO)

Get ID card

Set up autopay or Make a payment

\$120.00

21

Subscriber Information

Client Information

Plan information

Additional Products

Rate Section

Additional Billing Info

Members on policy

Subscriber Name:
TERRY

Plan renewal date:
01/01/2026

Dental Plan
N/A

Subscriber Rate Change:
N/A

Payment due date:
04/01/2025

Household Savings
N/A

Address
37 HUGHES AVE

Cancellation date:
N/A

Rate Change date:
N/A

Bill Type
Direct Bill

Payment history
[View](#)

Phone
(445) 254

Original enrollment date:
N/A

Rate notification date:
N/A

Bill Frequency:
Monthly

DOB
01/01/19

Application id
T93216287990

Rate region
N/A

Member registered email
N/A

Application email
N/A

National producer ID
N/A

Payment status ⓘ

Name

Subscriber ID ⓘ

ID card ⓘ

Manage payments ⓘ

Last Payment Received

LATE

RUSELL

980335

Blue Shield Inspire (HMO)

Get ID card

Set up autopay or Make a payment

\$120.00

Viewing Your Client Details

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

Site help

Get ID card

Search



broker
connection

Individual & Family

1

Medicare

Small Business

Large Groups

Resources



Smith

MEDICARE

Compare Plans & Enroll

View Client List

Medicare Submitted Applications

News & FAQs

Sales and Marketing Collateral

2

Enrollment Materials

Medicare Eligible Home

Products

MA-PD/PDP Certification

Policies & Procedures

Renewals

Training and Resources

Product Cycle Updates

Help Medicare Supplement Clients

Help MA-PD Clients

Help PDP Clients

Tools & Resources

Contact Sales and Support Offices

Select to change dashboard view

Line of business

Medicare (default)



Set as default

Clients

View my clients

Manage payments

Get ID card

Enrollment

Start enrollment

Medicare Submitted Applications

Key cycle

Important Medicare cycle

Underwriting guidelines

Medicare certification

Order materials

Ordering Steps

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

Order presale kits

blue shield of california



4

BSC MAPD

5

Alameda

Kern

Los Angeles

Merced

Orange

Riverside

San Bernardino

San Diego

San Joaquin

San Luis Obispo

San Mateo

Santa Barbara

Santa Clara

Stanislaus

BSC PDP

BSC MEDSUPP

BSC OTHER

BSC IFP

Welcome,

Welcome to the newly designed DIGITAL ONLY Blue Shield of California storefront.

Here you will order Medicare materials for the Medicare Annual Enrollment Period.

To place an order for **Presale Materials**, please select the product line in the upper left hand corner for which you would like to order materials.

Order received by 10 a.m. will process same day and ship within 2-3 days.

Order received after 10 a.m. will process next day.

Note:

If you need to place an order with a lower quantity that is offered as an option, please contact your Regional Sales Manager.

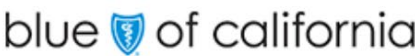
Ordering Steps

- 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



Ordering Steps

- 6. Select the type of materials you want to order.
- 7. Click the **Order** button.

▼ BSC MAPD

– Alameda

● Kern

– Los Angeles

– Merced

– Orange

– Riverside

– San Bernardino

– San Diego

– San Joaquin

– San Luis Obispo

– San Mateo

– Santa Barbara

– Santa Clara

– Stanislaus

▶ BSC PDP

▶ BSC MEDSUPP

▶ BSC OTHER

▶ BSC IFP

Welcome,

kern

6 ▼ presale kit

blue

Embrace your journey


Explore blueshieldcalifornia.com/medicare for more information


7

+ Order

Kern-65 Plus (HMO)

Order presale kits

blue  of california



▼ BSC MAPD

– Alameda

● Kern

– Los Angeles

– Merced

– Orange

– Riverside

– San Bernardino

– San Diego

– San Joaquin

– San Luis Obispo

– San Mateo

– Santa Barbara

– Santa Clara

– Stanislaus

▶ BSC PDP

▶ BSC MEDSUPP


▶ BSC OTHER


▶ BSC IFP

Welcome,


kern


▼ presale kit


Embrace
your journey
Explore blueshieldca.com/malware
for more information



Kern-65 Plus (HMO)

English 5  8

Spanish 15 

+ Add to Cart 9

Ordering Steps

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.

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

BLUE SHIELD OF CALIFORNIA96

Order presale kits

blue shield of california



10

- ▼ BSC MAPD
 - Alameda
 - Kern
 - Los Angeles
 - Merced
 - Orange
 - Riverside
 - San Bernardino
 - San Diego
 - San Joaquin
 - San Luis Obispo
 - San Mateo
 - Santa Barbara
 - Santa Clara
 - Stanislaus
- ▶ BSC PDP
- ▶ BSC MEDSUPP
- ▶ BSC OTHER
- ▶ BSC IFP

Welcome, James Joseph

your order

Please review your order. The shipping address defaults to the address in your user profile (change this with the "Edit Profile" feature). To ship this order to a different address simply enter it in the fields below.

Once your order items and delivery address are confirmed click "Place Order".

Orders received by 10 a.m. (PST) will process same day and ship within 2-3 days.

Orders received after 10 a.m. will process next day.

order information

Year	Item	Description	Language	Qty	
2025	Kern-65 Plus (HMO)	Kern	English	5	
2025	Kern-65 Plus (HMO)	Kern	Spanish	15	

Your order is 8.5 lbs. If you wish to place this order click on the Place Order button below.

shipping information

11

Name

Attention

Street 1

Street 2

City State Zip

Phone

12



← Continue Shopping

13

Click here to Place Order

Ordering Steps

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

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blue CALIFORNIA

broker connection

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MEDICARE

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Select to change dashboard view

Line of business

Medicare (default)

Set as default

Clients

View my clients

Manage payments

Get ID card

Enrollment

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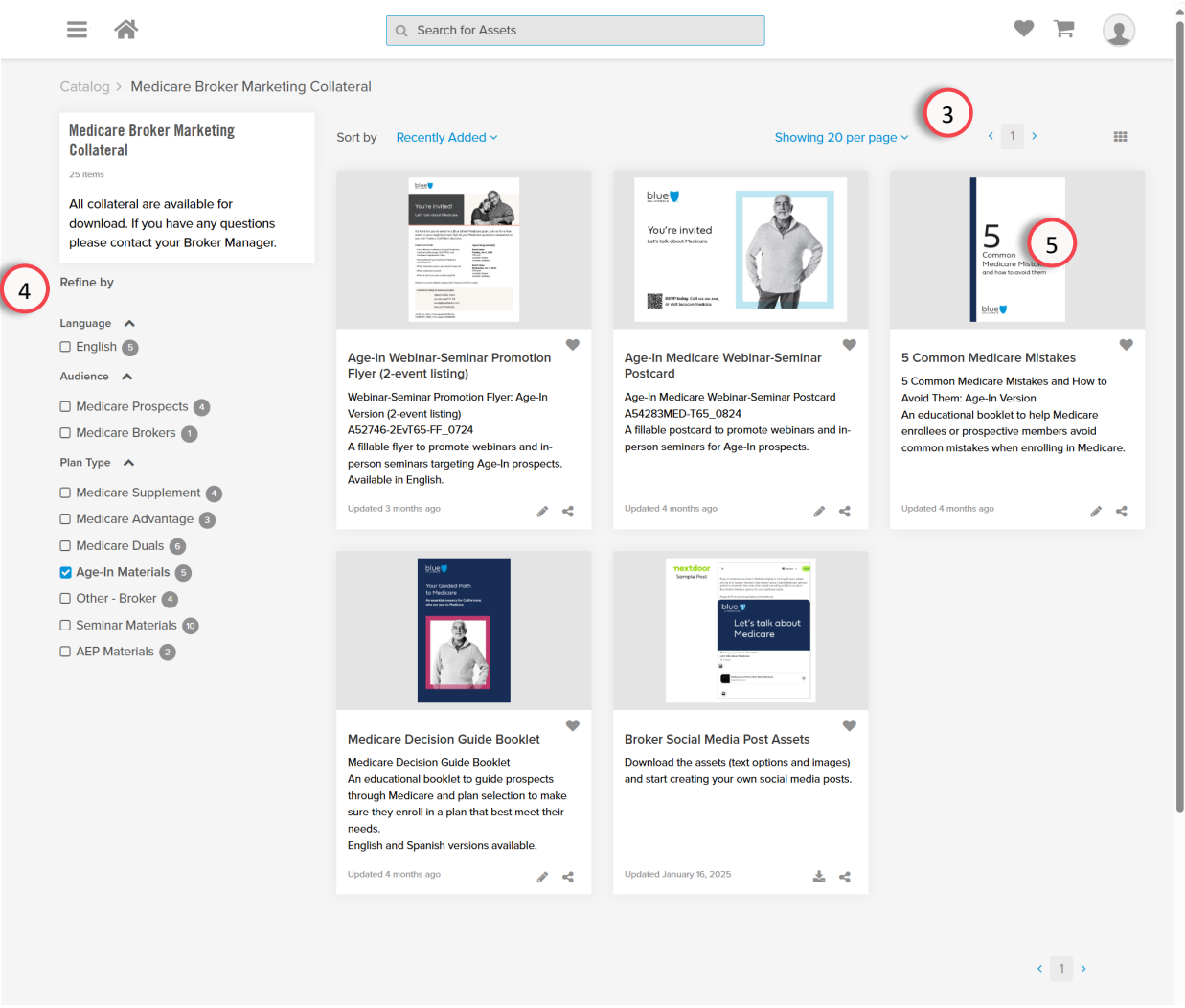
Order materials

Ordering Steps

1. Click the **Medicare** tab at the top of the page.
2. Select **Sales and Marketing Collateral** from the list.



Advertising Materials



Ordering Steps

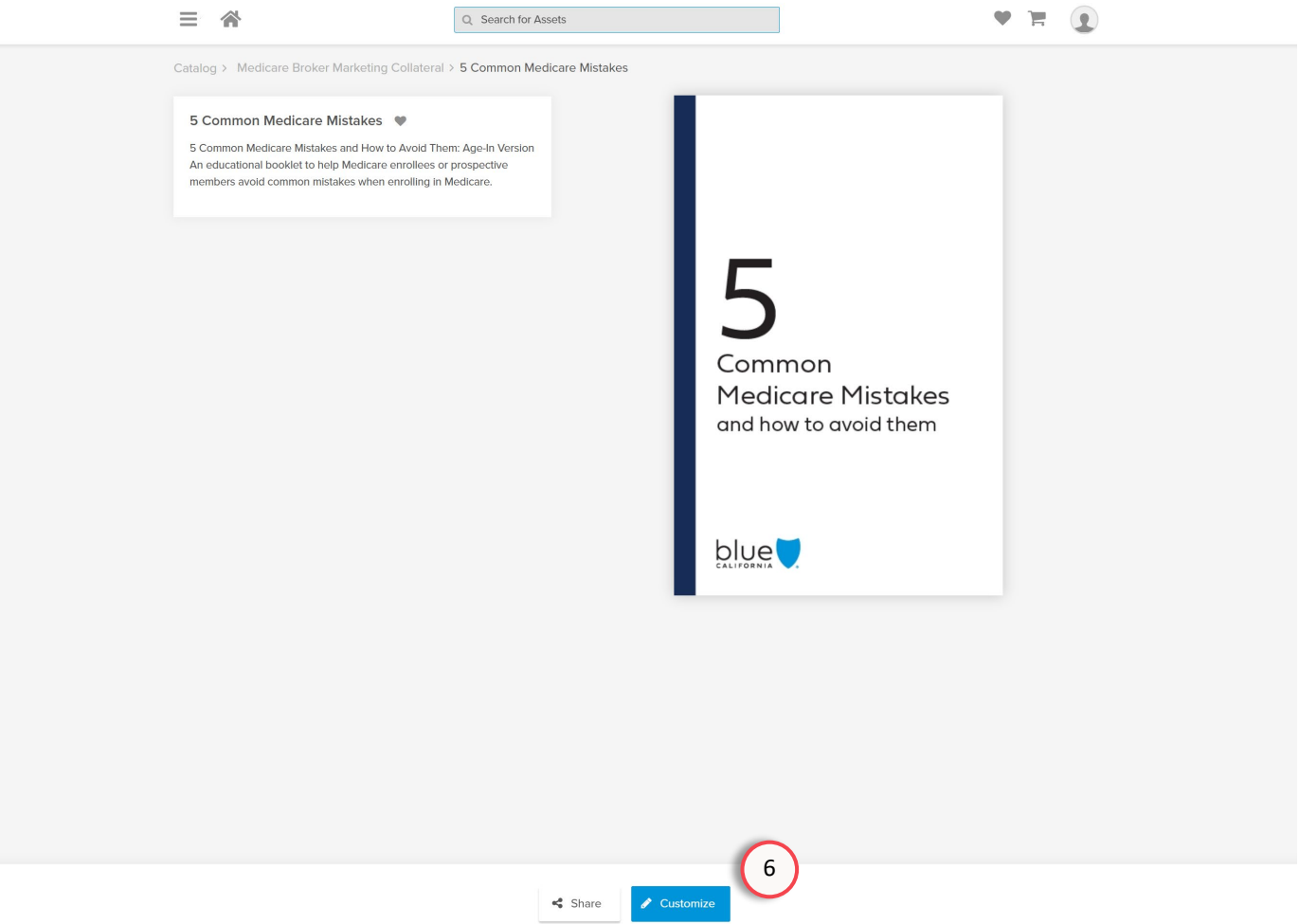
- 3. Navigate between pages using the **forward and back** buttons.
- 4. Filter the catalog by **selecting one or more options from the left panel**.
- 5. To select marketing collateral, **click on the item**.

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



Ordering Steps

- A preview of the marketing collateral is displayed.
6. Click the **Customize** button to add your personalized contact information.

Advertising Materials

Customize >

5 Common Medicare Mistakes

5 Common Medicare Mistakes and How to Avoid Them:
Age-In Version
An educational booklet to help Medicare enrollees or prospective members avoid common mistakes when enrolling in Medicare.

7

Broker/Agent First Name*

Broker/Agent Last Name*

License

Phone Number

TTY text

Operating Hours

X a.m. to X p.m., Monday through Friday

Agent url/email

Hablamos Español

None Selected...

Cancel

Preview

8

5

Common Medicare Mistakes and how to avoid them

blue CALIFORNIA

Ordering Steps

7. Enter your **information**.
8. Click the **Preview** button to continue to the next screen.



Advertising Materials

Customize >

5 Common Medicare Mistakes

5 Common Medicare Mistakes and How to Avoid Them:
Age-In Version
An educational booklet to help Medicare enrollees or prospective members avoid common mistakes when enrolling in Medicare.

Broker/Agent First Name*

Broker

Broker/Agent Last Name*

Agent

License

Phone Number

TTY text

Operating Hours

X a.m. to X p.m., Monday through Friday

Agent url/email

BrokerAgent@email.com

Hablamos Español

Yes

Blue Shield Medicare Advisers are standing by to answer your questions and help you choose the right plan for your unique healthcare needs.

Broker Agent
X a.m. to X p.m., Monday through Friday
BrokerAgent@email.com
Hablamos Español

14

Cancel

Done

View

Page

<

>

15

of 16

Zoom

-

+

100%

Ordering Steps

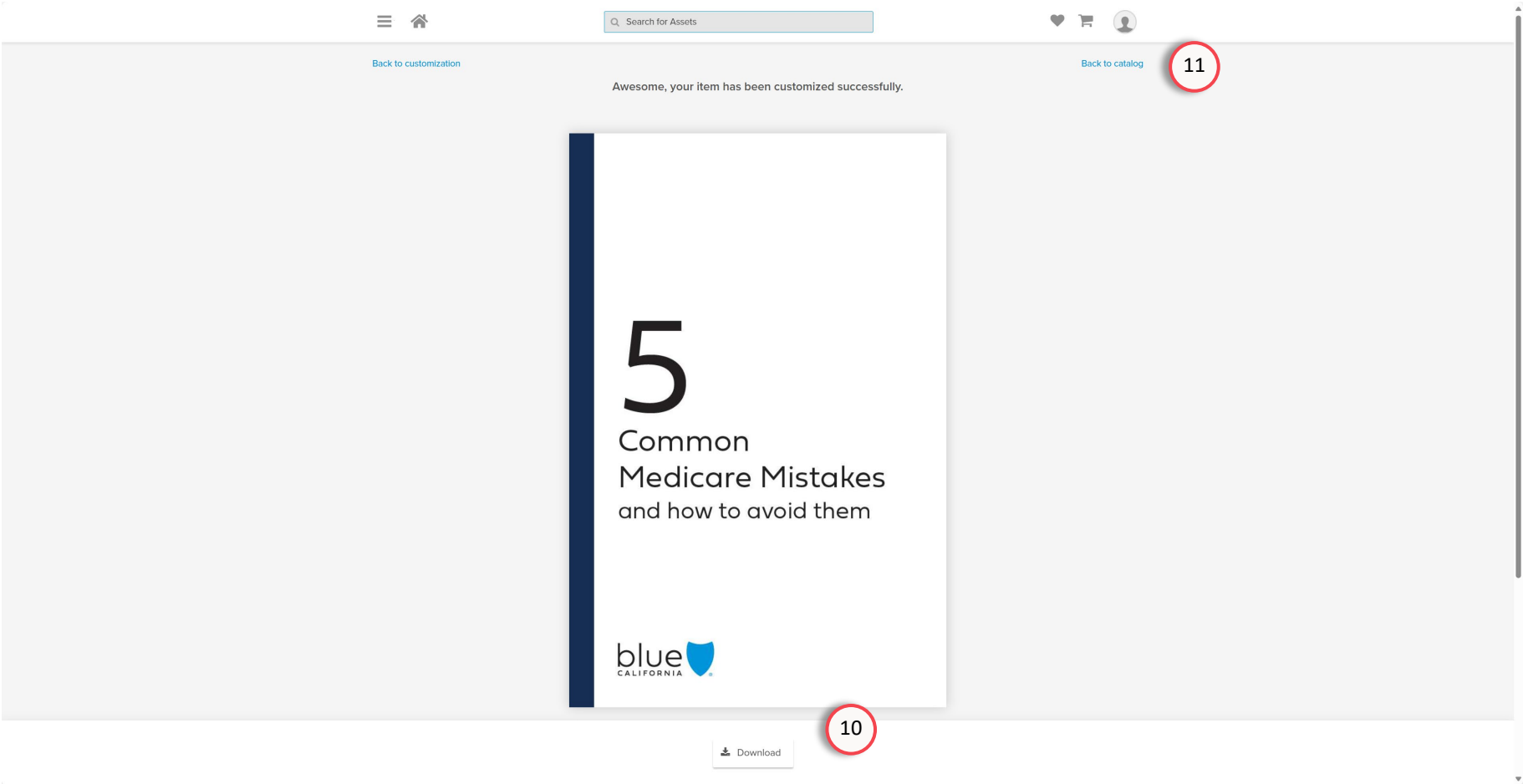
9. To complete the customization and exit the screen, click the **Done** button.



Advertising Materials

Ordering Steps

- 10. Click the **Download** button save and print your marketing collateral.
- 11. To return to the main screen, click the **Back to Catalog** link at the top right of screen.





Commission Statements

Broker Connection Site

[View Section](#)



New Commission Statements

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RESOURCES

1

Broker Compensation

Advertising & Marketing Resources

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Update Your Profile

Direct Deposit

Manage your accounts

Rewards & Commissions

Mandates Information

Personalize Your Website

Email Producer Services

Broker Communications

Broker of Record Change

Quick Links for Brokers

Tools & Resources

Find a Doctor

Pharmacy

Health & Wellness

Contact Us

Be a Blue Shield of CA Broker

Select to change dashboard view

Line of business

Medicare (default)

Set as default

Clients

View my clients

Manage payments

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Medicare Submitted Applications

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Order materials

Accessing Commission Statements

Under **Resources**, you can access your commission statements.

- 1. Click **Broker Compensation**



Check Out All The Features...

Overview

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.

blue shield of california

Blue Shield of California

An Independent Member of the Blue Shield Association

2

Hello,

3

History

4

Statements

BSC - Commission Detail

Promise - Commission Detail

Statements

<input type="checkbox"/>	Process Year	Process Month	Pay Entity ID	Pay Entity Name	Payout Type Id	Date To	
<input type="checkbox"/>	2025	4	00255	CSQHH	Commercial Payout	05/072025	Statement
<input type="checkbox"/>	2025	3	00255	CSQHH	Commercial Payout	04/072025	Statement
<input type="checkbox"/>	2025	3	00255	CSQHH	BON-ManualAdjust...	03/072025	Statement
<input type="checkbox"/>	2025	2	00255	CSQHH	Commercial Payout	03/072025	Statement

Advanced Search

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.

2. **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.
3. **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.
4. **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.



New Commission Statements (Broker Only Statement)

Viewing
Detail Page

Smith Insurance Company Inc
Bill Smith
Producer ID # 0012
Producer NPN # 123456789

Commission Statement

Blue Shield of California

Medicare Supplement Commissions

Writing Producer 00123456789		Smith Insurance Company, Bill Smith						NPN 123456789	
Group Number	Subscriber ID	Customer Name	Product	Effective Date	Period	Gross Premium	Base Premium	Commission Rate	Commission Paid
X000	9091	Clark, George	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
X000	9091	Bill, Marks	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
X000	9091	Sam, Hill	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
X000	9091	Jane, Smith	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
								Total	\$239.20

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.

Viewing Commission Detail

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.).

- 5. Enter the year and month where dues were received (08/2016 earliest).
- 6. Click Run Report.
- 7. To export the information, click the **Save** button.
- 8. 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.

blue shield of california

Blue Shield of California
An Independent member of the Blue Shield Association

Hello,

History

Statements

BSC - Commission Detail

Promise - Commission Detail

BSC - Commission Detail

Enter monthend period (YYYYMM): 201608

5

6

Run Report

Clear Parameters

7

Save

Process_Month	Business_Type	Broker_ID	Broker_Name	Broker_NPN	Payee_ID	Payee_Name
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L

Save

Your requested report has the following "Save as" options. Please tap one of the available items to save in that format.

CSV

CSV (Comma-separated values)
Use this format to create comma separated files, *.CSV. This format is widely adopted by many software programs, and is commonly viewed with Excel or Notepad.

XLS

XLS (Microsoft Excel)
Use this format to create a Microsoft Excel file, *.XLS. This format is commonly opened with Microsoft Excel. If the values in this format are not properly formatted, try the *.CSV option instead.

New Window

View content in new window

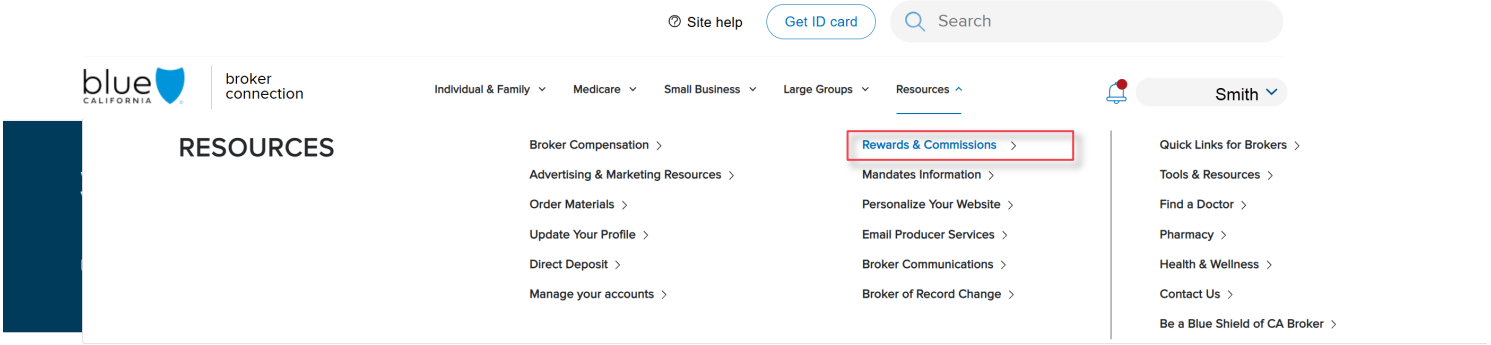
8

Cancel

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Commission Schedule



Accessing the Commission Schedule

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.

Rewards and commissions

We offer our brokers competitive commissions and special bonuses from our various lines of business. Check out our bonus program and commission schedules that are currently available and watch for new bonus programs coming soon.

Direct deposit

[Sign up for direct deposit](#) to have your commissions automatically deposited into your checking account. When you sign up for direct deposit as a Primary Agent of your Agency, your commissions and bonuses will be deposited into your account automatically, meaning less trips to the bank for you.

Producer agreement and commission schedule updates

2025

[FAQs for 2025 Commission Schedule updates](#) (PDF, 62 KB)

[2025 Broker Payout Calendar](#) (PDF, 49 KB)

[2025 Commission Schedule for IFP plans, Small Business plans, and plans for Medicare beneficiaries](#) (PDF, 1 MB)

[2025 Producer Agreement](#) (PDF, 8 MB)

Resources

Broker Connection Site

[View Section](#)



Resources

- Broker Connection Site: <https://www.blueshieldca.com/en/broker>
- Consumer Application Status Site: <https://www.blueshieldca.com/bwa/unauth/medicareProspectAppStatus>

Broker Connection Site Footer

Contact Us

Blue Shield Producer Services
Phone Number:

1-800-559-5905

Email:
seniormarketsproducer@blueshieldca.com

Contact us – Phone

Producer Services (800) 559-5905

Employer Services (800) 325-5166

Contact us – Mail

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