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Oklahoma • Texas

Electronic Recontracting

AN AGENCY AND PRODUCER GUIDE & FAQs

**The manual on the electronic recontracting
process via Sircon's Producer Express
*from Producer Services and Administration***

Blue Cross and Blue Shield of Illinois,
Blue Cross and Blue Shield of Montana,
Blue Cross and Blue Shield of New Mexico,
Blue Cross and Blue Shield of Oklahoma, and
Blue Cross and Blue Shield of Texas,

Divisions of Health Care Service Corporation, a Mutual Legal Reserve Company,
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Recontracting Initiative

Blue Cross and Blue Shield of Illinois, Montana, New Mexico, Oklahoma and Texas are implementing an electronic recontracting process for agencies and producers to save time and costs associated with paper forms, hard copy mailings and file maintenance. The consolidation of our contracts into one document allows us to serve our producers more efficiently and consistently across all the divisions.

The main tool we'll be utilizing for electronic recontracting is called Producer Express, a Web-based software application designed to help with managing the agency and producer relationship. It automates recruiting, onboarding, contracting, recontracting and maintenance processes. It is owned by Sircon Corporation*, which is a subsidiary of Vertafore, Inc.*

This manual details the steps required to complete the digital recontracting process in Producer Express. At the end of the manual are Frequently Asked Questions. Be sure to follow all instructions, read all FAQs and pay special attention to the Notes and Warnings like those shown below.



Note: Paragraphs in purple offer suggestions and tips to improve your Producer Express experience.



Warning: Paragraphs in orange like this one advise caution or provide critical information.

If you have any questions about the recontracting process, please contact the Producer Service Center.

Call 855-782-4272, Monday through Friday, 8 a.m. to 5 p.m., CT
Fax 918-549-3039
Mail Health Care Service Corporation
 Producer Service Center
 P.O. Box 60545
 Oklahoma City OK 73146

* The relationship between Vertafore, Inc., and its subsidiary, Sircon Corporation, and Blue Cross and Blue Shield of Illinois, Blue Cross and Blue Shield of Montana, Blue Cross and Blue Shield of New Mexico, Blue Cross and Blue Shield of Oklahoma and Blue Cross and Blue Shield of Texas is that of independent contractor.

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Microsoft, Windows, Excel and Internet Explorer are registered trademarks of Microsoft Corporation.
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Mozilla and Firefox are registered trademarks of Mozilla Foundation.
Google Chrome is a trademark of Google Inc.
Opera is a trademark of Opera Software ASA.

System Requirements and Compatibility

Internet Browser Compatibility

Producer Express is a Web-hosted application. You will need Internet access to complete the recontracting process. Producer Express is compatible with three Internet browser applications: Microsoft's Internet Explorer, Google's Chrome and Mozilla's Firefox. If you use Apple Safari, Opera or another Internet browser application, you may experience compatibility issues. Internet Explorer, Chrome and Firefox are free Internet browsers. To download one of these applications, please visit their respective websites:

- Internet Explorer: <http://www.microsoft.com/windows/internet-explorer/default.aspx>
- Google Chrome: <https://www.google.com/intl/en/chrome/browser/>
- Firefox: <https://www.mozilla.com/en-US/firefox/>



Warning: Producer Express is not currently compatible with the Apple Safari browser, the browser used on most Apple iPads and iPhones.

Computing Devices

Desktop and laptop computers are the preferred computer devices to use when accessing Producer Express. Some tablets and smartphones, especially if they use Internet browsers other than Internet Explorer, Chrome or Firefox, can have compatibility issues. For example, Apple products using the Apple Safari Internet browser may experience significant compatibility issues. While some smartphones and tablets may have the ability to access the Producer Express application, especially if the smartphone or tablet utilizes Internet Explorer, Chrome or Firefox, smartphones and tablets may still experience compatibility issues.

PDF Reader

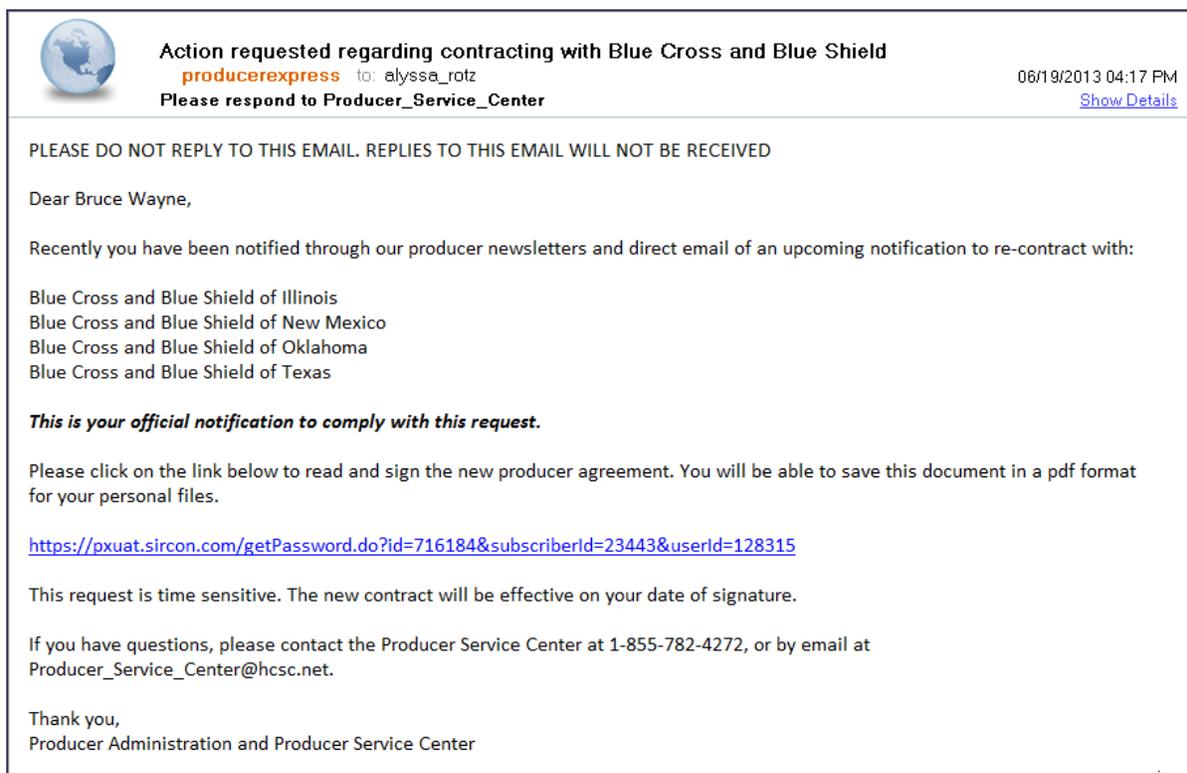
When using Producer Express, you will need to review documents that are in the PDF file format. You will need a recent version of Adobe Reader or Adobe Acrobat to view documents, if applicable. Reader is free and is basic PDF reading software; Acrobat is not free and includes more features and functions. Producer Express supports only the two most recent versions of Adobe Reader or Adobe Acrobat. Errors will occur if you try to access PDF files using an older version of either software application.

To download the free Adobe Reader software or to update it if you have an older version, visit <http://get.adobe.com/reader/>. If you have an older version and want to download a newer version, make sure to clear your Internet browser's cache and cookies from your browser settings before accessing Producer Express.

The Email Invitation

The producer recontracting process begins with Producer Express generating an automated email invitation to the producer or the agency principal. In preparation of receiving this email, producers should add producerexpress@sircon.com to their email account's address book, contact list, safe senders or safe recipients list to make sure they receive important Producer Express emails.

When producers access their email accounts, they should open the email from producerexpress@sircon.com with the subject line of, "Action requested regarding contracting with Blue Cross and Blue Shield." The body of the email includes a link that launches the Producer Express application. This is a link intended for a specific producer. **It cannot be transferred, forwarded to another email account or used by another producer or subproducer.**



Inside the body of the email, producers should click on the hyperlink to launch the electronic recontracting process in the Producer Express application. This is a producer-specific link intended for you only. Save this email and consider bookmarking the link or saving it as a favorite.

If you are currently contracted and/or appointed in more than one state, all applicable states will appear in the body of the email. You are not required to sign an agreement for each state; you will only need to sign one standard Producer Agreement.



Note: If you wish to recontract in an additional state, please complete the recontracting process in Producer Express. Then contact the Producer Service Center by calling 855-782-4272 so they may direct you to the proper recruiting team for adding additional states.

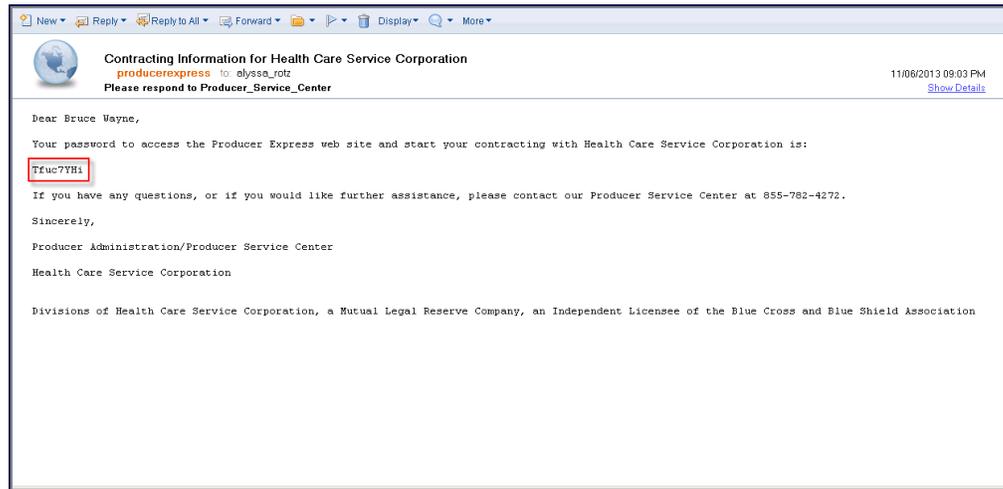
Welcome to Producer Express

At the “Welcome to Producer Express” page, click on the **Get My Password** button. Producer Express will automatically email a temporary password to the same email address where you received your email invitation.



Warning: When first using the Producer Express system, you have to obtain a temporary password first and then select your permanent password. During this process, **do not close the Producer Express application**. At minimum, complete all of the steps in Pages 3-7 in one sitting.

Go to your email account and open the new email with the subject, “Contracting Information for Health Care Service Corporation.” The email will contain an eight-character password, randomly generated and unique to you. **This temporary password is only valid for 30 minutes.** If 30 minutes lapses, click the “Get My Password” button again to have another temporary password sent.



Warning: Do not CUT and paste the password from this email. Cutting the password will not accurately copy. Instead, **type it** into the appropriate field in Producer Express.

Electronic Recontracting: An Agency and Producer Guide & FAQs

Go back to the Producer Express online system and the “Welcome to Producer Express” page. Type the temporary password into the Password field under the “Already have a password?” area of the page. Then click the **Continue** button.



Welcome to Producer Express

Need a password?

Welcome to Producer Express, the fastest way to get contracted with HCSC. Producer Express guides you every step of the way as it fills out the contracting forms for you.

To begin, you will need a temporary password to gain secure access to your contracting packet.

[Get My Password](#)

Already have a password?

If you already have a password, enter it into the box below and click on "Continue."

If you've lost your password, [click here](#) to have a temporary one sent to you.

Password [Continue](#)

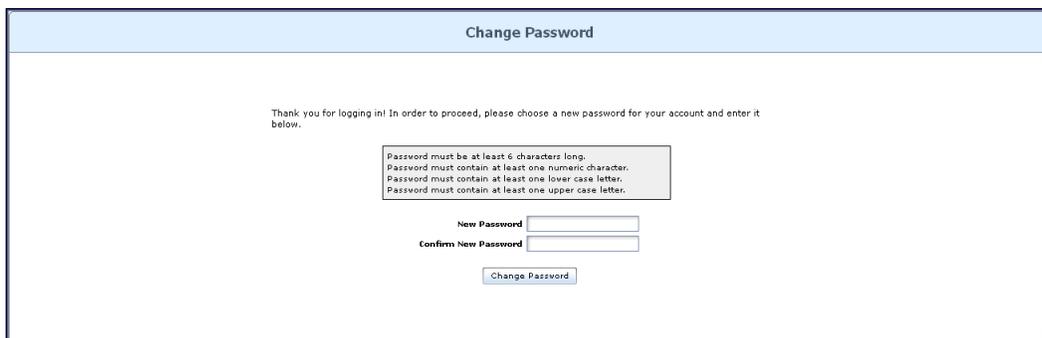
At the “Change Password” page, the producer must change the temporary password to a new, unique and memorable password with the following specifications:

- At least six characters long
- Contains at least one numeric character
- Contains at least one lower case letter
- Contains at least one upper case letter



Note: Be sure to save your permanent password. You may want to return to Producer Express later to view your documents.

Click the **Change Password** button after entering your new password. The “Getting Started” page opens.



Change Password

Thank you for logging in! In order to proceed, please choose a new password for your account and enter it below.

Password must be at least 6 characters long.
Password must contain at least one numeric character.
Password must contain at least one lower case letter.
Password must contain at least one upper case letter.

New Password

Confirm New Password

[Change Password](#)

Getting Started

The “Getting Started” page contains information on what a producer needs to do to complete the electronic recontracting process.

Welcome to Producer Express. The following pages will guide you through the four steps required to complete your contracting request. Please take a moment to review this page before you begin. Any additional instruction will appear as needed.

In addition, you will need the [Adobe Acrobat Reader](#) installed in order to view and print the documents after you have signed them. Note: If you have a version of Adobe Reader earlier than version 6.2, then you will receive a message indicating that a newer version of Adobe is available. If you decide not to download the newer version, the PDF files will still be displayed properly. Adobe Versions earlier than 8.0 are not supported.

The diagram below highlights 4 elements that will assist you in navigating through the process, followed by a brief description of each.

Name	Document Status
Appointment Application for Individuals	Signatures required (0 of 1)
Appointment Application ITL	Signatures required (0 of 1)
Producer Contract Agreement IL-128	Signatures required (0 of 1)
Producer Contract IL-128	No signatures required
ITL EFT Form	Signatures required (0 of 1)

1.) **Producer Icon:** As you progress through Producer Express, so will the producer icon. Some "stages" have more pages than others and the Producer Icon will reflect your progress accordingly. The four stages are as follows:

- Information Gathering** - You will be presented with several data entry fields (some required, some optional) that you need to complete in order to fulfill the document requirements.
- Review & Sign** - After all of your information has been entered, you will see the list of documents. Some may require an eSignature from you. This will be explained further once you get to this stage.
- Send Documents** - Once the documents are signed, you will click a button to send them to the Home Office for processing.
- Print** - Finally you will be able to view and print the completed documents using the [Adobe Acrobat Reader](#).

2.) **Start Over:** Clicking on "Start Over" will return you to this page. Any information you have previously entered will have been saved and available for any changes you may need to make.

3.) **Navigation Buttons:** These buttons will simply navigate you through the process.

4.) **Save & Exit:** If you are unable to complete your documents in one sitting, "Save & Exit" will save all information you have entered to that point.



Note: While working on the recontracting packet, you can click the **Start Over** button to return to the “Getting Started” page. We suggest you complete the process in one sitting. If you can’t, click the **Save and Exit** button. The system retains your data, and you can pick up where you left off next time.

Be sure to read the “Getting Started” page carefully. Click the **Start** button to continue.

Interview Questions

The “Interview Questions” page of Producer Express displays prepopulated **Recontracting Producer Information**. This is personal and professional information we have on file for you or your agency. Review all information populated on this page.

As long as your name and Social Security Number (or federal tax ID number, also called an Employer Identification Number) are correct, you can continue with the recontracting process in Producer Express.

Once you have reviewed the content under the **Recontracting Producer Information** section of the “Interview Questions” page, click the **Continue** button.

Recontracting Producer Information

Individual Information

First Name Mary
Last Name Poppins
SSN 191001964
Email Address alyssa_rotz@bcbsil.com
Title

Mailing Address Information

Address Line One 17 Cherry Tree Ln
Address Line Two
City London
State Texas
Postal Code 76854

Phone Number Information

Business Phone 5556667777
Ext.
Resident Phone



Note: If your name or Social Security Number (or federal tax ID number, also called an Employer Identification Number) is incorrect, contact the Producer Service Center by calling 855-782-4272. If any other information is incorrect, please complete the recontracting process and update your information on the Blue Access for ProducersSM portal soon after.

Review and Sign Documents

Once you review the “Interview Questions” page and click the **Continue** button, the “Review and Sign Documents” page opens. This page provides a summary of the documents requiring your review and electronic signature. The following documents are available for your review, depending on the states in which you operate.

Producer Agreement

The Producer Agreement is the main contract. An electronic signature is required on the Producer Agreement. If you are a producer in Illinois or Texas, this is the only document that appears.

New Mexico Addendum

The New Mexico addendum is required for all producers and agencies currently contracted in New Mexico. This is an addendum to the standard Producer Agreement, applicable to New Mexico business rules only. Review the addendum carefully. The addendum does not require a signature.

Oklahoma Addendum

The Oklahoma addendum is required for all producers and agencies currently contracted in Oklahoma. This is an addendum to the standard Producer Agreement, applicable to Oklahoma business rules only. Review the addendum carefully. The addendum does not require a signature.

The documents are now ready for your review. Each document will be displayed on the screen with the data you have provided. If you believe the document is in good order, click the “Sign This Form” button to provide an eSignature. The eSignature will lock the document and prevent any further changes during the home office review.

What is an eSignature? ([click for more...](#))

If you find an error on any of the forms, click the “Start Over” button above to return to the beginning of the data collection process. You will not lose any data that you have entered.

Name	Document Status
Producer Agreement	Signatures required (0 of 1)
OK Addendum	No signatures required
NM Addendum	No signatures required

If you require a hard copy for review prior to completing the eSignature process, please contact the Company licensing department at Producer_Service_Center@hpsc.net.

I understand and consent to use of an electronic record to effectuate and document my relationship with Health Care Service Corporation (referred to as the “Company”). I acknowledge that by affixing my electronic signature to each document that I have read and understand the entire contract package including but not limited to the Agency Agreement and supporting documents as listed above. By my electronic signature below, I agree to and accept the terms of each and specifically acknowledge that said terms govern and control my relationship with the Company.

I represent that the personal information I have provided herein to the Company is complete, true and correct. I understand and agree that in making this application for contract.

Electronic Signature Information

Below the list of documents requiring your review are statements about the use of electronic records and electronic signatures. Read this information carefully. If you agree to these statements, click the **I Agree** button.

After you click on the **I Agree** button, an electronic version of each document opens. Carefully read all information presented.

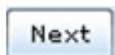


If you agree to the information presented, you can apply a legally enforceable electronic signature by clicking on the blue “Click to Sign” box. When you click the blue **Click to Sign** button, Producer Express locks your “signature” in to the document and Producer Express presents the next document requiring your review.

You will have an opportunity to save PDF files of each document or print each document in the next few steps.



Note: The New Mexico and Oklahoma Addendums do not require signatures so you will not see the blue **Click to Sign** box for these documents. You must review the addendums and click the **Next** button located near the “Sign Document” header. You will only see these addendums if you are selling in New Mexico and/or Oklahoma.



Send Request

Once you have electronically signed the required documents, the “Send Request” page opens. If you are sure that all information you’ve submitted is accurate, click the **Send Now** button.

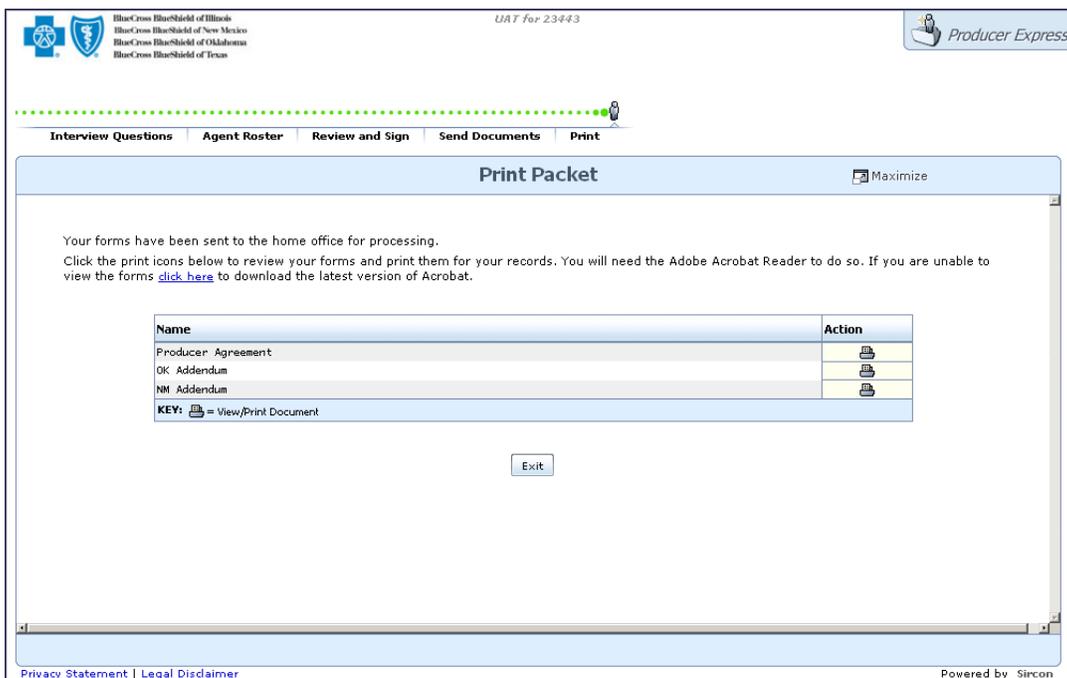


Print Packet

Next, the “Print Packet” page opens. You have the ability to view, print and save PDF versions of your documents.

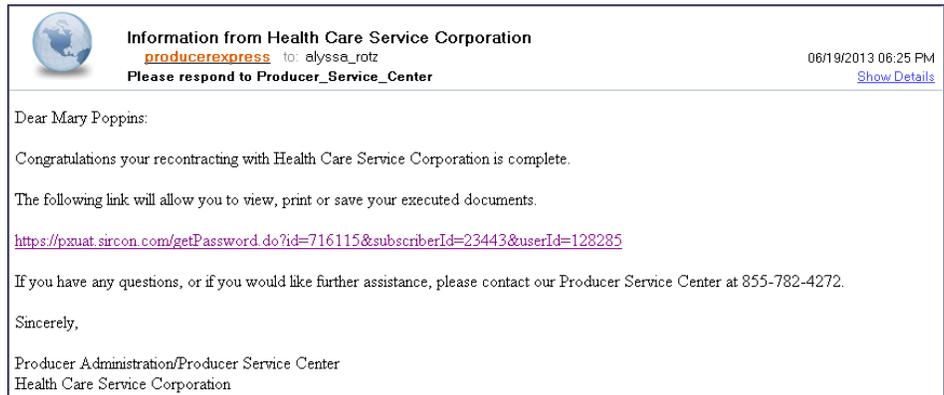
Click on the View/Print Document icon (🖨️) to open any of the documents in Adobe Acrobat or Adobe Reader. You will notice that your signature is green on all of the documents that you signed electronically.

The recontracting packet is nearly complete! You may exit the system by clicking the **Exit** button at the bottom of the “Print Packet” page.



Logging Back in to the Transaction

You then will receive a congratulatory email from Producer Express notifying you that the recontracting process has been successfully completed. The email will contain a link for you to log in to Producer Express to view your documents. Click on the link contained in the email.



Enter the password you created at the beginning of your recontracting process in the “Already have a password?” area and click the **Continue** button.



At the “Print Packet” page, you can view, save and print your documents again. Click on the View/Print Document icon (🖨️) to open any of the documents in Adobe Acrobat Reader.



Your Producer Agreement will now be fully executed and contain *all* authorized signatures!

Frequently Asked Questions

The Email Invitation

Q: What do I do if I lose or delete my email invitation containing the link that launches the Producer Express application?

A: Make sure to save the original email containing the link to your transaction until you have completed the entire recontracting process. Once you have signed all your documents, you will receive a congratulatory email to confirm that your recontracting is complete.

The congratulatory email will contain a link to your final transaction. Because a link is “unique,” it will only take you to your own record. We suggest bookmarking this link or saving it as a favorite to prevent losing it, and for quick access to your contract documents. If, however, you do lose the link, you should contact the Producer Service Center by calling 855-782-4272.

Q. What if I don't receive the email invitation?

A: Email applications have become more and more strict when analyzing incoming emails and categorizing them as junk or spam emails. In preparation of receiving this very important email, you should add producerexpress@sircon.com to your email address book, contact list, safe senders or safe recipients list to make sure important recontracting-related emails are received. If you haven't received the email invitation, check the “junk” or “spam” folder. Also, please note that a company's email privacy settings may have blocked the email.

Internet Browsers

Q: If Producer Express is an online application, what Internet browser should I use?

A: Producer Express is compatible with three Internet browser applications: Microsoft's Internet Explorer, Google's Chrome and Mozilla's Firefox. If you use Apple Safari, Opera or another Internet browser application, you may experience compatibility issues. Some functionality may be available with other Internet browsers. Issues encountered with the application while using alternate browsers cannot be supported.

Q: What version of Internet Explorer, Chrome or Firefox do I need to have?

A: Producer Express only supports the last two versions of Internet Explorer, Chrome or Firefox. Older versions of these applications may result in compatibility issues and cannot be supported.

Computing Device Compatibility

Q: What kinds of computing devices can I use with Producer Express?

A: Desktop and laptop computers are the preferred computer devices to use when accessing Producer Express. Some tablets and smartphones, especially if they use Internet browsers other than Internet Explorer, Chrome or Firefox, can have compatibility issues. Producer Express is not compatible with devices using the Apple Safari browser, such as the iPad or iPhone.

Passwords

Q: The temporary password sent to me isn't working. What can I do?

A: When you first begin the recontracting process, you will need to obtain a temporary password, which will be sent to you via email. The email will contain an eight-character password unique to you.

Do not CUT and paste the temporary password from this email into Producer Express. Cutting the password from the email will not accurately copy. Instead, **type it** into the appropriate field in Producer Express.

This temporary password is only valid for 30 minutes. If you try to enter the temporary password after the 30-minute window, you'll receive an error message. You'll need to click the **Get My Password** button again to have another temporary password sent to you.

Note that each request for a temporary password invalidates the previous request.

Q. What do I do if I lock myself out of the system (exceed the number of password attempts)?

A: **You are allowed four login attempts** before you are locked out of the Producer Express system. If this occurs, contact the Producer Service Center by calling 855-782-4272, Monday through Friday, 8 a.m. to 5 p.m., CT.

Producer Express General Questions

Q. What is Producer Express?

A: Producer Express is a Web-based software application designed to help with the recruiting, onboarding, contracting, recontracting and management of producers and agencies. It is owned by Siron Corporation, a subsidiary of Vertafore, Inc.

Q. Who is the Home Office?

A: The Home Office is the Producer Express phrase for our own Producer Services and Administration departments.

Q: What is the difference between a packet and a transaction?

A: The terms "packet," "transaction," and "request" are used interchangeably in Producer Express. All of these terms refer to the work that is being processed. For producers it might be the onboarding, contracting or recontracting process.

Q. How will I know if there's an issue or error with the recontracting packet?

A: If there is an issue with the recontracting process, a representative from Producer Services and Administration will reach out to you.

Updating Your Demographic Information

Q: Once I'm through the recontracting process, how do I update my demographic information?

A: All contact and demographic information updates will be handled as they have previously been handled. Log in to Blue Access for ProducersSM. Click on the User Profile tab in the upper right-hand corner. Click on the **Change Contact Information** button. Make your updates and click **Submit** at the bottom of the page.

Navigation

Q: Will Producer Express time out after a certain amount of time of activity or inactivity?

A: Yes. After a period of inactivity of approximately 45 minutes, your session will be timed out and you will be required to log back in to the system. All your work will be saved, and you will be able to pick back up where you left off.

Q: What will happen if I use the Back or Forward buttons on my browser's toolbar?

A: Since Producer Express is an online software application, and not like typical website pages, using the **Back** or **Forward** buttons on your Internet browser's toolbar will not take you back or forward to the last page visited. Instead, your browser may simply remain on the current page, or it may bring you back to the beginning of your transaction without saving portions of your work. **DO NOT** use your Internet browser's back and forward commands to move through the Producer Express system; use the Producer Express buttons instead.

Q: How can I navigate back or forward through the Producer Express screens?

A: To move between different screens of Producer Express, click the **Continue** or **Back** buttons on the bottom of the Producer Express pages.

Where available, you may also use the back (◀) and forward (▶) icons next to the workspace tabs.

Q: Can I have multiple browser windows open while accessing Producer Express?

A: You can have additional browser windows open as long as they are accessing sites other than Producer Express. **You cannot have multiple Producer Express windows open simultaneously – doing so will cause system errors.**

Q: What if I accidentally close the browser window before I complete the recontracting process?

A: Each time you click the **Continue** button, Producer Express saves your information. If you accidentally close the browser window, the application will save all of your information up through the last page you've completed or the last page on which you clicked the **Continue** button. All you have to do is log back in to your transaction.

To log back in, click on the link you were sent in the original email invitation. You will be brought to your Producer Express login screen. Enter the password you created earlier in the process. Use the **Continue** button on the Producer Express pages (not the navigation buttons on the Internet browser application) to get to the pages that still need completing.

Q: What happens if I Save & Exit if I've only partially completed the recontracting process?

A: When you click on the **Save & Exit** button/icon, Producer Express will save all information you've entered up to that point. All you have to do is log back in to your transaction.

To log back in, click on the link you were sent in the original email invitation. (You will be brought to your Producer Express login screen. Enter the password you created earlier in the process. Use the **Continue** button on the Producer Express pages (not the navigation buttons on the Internet browser application) to get to the pages that still need completing.

Viewing and Signing Documents

Q: How will I be able to read and sign documents in Producer Express?

A: You will need a recent version of Adobe Reader or Adobe Acrobat to view, print, sign and save your agreement documents, which are in PDF file format. Reader is free; Acrobat is not. To download Reader or to update it if you have an older version, visit <http://get.adobe.com/reader/> . If you have an older version of Reader and want to download a newer version, make sure to clear your Internet browser's cache and cookies from your browser settings.

Q: What version of Adobe Reader will I need?

A: Producer Express supports the two most recent versions of Adobe Reader and Adobe Acrobat. The most current version available is 11. As long as you have either version 10 or 11, you will be able to utilize all related functions within Producer Express. Versions earlier than 8 are not supported at all.

Q: What will happen if I don't have the correct version of Adobe Reader?

A: Some specific functions of Producer Express may not be available to you if you do not have either Adobe Reader 10 or 11. These functions may include being able to apply an electronic signature.

Q: I have the correct system requirements, but I'm still having issues accessing the application. What now?

A: Try the following:

1. Make sure you're using either Internet Explorer, Chrome or Firefox as your Internet browser.
2. Check to make sure your Internet browser is a recent version.
3. Verify that you have a recent version of Adobe Reader or Acrobat. If not, download the latest version of the free Adobe Reader.
4. Clear your browser's cache and cookies.

If you still have issues using Producer Express, contact the Producer Service Center by calling 855-782-4272. Please provide as much detail about the issues as possible.

Q: How will I know that my electronic signature was applied to the document successfully?

A: When you click the **Click to Sign** button on each document requiring a signature, the page will automatically take you to the next document for review. Then you will be directed to the "Print Packet" page, where you can open PDF versions of each document to review and save. Your electronic signature will be shown as green text.

Q: I've already signed my documents and realize I've made an error. How do I revise the information?

A: If you haven't already clicked the **Send Now** button on the "Send Request" page, you still have the opportunity to click **Start Over** and return to the beginning of your packet. All of your information will have been saved in Producer Express.

If you have already clicked the **Send Now** button on the "Send Request" page, please contact the Producer Service Center at 855-782-4272.