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Illinois • Montana • New Mexico
Oklahoma • Texas

OCTOBER 3, 2017

Retail Producer Portal Guide

The Retail Producer Portal is a comprehensive business management and client service tool. The portal enables you to design and deliver quotes, enroll members in Blue plans, manage prospects and serve and support active clients with a host of features developed directly from your feedback.

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1 Registering for the Portal

Only those that have completed our onboarding/contracting process can register with the Retail Producer Portal. That process includes completing important contact and license information via the online Producer Express onboarding system.

After the onboarding/contracting process is complete, you will receive a “Welcome” email with your personal nine-digit producer identification number.

At that point, you are ready to register with the Retail Producer Portal.

Go to <https://osc.hcsc.net/producerportal/>

If you have completed the onboarding process, click the “Register” button.

Retail Producer Portal

Menu Account

Please Sign-In

User Name
User Name

Password
Password

Register **Login**

[Forgot User Name?](#)
[Reset Password?](#)

Welcome

Welcome to the Retail Producer Portal.
This site provides 24-hour access to information and tools to help you better manage your business and service your clients.

You can:

- Check the status of your applications and current business
- Search for clients using preset quick or advanced searches
- Verify payment status
- Download forms
- Access training materials

Jeffery Welch
Divisional Vice President, Consumer Markets Sales

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Select a User Name and Password

Complete all required fields to register for the Retail Producer Portal.

1. Enter your First and Last Name
2. Enter a User Name
3. Create a Password and confirm it.
 - The password must be six to nine characters.
 - The password can only contain letters and/or numbers; no special characters are allowed.
 - If you select letters, the letters can be lower case, upper case or a mix of both.

Registration

The Retail Producer Portal allows Producers to access information about their Retail Market and Medicare Supplemental individual business.

To apply for this service, please complete the form below. Please select at least one Blue Cross and Blue Shield (BCBS) state you would like to register for and then submit your request.

NOTE: Once your request is submitted, it can take up to 24 HOURS on a regular business day, and longer on the weekend, before you receive a confirmation e-mail letting you know your activation is completed. (Example: If you register on Monday at 3:00 PM, you should receive access by 3:00 PM on Tuesday. If you register Friday, Saturday or Sunday, it could be Monday or Tuesday before you receive an e-mail confirmation.) Please do NOT register more than one time. If you do not receive a confirmation e-mail within the time frames specified above, please select the 'Contact Us' link at the top of this page and call the telephone number associated with your BCBS state.

1	First Name *	Last Name *
	<input type="text"/>	<input type="text"/>
2	User Name * ?	Password * ?
	<input type="text"/>	<input type="text"/>
	Confirm Password *	
	<input type="text"/>	

Note: User Name and Password are case sensitive.

Register for Your State

4. Select all the states in which you are authorized to sell.
5. Complete all required fields for each state. Required fields have a red asterisk.
6. In the Agent Unique ID box, enter the nine-digit identification number included in your "Welcome" email when you completed contracting (producers and agencies) or onboarding (subproducers) with our Producer Administration teams.
NOTE: If you contracted or onboarded to sell in multiple states, you have a unique ID number for each state.
7. Click the "Continue" button.

The screenshot shows a registration form for Illinois. At the top, there is a checkbox labeled '4' and 'Register for Illinois' which is checked. Below this are several input fields: 'Company Name', 'Address 1 *' (with a red asterisk and callout 5), 'Address 2', 'City *', 'State *' (a dropdown menu showing 'IL'), and 'Zip Code *'. Below these is the 'Agent Unique ID *' field (with a red asterisk and callout 6) which has a tooltip that reads: 'Please enter the 9 digit identification number you were provided at the time of licensing by Producer Administration.' Below that are 'Phone *' and 'E-mail Address *' fields. At the bottom of the form, there are four more checkboxes for other states: 'Register for Montana', 'Register for New Mexico', 'Register for Oklahoma', and 'Register for Texas'. A legend at the bottom left states '* Denotes a required field.' At the bottom right, there is a blue 'Continue' button with a red callout 7 around it.

Register for Your State (continued)

8. After you click the "Continue" button, a confirmation message appears. Either select "Edit" to change the information you entered or click on the "Submit Registration" button.
9. Once you submit your information, a note pops up that you can have full use of the site once you receive a confirmation email. It can take up to 24 hours on a regular business day – and longer on the weekend – before you receive the confirmation email. For example, if you register at 3:00 p.m. on Monday, you should receive access by 3:00 p.m. on Tuesday. If you register Friday, Saturday or Sunday, it could be Monday or Tuesday before you receive an email confirmation. Click the "Back to Login Page" button, but note that it takes another day or two to activate your registration.

Please do not register more than one time.

Print this page for your records.

User Name:	PName1
First Name:	Producer
Last Name:	Name

Confirm Illinois Registration Information

Company Name:	Producer Name Company
Address 1:	123 Test St.
Address 2:	
City:	Testville
State:	IL
Zip Code:	99999
Agent Unique ID:	
Phone:	5555555555
E-mail Address:	

8

Edit Submit Registration

Registration Information

Thank you, your registration information has been submitted. You will receive an e-mail confirming your activation within 1 business day. Please retain the User Name and Password you submitted for your records.

9 Back to Login Page

Retail Producer Portal Registration Activation

This notice is to alert you that your registration request has been activated.

If you have any questions regarding this notification, please contact Producer Services toll free at (888) 313-5526.

State Farm agents - please call 1-877-699-5849 for assistance.

NOTE: Any replies to this E-mail will not be received.

Thank you,
Retail Producer Portal Customer Service

Registration Confirmation Email

Once you receive your activation email (example at left), you can return to the [Retail Producer Portal](#) and log in with the User Name and Password that you created during the registration process. If you do not receive this email within two business days, please contact us.

2 Logging In to the Portal

After going through the registration process, and receiving your registration confirmation email (see previous page), you can go to the [Retail Producer Portal](#), log in and use the site.

You should bookmark this page or save it to your favorites.

Login

1. Enter the User Name you created during the registration process.
2. Enter the Password you created during the registration process.
3. Click the "Login" button.

BlueCross BlueShield of Illinois
BlueCross BlueShield of Montana
BlueCross BlueShield of New Mexico
BlueCross BlueShield of Oklahoma
BlueCross BlueShield of Texas

Retail Producer Portal

Menu Account

Please Sign-In

User Name 1

Password 2

Register Login 3

[Forgot User Name?](#)
[Reset Password?](#)

Welcome

Welcome to the Retail Producer Portal.
This site provides 24-hour access to information and tools to help you better manage your business and service your clients.

You can:

- Check the status of your applications and current business
- Search for clients using preset quick or advanced searches
- Verify payment status
- Download forms
- Access training materials

Jeffery Welch
Divisional Vice President, Consumer Markets Sales

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Recover Your User Name

If you forget your User Name at any time, follow these steps.

1. On the login page, click on the "Forgot User Name?" link.
2. In the "Forgot User Name?" screen, enter the "Agent Unique ID" in the space provided. This is your nine-digit producer number that was included in your "Welcome" email after you completed our contracting/onboarding process.
3. Enter the email address associated with the account in the space provided.
4. Click the "Submit" button.
5. A confirmation message appears letting you know that we sent your user name in an email to your email address on file. Click the "OK" button.
6. You'll receive an email with your user name. If you don't see the email in your inbox, check your spam or junk folder. Return to the [Retail Producer Portal](#) and enter your user name and password.

	IL	NM	OK	TX	MT
Major Medical	(888) 313-5526	(888) 222-0572	(888) 399-9394	(888) 697-0679	(855) 454-7109
Medicare Supplement	(800) 538-0382	(800) 307-8144	(800) 522-9266	(800) 366-4236	N/A

Reset Password

If you forget the password you originally used to set up your account, follow these steps to create a new password.

1. On the login page, select the "Reset Password?" link.
2. Enter the user name in the space provided.
3. Enter the email address associated with the account in the space provided.
4. Click the "Submit" button.
5. A confirmation message appears letting you know that we sent you a temporary password to your email address on file. Click the "OK" button.

Retail Producer Portal

Menu Account

Please Sign-In

User Name

Password

Register Login

Forgot User Name?
[Reset Password?](#)

Welcome

Welcome to the Retail Producer Portal. This site provides 24-hour access to information and tools to help you better manage your business and service your clients.

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Request Submitted

Your password has been mailed to the registered e-mail address.

OK 5

Reset Password?

Please enter your User Name and the E-mail Address associated with your account to reset your Password. If you need assistance, please contact Producer Services at:

	IL	NM	OK	TX	MT
Major Medical	(888) 313-5526	(888) 222-0572	(888) 399-9394	(888) 697-0679	(855) 454-7109
Medicare Supplement	(800) 538-0382	(800) 307-8144	(800) 522-9266	(800) 366-4236	N/A

State Farm agents - please call 1-877-699-5849 for assistance.

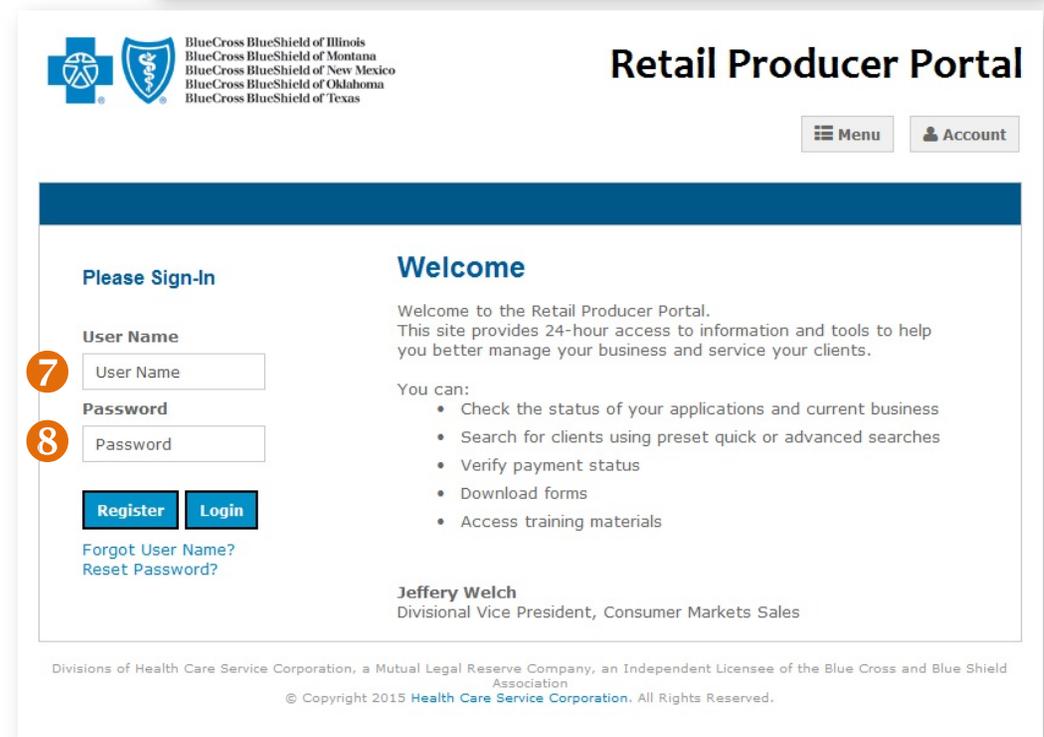
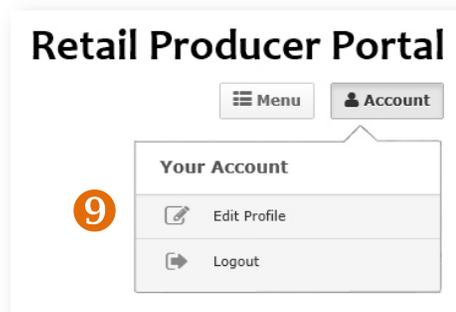
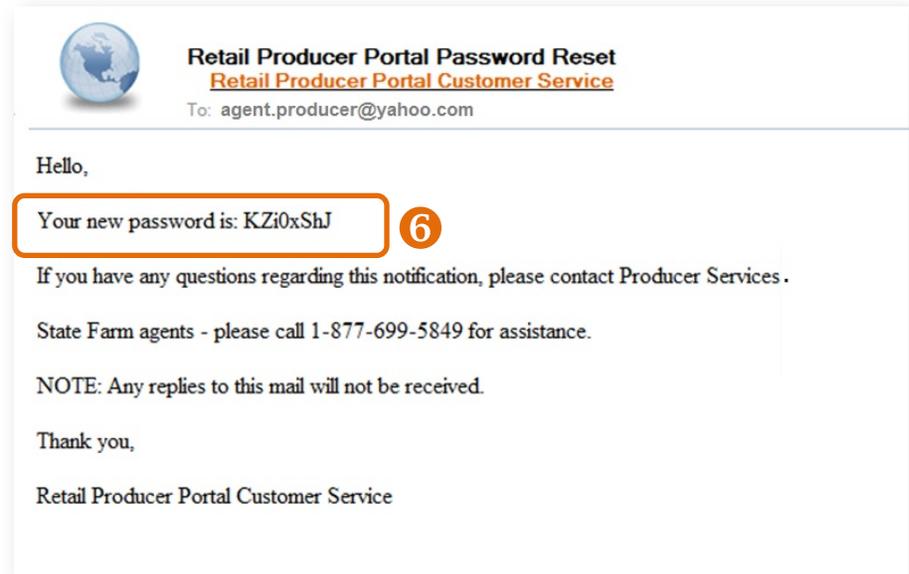
2 User Name*

3 E-mail Address *

4 * Denotes a required field.

Reset Password (continued)

6. We send you an email with the subject line of "Retail Producer Portal Password Reset." The email includes a case-sensitive temporary password.
7. Return to the [Retail Producer Portal](#) and enter your user name
8. Enter the temporary password from the email.
9. After logging back into the Retail Producer Portal with the temporary password, select "Edit Profile" from the dropdown Account menu. The Account menu is located in the top right section of the portal.



Reset Password (continued)

1. In the Change Password section, enter **the temporary password from the email** into the "Current Password" field. Enter a new password in the "New Password" field and confirm the new password.
 - The password must be six to nine characters.
 - The password can only contain letters and/or numbers; no special characters are allowed.
 - If you select letters, the letters can be lower case, upper case or a mix of both.
2. Select the "Update Password" button.
3. A confirmation message appears. Select the "Back to Profile Page" button.

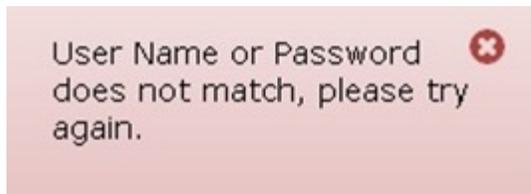
The screenshot shows a 'Change Password' form with three input fields: 'Current Password *', 'New Password *', and 'Confirm New Password *'. An orange circle with the number '1' is positioned to the right of the 'New Password' field, with three arrows pointing to each of the three input fields. Below the fields is a blue 'Update Password' button, which is circled in orange with a '2' next to it.

The screenshot shows a 'Password Update' confirmation message with the text 'Your password has been updated.' Below the message is a blue 'Back to Profile Page' button, which is circled in orange with a '3' next to it.

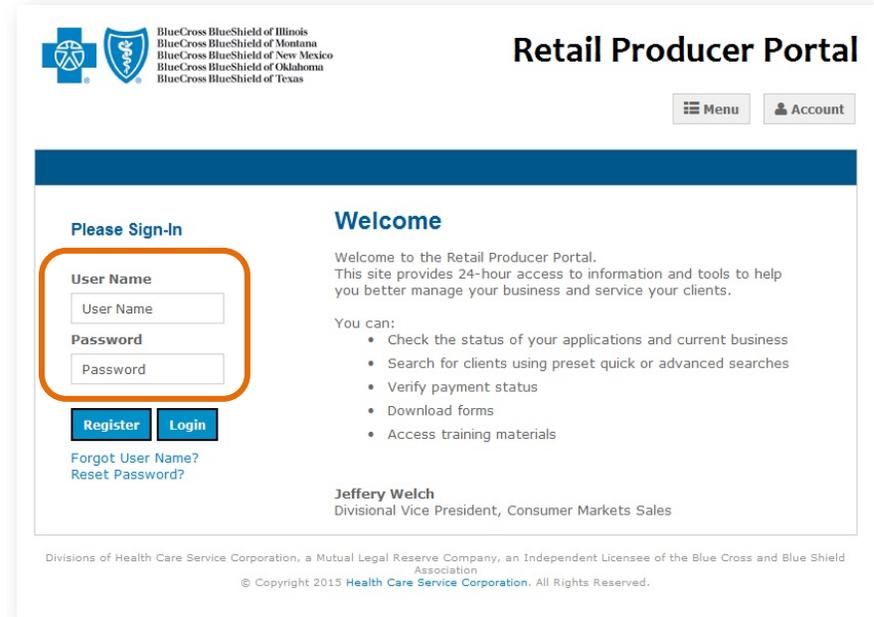
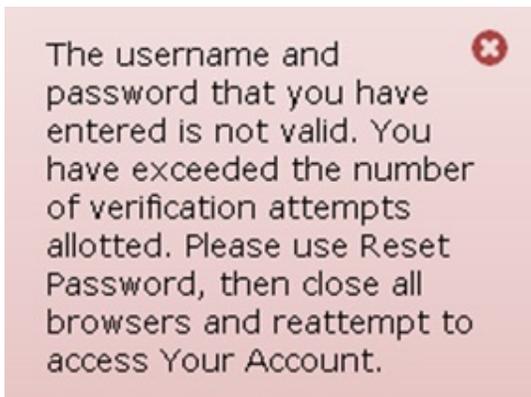
Account Lock Out

Using the incorrect user name and/or password three consecutive times results in an account lock out.

If you enter the incorrect combination of “User Name” and “Password” on your first and second attempts, the following error message appears.



After the third attempt, you'll see the following message.

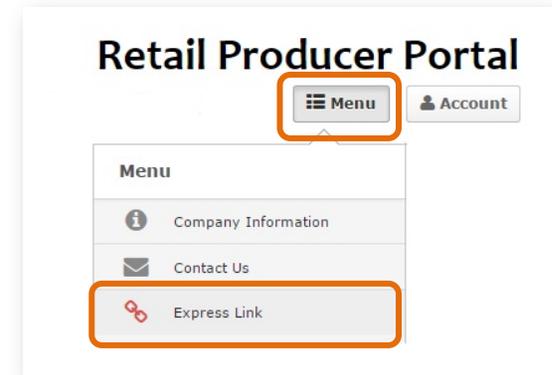


At this point, you should use the “Forgot User Name?” or “Reset Password?” features to retrieve your user name and reset your password before you attempt to log in again. Please see pages 8-11 for details. Once you have retrieved your user name and reset your password, close your web browser application and clear the application’s history and cache before attempting to log in again.

3 Using Your Express Link

After you register for the portal, you will have access to Express Link. Express Link is a customized HTML hyperlink, embedded with your name and nine-digit producer number. When clients click on the code – in the form of a link or web button – it takes them to our Retail Shopping Cart and your producer info is attached to their shopping and enrollment experience. If a client starts an application, your producer info is automatically added to the application. Express Link ensures that you receive credit for any policies sold.

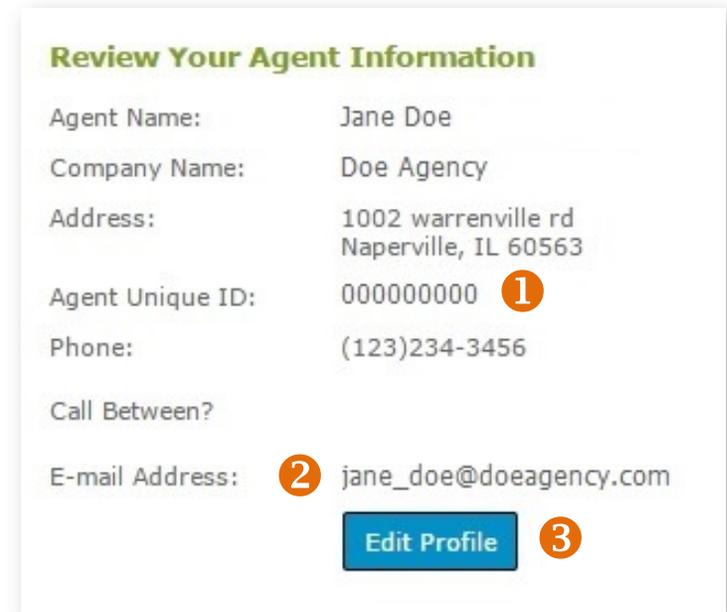
To get started on using your Express Link, click in the top right section of the portal, select the “Menu” button, and scroll to the “Express Link” option and select it. The following sections show you how to configure and use your Express Link.



Review Your Agent Information

1. In the Express Link configuration screen, make sure the information displayed in the “Review Your Agent Information” section is correct, especially your nine-digit producer number (Agent Unique ID). Applications, enrollments and your FFM registration are linked to your producer number allowing you to receive credit for your sales.
2. Using a valid agent email address ensures you receive email notifications about a client’s application.
3. If you need to edit this information, click on the “Edit Profile” button.

NOTE: Agent Name and Agent Unique ID cannot be edited. If your name changes, contact the Producer Service Center for next steps. See page 63 for contact information.

A screenshot of the 'Review Your Agent Information' form. The form contains the following fields and values: Agent Name: Jane Doe; Company Name: Doe Agency; Address: 1002 warrenville rd, Naperville, IL 60563; Agent Unique ID: 000000000 (with a circled '1' next to it); Phone: (123)234-3456; Call Between? (empty field); E-mail Address: jane_doe@doeagency.com (with a circled '2' next to it). At the bottom right of the form is a blue 'Edit Profile' button with a circled '3' next to it.

Select "Need Assistance" Info

1. In this section, choose the content you want displayed in online applications started by clients.
2. A preview of the information you choose is displayed in the "Box Preview" area.

Customer Online Application 'Need Assistance?' box

Select optional information that you would like to display on the Online Application pages. Changes will update automatically in Box Preview.

Agent Name (Required)
 Company Name
 Address
 E-mail Address
 Phone (Required)
 'Call Between' hours

Need Assistance? Contact Your Agent:
BapTest ScriptAccount
(123)234-3456

Box Preview

Get Your Express Link!

1. You can use Express Link in two ways. You can generate "link" code that you copy into an email, or you can generate "button" code for use on your website. This code is specific to you. Read below on how to copy either the "link" or "button" code.
2. The "link" code is displayed here.
3. To copy the "link" code, click on the blue "Get HTML Link Code" button.
4. This preview area displays how the link will appear to clients.
5. The "button" code is displayed here.
6. To copy the "button" code, click on the "Select Button Code" button. You may need the help of a web developer to add this button code to your website.
7. This preview area shows how the button code will look to your website visitors.

Tips for Using Express Link:

- If you share your Express Link by email, ask clients to save the email until enrollment is complete.
- Clients should use your link to access our Retail Shopping Cart, then log in or create a new account right away. For details on helping your clients create a Retail Shopping Cart account see pages 23-25.

1 Get Your Express Link!

Decide which type of Express Link you would like to use then...

- Click the desired button (Get HTML Link Code or Select Button Code) to highlight the link.
- Right click (if using PC) or control click (if using MAC) on the highlighted link.
- Select "copy", then paste the link into your Web page or e-mail.

Note: Express Links will not be affected by changes to your Profile. You should only have to copy each link once.

Personalized Link To OSC Online Application

2 This will create a link inside your webpage and/or e-mail and open the Online application in a new browser window.

```
https://retailweb.hcsc.net/retailshoppingcart/IL/census?ExpressLinkedAgentId=236615
```

3 Get HTML Link Code

4 Preview Link
Get a free Quote from BCBSIL

Personalized Button To OSC Online Application

5 This will create a link inside your webpage and/or e-mail and open the BCBSIL application in a new browser window.

```
<a href='https://retailweb.hcsc.net/retailshoppingcart/IL/census?ExpressLinkedAgentId=236615'  
target=new_window><img src='https://osc.hcsc.net/ProducerPortal/Common/Images/getStarted.png'
```

6 Select Button Code

7 Preview Button
Get Started

4 Creating a Proposal/Quote

You can use the Retail Producer Portal to create proposals and/or quotes and send them to clients. Here's how.

Enter Client/Applicant Information

1. Select the Quotes tab.
2. Complete the required fields for the quote. We refer to this initial information as the "census."
3. Note that a "County" field appears under the zip code after the zip code has been entered. If more than one county is available, click outside of the zip code box and then select the county from the drop down list.
4. Enter all of the primary applicant's information. Additional fields may appear, such as those for a spouse and children, but only after the other census information is entered (including birthday) for the primary applicant.
5. Select the "Continue" button.

The screenshot shows the 'Applicants' section of the Retail Producer Portal. At the top, there is a navigation bar with tabs: Home, Client Info, E-Communication, **Quotes** (highlighted with a circled '1'), Resources, and Training. Below the navigation bar, the 'Applicants' section contains the following fields:

- Primary Applicant's Name:** Jane [MI] Doe (Callout 2)
- What is the Applicant's Zip Code?:** 60502 (Callout 3)
- What is the Applicant's County?:** Dupage (dropdown menu)
- Applicant's Requested Effective Date:** 11/01/2017 (Callout 3)

Below these fields, there is a note: "Please note: Major Medical and Dental applications must have first of the month coverage effective dates. This information does not apply to Temporary coverage. Temporary Plans cannot have an effective date greater than 30 days in the future."

The section **Who will this health insurance plan be covering?** includes:

- Primary:** (Callout 4)
- Sex:** Female (dropdown menu)
- Birthday:** 08/21/1975
- Tobacco Use:** Yes No (Callout 3)

At the bottom of the form, there are two buttons: "Add Spouse" and "Add Dependent". In the bottom right corner, there is a green "Continue" button (Callout 5).

Select Matching Plans

1. From the **Matching Plans page**, you can select up to **three** Medical plans by checking the box beside the plan name.

2. You can also check the “Yes” or “No” box beside “Dental Coverage.” If “Yes” is selected for dental, the dental plans appear in a drop down list.

3. If you don’t need a quote or proposal, and you want to begin the enrollment application now, select “Apply for This Plan” next to the desired plan. (See pages 26-28 for the steps on applying online.)

4. If you want to make changes to the applicant’s “census” info, select the “Return to Applicants Page” link at the top or button at the bottom. See the next page for more details.

5. If you want to save these options as a proposal, select the green “Save Proposal” button. See the next page for more details.

6. If you want to send a quote, select the green “Send Quote” button. See page 18 for more details.

7. If you want to compare plans, select the “Compare up to 3 Plans” button at the bottom of the screen. See page 19 for next steps.

Matching Plans

1. Review the plans below
These plans best match your criteria.

2. Compare up to 3 plans
Check the boxes below up to 3 plans, then choose "Compare Selected Plans".

3. Apply online or by mail
Select the plan that interests you and apply today.

Your Options

1 Applicant(s), ZIP 60510, Kane County, Requested effective date 10/01/2017

4 Return to Applicants Page

Visit Healthcare.gov or state specific BCBS.COM site for a tax credit estimate or to apply with an official tax credit subsidy.

Sort By
Select One

Off-Exchange & Temp Plans On-Exchange

Viewing 2 of 19 matching plans.

1 Blue Precision Gold HMO 101 Plan Details

Network	Deductible	Individual Out-of-Pocket Maximum	Coinsurance	Copay	Premium
Blue Precision	\$1,750	\$3,500	80	\$25	\$470.79

2 Dental Coverage Yes No

3 Apply for This Plan >

BlueCare Direct Gold 101 with Advocate Plan Details

Network	Deductible	Individual Out-of-Pocket Maximum	Coinsurance	Copay	Premium
BlueCare Direct	\$1,750	\$3,500	80	\$25	\$423.71

Dental Coverage Yes No

4 Return to Applicants Page

5 Save Proposal

6 Send Quote

7 Compare up to 3 Plans

Return to Applicants Page

1. If you selected **Return to Applicants Page** from the Matching Plans screen (see previous page), you are directed back to the “Applicants” page.
2. Note that effective dates for major medical off-exchange policies must begin on the first of the month. Effective dates for temporary or short-term plans can be any time of the month.
3. You can change or add information in this section. For example, you can add or remove a spouse and/or children.
4. Click on the “Continue” button after making your changes.

1 Applicants

Primary Applicant's Name: Jane MI Doe

What is the Applicant's Zip Code? 60502

What is the Applicant's County? Dupage

2 Applicant's Requested Effective Date: 11/01/2017

Please note: Major Medical and Dental applications must have first of the month coverage effective dates.
This information does not apply to Temporary coverage. Temporary Plans cannot have an effective date greater than 30 days in the future

Who will this health insurance plan be covering?

3

	Sex:	Birthday:	Tobacco Use: ?
✓ Primary	Female	08/21/1975	<input type="radio"/> Yes <input checked="" type="radio"/> No
Spouse ?	Male	04/01/1967	<input type="radio"/> Yes <input checked="" type="radio"/> No
Dependent 1 ?	Male	01/01/2001	

Add Dependent

4 Continue

Visit Healthcare.gov or state specific BCBS.COM site for a tax credit estimate or to apply with an official tax credit subsidy.

Save Proposal

1. If you selected **Save Proposal** from the Matching Plans screen (see previous page), a pop-up box opens so that you can enter the Proposal Name. Proposals are often saved with the client’s name but you can use any naming convention that works for you. For more on saved proposals, see page 20.
2. Select the “Save” button.

Save Proposal

Proposal Name ?

1

2 Cancel Save

Send Quote

1. If you selected **Send Quote** from the Matching Plans screen, a “Send This Quote” screen opens. Choose which plans you’d like to send.
 2. Be sure the client’s email address is correct.
 3. If you want a copy of the quote and/or proposal sent to you, select this option and check your email address for accuracy.
 4. You have the option of using a default email message with the quote or using a custom message.
 5. Your contact information is inserted at the bottom of the message by default.
 6. Clicking on the “Generate and attach a formal proposal letter” allows you to send the quote and save the proposal. We recommend this option. When you select this option, two things happen:
 - First, the Proposal Name box opens. Type a Proposal Name to save it. You can view it any time under the “Client Info” tab. For details about viewing saved proposals, see page 20.
 - Second, the “Send Quote and Save Proposal” button appears. Click on this button.
 7. If you don’t select “Generate and attach a formal proposal letter,” then you can only send the quote; the proposal isn’t saved. The Proposal Name box is hidden and the “Send Quote” button is enabled.
- For more details about how clients receive their emailed proposals/quotes, see page 21.

Send This Quote

Send a quote to your client. The quote will be available for 90 days.

What would you like to send?

Send only the 3 plans selected:
 Send all matching plans

1
Blue PPO GoldSM 001

2
Blue PPO GoldSM 002

3
Blue PPO SilverSM 003

Send this quote to your client's e-mail address:

2

Send a copy of this quote to my e-mail address:

3

Type a message to accompany the link:

4

Your personalized quote proposal is attached. For your protection, the attached proposal is password protected. The password is the primary applicant's zip code. After reviewing the proposal, please click on the following link to apply for the plan that best meets your needs:

<link>

John Agent
(123) 234-3456
john.agent@yahoo.com

5

Generate and attach a formal proposal letter 6

Proposal Name:

Proposal for Jane Doe

[View Proposal](#)

Cancel
Send Quote and Save Proposal

7

Generate and attach a formal proposal letter 7

Cancel
Send Quote

Compare Selected Plans

1. If you chose **Compare up to 3 Plans** in the matching plans screen (see page 16), a new window opens. It shows a side-by-side comparison of up to 3 plans with several plan details.
2. Click on any of the question mark icons for a more detailed definition of the feature.
3. If you want to view a PDF file of the formulary for each plan in the comparison chart, click on the "View" link.
4. To view a PDF file of the Summary of Benefits and Coverage (SBC) for each plan, click on the "Summary of Benefits" link.
5. You'll need a PDF reader to view the SBC. If you don't have one, select this link to download the free version of Adobe's PDF reader.
6. To change plans for a new comparison, click on the red "Close" button. When you select "Close," you return to the Matching Plans screen.

BlueCross BlueShield of Illinois	Blue Precision Gold HMO 101	Blue Precision Silver HMO 102	BlueCare Direct Gold 101 with Advocate
Annual Deductible (+ Individual Co-insurance Max, when applicable) Affects premium and benefits	Choose one ● \$1,750 (\$3,500)	Choose one ● \$2,600 (\$7,150)	Choose one ● \$1,750 (\$3,500)
Coverage Level Affects premium and benefits	80% Coinsurance	80% Coinsurance	80% Coinsurance
Monthly Premium*	\$470.79	\$385.71	\$423.71
Effective Date	10/1/2017	10/1/2017	10/1/2017
Zipcode	60510	60510	60510
Applicants	1	1	1
Network	Blue Precision	Blue Precision	BlueCare Direct
Coinsurance	20%	20%	20%
Individual Deductible	\$1750	\$2600	\$1750
Individual Out-of-Pocket Maximum	\$3500	\$7150	\$3500
Family Deductible	\$5250	\$7800	\$5250
Family Out-of-pocket Maximum	10500	14300	10500
Outpatient Hospital/Physician Care	60% Coinsurance after Deductible	100% Coinsurance after Deductible	80% Coinsurance after Deductible
Outpatient Hospital Services including Surgery	50% Coinsurance after Deductible	0% Coinsurance after Deductible	\$400 Copay then 40% Coinsurance after deductible
Outpatient X-rays and Diagnostic Imaging	50% Coinsurance after Deductible	0% Coinsurance after Deductible	\$80 Copay then 40% Coinsurance after deductible
Outpatient Imaging (CT/PET Scans, MRIs)	50% Coinsurance after Deductible	0% Coinsurance after Deductible	\$700 Copay then 40% Coinsurance after deductible
Inpatient Hospital Services Medical/Surgical Services	\$400 Copay then 20% Coinsurance after deductible	\$750 Copay then 20% Coinsurance after deductible	\$400 Copay then 20% Coinsurance after deductible
Inpatient Physician Services	No Charge	No Charge	No Charge
Preferred Generics	0	0	0
Non Preferred Generics	0	0	0
QHP Drug List	View	View	View
Preferred Formulary	80	80	80
Non Preferred Formulary	80	80	80
Preferred Specialty	60	60	60
Non Preferred Specialty	N/A	N/A	N/A
Download Adobe Reader to view the Summary Of Benefits for each plan	Summary Of Benefits	Summary Of Benefits	Summary Of Benefits

*Premium Amounts do not include Dental rates selected with the Major Medical plans.

Close

View Saved Proposals/Quotes

After you save a proposal or send a quote, you are directed to a page where you can view existing proposals/quotes.

1. To view a proposal/quote, select the proposal you'd like to review from the "View Existing Proposals" table. Producers often save a proposal with the name of the client.
2. You can choose to recreate the quote again by selecting the "Regenerate" link.
3. The prospect's information will display under the "View Existing Proposals" table.
4. You can also save or delete the prospect's information or create a proposal.

Home
Client Info
E-Communication
Quotes
Resources
Training

Add New Prospect

View existing Proposals

Quote	Proposal Name	Date Created	Effective Date
Regenerate 2	John West 1	9/2/2015	10/1/2015

Prospect Data 3

First Name MI Last Name

Address 1 Address 2

City State Zip Code

Home Phone E-mail Address

Work Phone Fax Cell Phone

Agent Information

Agent/Agency Name: Buss Submit W/No Agent

Broker Id: 999999999

Address: 75 Executive Drive
Aurora, IL 60507-0000

Phone Number: (630)978-7878

Assign an Agent

4
Save Prospect
Create Proposal
Delete Prospect

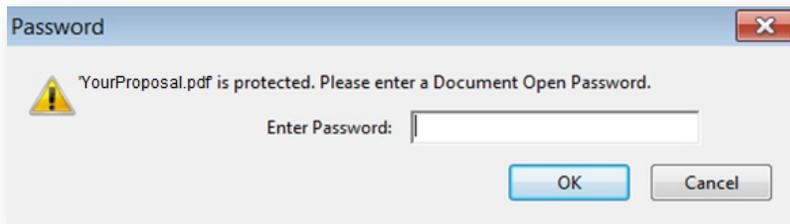
Open Emailed Quotes

After the quote is generated and sent to the client via email, the client receives an email like the one at right. The email contains the following:

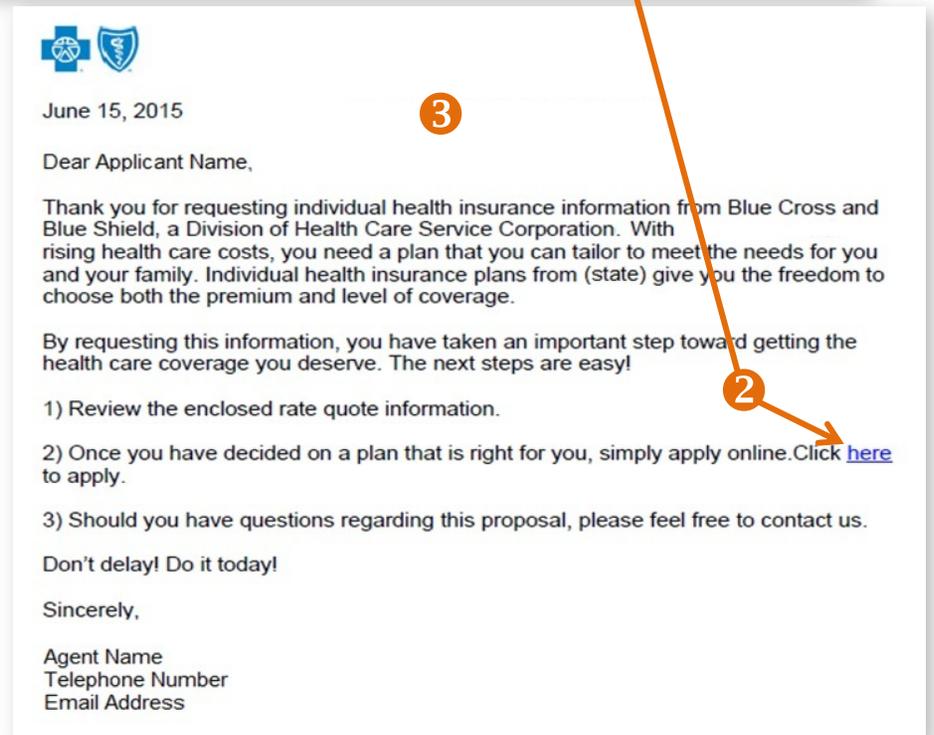
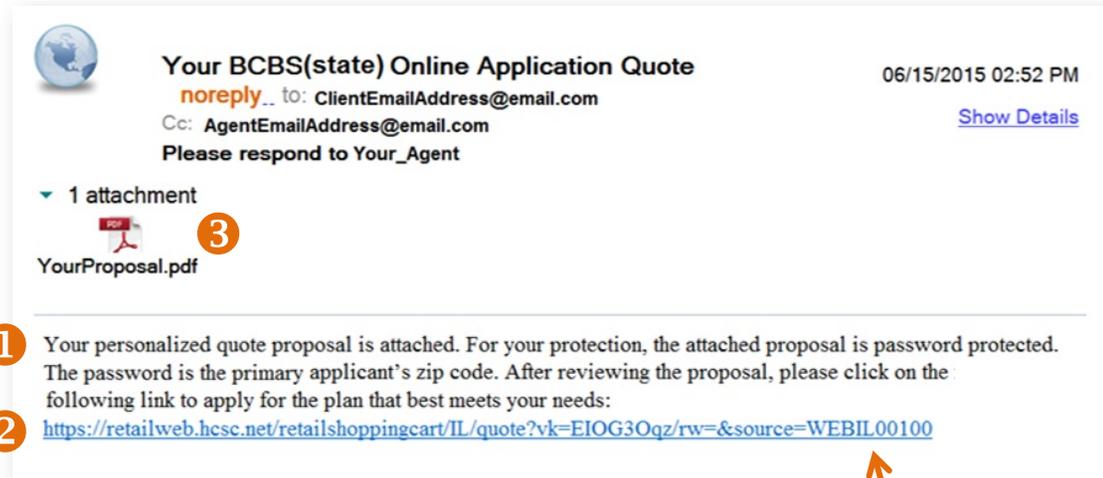
1. A custom message that you entered (see Step 4 on page 18)
2. A website link to the Retail Shopping Cart. This link is specific to you and the client and includes all of the plans that you saved for him or her. The link is included in the body of the email as well as in the PDF proposal letter.
3. A proposal letter in an attached PDF file

The Proposal PDF & Password

The Proposal (like the one at right) includes information about the quote, client demographic information and available products. It's signed with your agent info.



The proposal requires a password to open. **The password is the primary applicant's zip code.**



Open Emailed Quotes (continued)

The URL Link

The quote-specific link – whether accessed in the proposal letter PDF or accessed via the body of the proposal email – takes the client to a Retail Shopping Cart page where the plans you selected for the proposal can be viewed.

Because the client went to the Retail Shopping Cart via a link that you generated, your producer information is captured.

If the client selects a plan and applies for coverage, you are credited with the sale.

However, until your client creates a shopping account, the client must use your Express Link for every shopping session. Once your client has a Retail Shopping Cart account, you are attached to that user. See pages 23-25 for details on how to help clients set up shopping accounts.

The screenshot displays a web interface for viewing health insurance plans. At the top, an agent's information is shown: **Agent John Doe**, phone number **1-123-123-1234**, and a [View Details](#) link. A notice on the right states: "If your yearly household income is less than \$46,680, you may be able to get help paying for your health insurance. If you enrolled on healthcare.gov last year, you should update your Official Tax Credit for 2015 coverage. [Let's get started.](#)"

The main content area is titled "3 Matching Plans" and includes a "Compare Up to 3 Plans" button and a "Print" icon. A "Sort By: Monthly Premium" dropdown is also present. A "Help Me Choose" button is located above a "Check to see if your doctor is in the network" section. Below this, a checkbox labeled "View Agent Recommended plans (3)" is checked.

On the left side, there are three filter sliders:

- Monthly Premium Range:** \$160 - \$400
- Annual Deductible Range:** \$0 - \$6,250
- Individual Out of Pocket Max:** \$1,500 - \$6,600

The plan list includes the following details:

	Network	Individual Deductible	Individual Out of Pocket Maximum	Coinsurance	Office Visit Copay	Monthly Premium
<input type="checkbox"/> Bronze Plan						
<input type="checkbox"/> Blue Choice Bronze PPOSM 005	Blue Choice	\$5,000	\$6,600	80%	\$30.00	\$169.83
	Save for Later					Select
	Outline of Coverage					
<input type="checkbox"/> Silver Plan						
<input type="checkbox"/> Blue Choice Silver PPOSM 004	Blue Choice	\$3,000	\$6,350	80%	\$30.00	\$224.96
	Save for Later					Select
	Outline of Coverage					

Have Clients Create a Retail Shopping Cart Account

You should instruct the client to create a shopping account. This way, if they don't complete the application process on the day you sent the Express Link, they can complete it later. Once you are attached to the user with a Retail Shopping Cart account, **you continue to be associated with that user even if they shop for plans that were not included in your proposal.**

Create an account

User Name:*

Email Address:*

Retype Email:*

Password:*

Retype Password:*

Question:*

What is the name of the city you were born in?

My Answer:*

Would you like to be contacted by one of our representatives?

Remember me on this computer

Create Account ▶

[Forgot User Name or Password?](#)

View Your Plans: Effective Date: 10/12/2015 Zip Code: 75002 People Covered: (1)

Find Your Agent
Daily Test
Daily System Test
1-630-328-4152
[View Details](#)

3 Matching Plans [Compare Up to 3 Plans ▶](#)

[Help Me Choose ▶](#)

Check to see if your doctor is in the network

View Agent Recommended plans (3)

Plan	Network	Monthly Premium	Annual Deductible	Out of Pocket Max	Co-insurance	Agent Recommended	Price
Bronze Plan Blue Choice Bronze PPOSM 006	Blue Choice	\$6,000	\$6,000	\$6,000	100%	N/A	\$148.19 Select
Silver Plan Blue Choice Silver PPOSM 003	Blue Choice	\$6,000	\$6,000	\$6,000	100%	Agent Recommended	\$187.75 Select
Gold Plan Blue Choice Gold PPOSM 002	Blue Choice	\$1,500	\$3,500	\$3,500	80%	Agent Recommended	\$232.57 Select

Creating an Account

Creating an account is fast and easy. (See registration form at left.) Users are required to enter minimal information for an account: user name, email address, password and a security question. Note these shopping account setup tips:

- The user name field cannot contain special characters, so the email address cannot be used as the user name.
- The password must be 8-20 characters and is case sensitive. It must contain *at least one* of the following: letter, number or special character.

Have Clients Create a Retail Shopping Cart Account (continued)

Additional Retail Shopping Cart Account Tips

If the client ends a Retail Shopping Cart session before logging in or creating an account, the client must use your Express Link each time he or she returns to shop or until a shopping account is created. The same is true for clients that reach the Retail Shopping Cart via an Express Link button on your website.

The client should use the “Forgot User Name or Password” links on the Retail Shopping Cart if your client forgets login information, instead of creating a new account.



Once the Client Has a Retail Shopping Cart Account

If there is a particular plan or plans the client wants to save, they can select the “Save for Later” link. The link name will change to “Saved” and the plan will be added to the cart for viewing later.

Your producer information will be retained with the user.

When the client selects the cart icon, they may get a pop-up message regarding saved plans. Select OK.

Saved plans will be available for the client to view when they sign back in to their Retail Shopping Cart account.

<input checked="" type="checkbox"/>	Bronze Plan Blue Choice Bronze PPOSM 006 Saved	Blue Choice	\$6,000	\$6,000	100%	N/A	\$148.19 Select
	Silver Plan Blue Choice Silver PPOSM 003 Save for Later	Blue Choice	\$6,000	\$6,000	100%	\$30.00	\$187.75 Select
	Gold Plan Blue Choice Gold PPOSM 002 Save for Later	Blue Choice	\$1,500	\$3,500	80%	\$10.00	\$232.57 Select

Have Clients Create a Retail Shopping Cart Account (continued)

Access Saved Plans in Retail Shopping Cart Account

Saved plans are available for the client to view when they sign back in to their shopping account.

The image at right shows the plans saved for a future enrollment period.

The image below shows a plan saved in which the user can enroll right away. The user can simply click on the “Enroll” button to begin the online application process.

Individual & Family Saved Plans (2) My Account

The saved plans listed below are not available for purchase until open enrollment begins on November 1, 2015.

Deductible	Network	Coinsurance	Additional Coverage	Monthly Premium
\$6,750	Blue Advantage	70%	-	\$324.90
View plan details Remove from cart Compare				View more plans
<hr/>				
Blue Advantage Bronze HMO™ 006 \$6,000				
Effective Date: 01/01/2016	Zip Code: 76120	People Covered: (1)		
Deductible	Network	Coinsurance	Additional Coverage	Monthly Premium
\$6,000	Blue Advantage	100%	-	\$335.07
View plan details Remove from cart Compare				View more plans
Continue Shopping				

Individual & Family Saved Plans (1) My Account

Blue Choice Bronze PPO™ 006 \$6,000

Effective Date: 10/12/2015 Zip Code: 75002 People Covered: (1)

Deductible	Network	Coinsurance	Additional Coverage	Your Agent	Monthly Premium
\$6,000	Blue Choice	100%	-	View Details	\$148.19
View plan details Remove from cart Compare					View more plans
Continue Shopping					

5 Helping Clients Enroll

Enter Client/Applicant Information

1. Select the Quotes tab.
2. Complete the required name fields for the quote.
3. Note that a "County" field appears under the zip code after the zip code has been entered. If more than one county is available, select from the drop down list.
4. Enter all of the primary's information. Additional fields may appear, such as those for a spouse and children. Complete as needed.
5. Select the "Continue" button.

1

Home Client Info E-Communication **Quotes** Resources Training

Applicants

Primary Applicant's Name: 2 Jane MI Doe

What is the Applicant's Zip Code? 3 60502 ?

What is the Applicant's County? Dupage

Applicant's Requested Effective Date: 11/01/2017 ?

Please note: Major Medical and Dental applications must have first of the month coverage effective dates.
This information does not apply to Temporary coverage. Temporary Plans cannot have an effective date greater than 30 days in the future

Who will this health insurance plan be covering?

4 Primary Sex: Female Birthday: 08/21/1975 Tobacco Use: Yes No

Add Spouse Add Dependent

5 Continue

Select the Plan

6. If you don't need a quote or proposal, and you're helping your client enroll, select "Apply for This Plan" next to the desired plan.
7. A pop-up box will display. Click on the "Continue Online" button to enroll in the plan via the Retail Shopping Cart. This option is enabled during open enrollment.

Note that the online enrollment process will require payment before you and your client can submit the application for enrollment.

Matching Plans

1. Review the plans below
These plans best match your criteria.

2. Compare up to 3 plans
Check the boxes below up to 3 plans, then choose "Compare Selected Plans".

3. Apply online or by mail
Select the plan that interests you and apply today.

Your Options

1 Applicant(s), ZIP 60510, Kane County, Requested effective date 10/01/2017

[Return to Applicants Page](#)

Visit [Healthcare.gov](#) or state specific [BCBS.COM](#) site for a tax credit estimate or to apply with an official tax credit subsidy.

Sort By

Select One ▼

Off-Exchange & Temp Plans On-Exchange

Viewing 2 of 19 matching plans.

Filters ▼

Premium Maximum

0 562

Out of Pocket Maximum

0 7150

Annual Individual Deductible

0 7150

Co-insurance %

0 100

Blue Precision Gold HMO 101 Plan Details

Network	Deductible	Individual Out-of-Pocket Maximum	Coinsurance	Copay	Premium
Blue Precision	\$1,750	\$3,500	80	\$25	\$470.79

Dental Coverage Yes No

6 [Apply for This Plan](#)

BlueCare Direct Gold 101 with Advocate Plan Details

Network	Deductible	Individual Out-of-Pocket Maximum	Coinsurance	Copay	Premium
BlueCare Direct	\$1,750	\$3,500	80	\$25	\$423.71

Dental Coverage Yes No

[Apply for This Plan](#)

[Return to Applicants Page](#) [Save Proposal](#) [Send Quote](#) [Compare up to 3 Plans](#)

How would you like to proceed ?

Continue Online 7

It's the fast, convenient, secure way to Apply!

Print Application Sign and Mail

You or your client can complete offline.

Application will contain all information entered up to the point of printing.

Go Back

Select the Plan (continued)

The Retail Shopping Cart leads your client through all steps of the enrollment process. These steps include:

- Log in or create a Retail Shopping Cart account (this is critical – see pages 23-25 for details)
- Receiving an official tax credit for coverage if applicable
- Selecting a medical plan
- Choosing or declining a dental plan
- Agreeing to Terms and Agreements
- Entering detailed applicant and contact information
- Finding a primary care physician (PCP) or medical group if the member chooses an HMO plan

Applicants can select a PCP/medical group at a later time or producers can submit this information via the Retail Producer Portal. See pages 38-41 for details.

- Making an initial premium payment, which is required to effectuate coverage
- Choosing billing for subsequent and ongoing premium payments
- Reviewing and submitting the application

8. If the online enrollment process is closed, “Continue Online” will not be an available option. Instead, you can download an off exchange application. Select the “Print Application Sign and Mail” button to access and download a fillable PDF file version of the off exchange application.

The screenshot shows a dialog box titled "How would you like to proceed ?" with a close button (X) in the top right corner. It contains two main options:

- Continue Online**: A blue button with the text "Continue Online". Below it, the text reads: "It's the fast, convenient, secure way to Apply!"
- Print Application Sign and Mail**: A blue button with a printer icon, the text "Print Application Sign and Mail", and a red circle containing the number "8". Below it, the text reads: "You or your client can complete offline. Application will contain all information entered up to the point of printing."

At the bottom left of the dialog box is a red button with a left-pointing arrow and the text "Go Back".

6 Managing Leads

You can use the Retail Producer Portal to manage your leads and prospects by adding, saving and deleting prospect records. After they are saved, you can search for them, track them or delete them as applicable.

Add New Prospects

Follow these steps to add a new sales lead or prospect.

1. Select the "Client Info" tab.
2. To add a prospect, select "Add New Prospect" from the Client Leads box.
3. Enter at least the required information marked with a red asterisk: First Name, Last Name, State and Zip Code. The remaining fields (Address, City, Phone Numbers, Fax and Email Address) are optional.
4. Click the "Save Prospect" button. A confirmation message will display when a prospect has been successfully saved. Click the "OK" button for the confirmation message.
5. When you enter a prospect's data there is also the option to "Save and Create Proposal." Selecting this option will take you directly to the quoting screen. For details on creating quotes and proposals, see section 4, beginning on page 15.

The screenshot shows the 'Add New Prospect' form in the Retail Producer Portal. The interface includes a navigation bar with tabs: Home, Client Info (highlighted with a '1'), E-Communication, Quotes, Resources, and Training. Below the navigation bar are three main sections: Client Search, Client Leads (highlighted with a '2'), and Reporting. The Client Leads section contains links for 'Add New Prospect' and 'Search for Prospects'. The 'Add New Prospect' form is divided into two main sections: Prospect Data (highlighted with a '3') and Agent Information. The Prospect Data section includes fields for First Name*, MI, Last Name*, Address 1, Address 2, City, State* (a dropdown menu with 'IL' selected), Zip Code*, Home Phone, Work Phone, E-mail Address, Fax, and Cell Phone. The Agent Information section displays details for Jordan Taggart, including Broker Id (000624202), Address (2334 Worth Drive, Chicago, IL 60089-000), and Phone Number ((847)775-5124). There is an 'Assign an Agent' button. At the bottom of the form, there are two buttons: 'Save Prospect' (highlighted with a '4') and 'Save and Create Proposal' (highlighted with a '5'). A note at the bottom left states '* Denotes a required field.'

Search for Prospects

To search for a client, sales lead or prospect, follow these steps.

1. Select the "Client Info" tab.
2. To search for a prospect, select "Search for Prospects" from the Client Leads box.
3. Enter any piece of information to find a client. You can enter information in all four fields or just one.
4. If you want to see all of your prospects, click on the "Show All" button.
5. Click the "Submit" button.
6. Matching results will display in the lower portion of the screen.
7. To delete prospects, select the box next to their record and click the "Delete Selected Rows" button.
8. To print prospect records, select the box next to their record and click the "Print Selected Rows" button, or you can "Print All."
9. To export prospect records to a Microsoft Excel spreadsheet, select the box next to their record and click the "Export Selected Rows" button or you can "Export All."

	Last Name	First Name	Address 1	City	Zip Code	Home Phone	Work Phone	Agent/Agency Name
<input type="checkbox"/>	Barista	Katie			60601			
<input type="checkbox"/>	bob	ji			60532			
<input type="checkbox"/>	COLLIER	HANNAH			60647			
<input type="checkbox"/>	doe	john			60647	(321)837-5550		
<input type="checkbox"/>	Nilly	Willy			60606			
<input type="checkbox"/>	odom	aimée			60647			
<input type="checkbox"/>	Poppins	Mary			60601			Jordan Taggart
<input type="checkbox"/>	ramos	cristina			60647			
<input type="checkbox"/>	Rice	Amber			60532			
<input type="checkbox"/>	Rukapin	Teddy			60532			
<input type="checkbox"/>	schwein	bill			60008			

7 Searching for a Member

You can search for clients by completing fields in the Client Search section of the Retail Producer Portal's Home page. In addition, there are many other ways to search for clients from the "Client Info" tab.

Simple Search

1. Select the "Home" tab.
2. Enter a member's account number. **Searches must be done with the primary insured's information**, not a spouse's or a dependent's.
3. You can also enter the last four digits of the primary insured's Social Security Number.
4. Click the "Submit" button.
5. To do a more advanced search, click on the "Client Info" tab, where you have additional fields for searching.

The screenshot shows the 'Client Search' form in the Retail Producer Portal. The form is titled 'Client Search' and is located under the 'Home' tab. It features two radio button options: 'Account#' and 'Last 4 of SSN#'. A text input field is provided for the account number or SSN. A blue 'Submit' button is located to the right of the input field. The 'Client Info' tab is highlighted, indicating it is the active tab. A 'Show less' dropdown menu is visible in the top right corner of the navigation bar.

Advanced Options

1. Select the "Client Info" tab.

2. Enter content into one or more of the following fields for the **primary insured**:

- Client First Name
- Client Last name
- Last 4 of SSN*
- Date of Birth*
- Phone Number
- Email Address
- Zip Code
- Account Number*
- E-App Number: This is the number you receive after an electronic application is submitted through the Retail Shopping Cart.
- Client App ID: The application ID for off-exchange electronic applications sent via a web producer's integrated platform. **Only web producers use this ID.**
- Exchange Assigned ID: The number from the Marketplace after an on-exchange application is submitted.
- Pending Application ID: The six-character value that appears under **Billing ID** on an initial payment due notice sent to an applicant.

3. Once you have entered your desired search criteria, click the "Search" button.

* Searching by a member's Social Security Number (last 4 digits), Date of Birth or Account Number will provide the best results.

View Search Results

Results from a client search will be displayed on the lower portion of the page. Click on the Account Number hyperlink shown in the results table.

Last Name	First Name	E-App Number	E-App Started	E-App Submitted	Group Number	Account Number	Status	Product Name	App. Received
TEST	TEST					123456789	Active	Blue Precision Silver HMO SM 002	12/05/2014

When you select the Account Number link, the member's demographic information is displayed:

- Account Number
- Name
- Address
- Email Address
- Home Phone
- Cell Phone
- Work Phone
- Spouse Cell Phone
- Fax

8 Producer-Assisted Transactions

There are several ways you can help clients via features and functions in the Retail Producer Portal. You have the ability to get temporary and permanent ID cards for both medical and dental policies into the hands of clients. You can also change Primary Care Physicians and member contact information. When you submit these requests, other member systems are subsequently updated.

Order Permanent ID Cards

You can order permanent ID cards for mail delivery from the Client Detail page in your portal account.

Marketplace (on exchange) policies require at least 24 hours after application submission before ID cards are available. For non-Marketplace (off exchange) policies, ID cards are often available right away.

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Generate ID Cards" from the dropdown menu and click the "GO" button.
2. Choose "Permanent ID Cards."
3. Click the "Next" button.

The screenshot displays the 'Client Detail' page in the Retail Producer Portal. At the top, there is a search bar and two buttons: 'Back to Search Results' and 'Submit E-Question'. A dropdown menu is open, showing 'Generate ID Cards' selected, with a 'GO' button next to it. Below this is a 'Client Information' section with fields for Account Number, Name, Address, E-mail Address, Home Phone, Cell Phone, Work Phone, Spouse Cell Phone, and Fax. At the bottom, there is a 'Policy Fulfillment Request' section with radio buttons for 'Temporary ID Cards' and 'Permanent ID Cards', and a 'Next' button.

Order Permanent ID Cards (continued)

4. Select the policy type. You can select an ID card for a medical or dental policy.
5. For plans that require a Primary Care Physician (PCP), select the member needing the card. Each member selected receives a separate ID Card with his or her own PCP information. For plans that don't require a PCP, you don't have to select a member's name. For these cards, only the primary insured's name is included.

Policy Fulfillment Request Detail Screen - Permanent IDs

Mailing Address: 123 Main St., Suite 2100, Naperville, IL 60563

Alternate Address:

Address 1: 123 E Warrenville, City: Warrenville, Zip: 60555 0501, Country: US

Address 2: Suite 1000, State: IL, County: DuPage

Reason for ID Card Request: **Lost Card**

Blue Precision Gold HMO - Sam Spouse - Primary Insured

PCP/MG	Effective
<input checked="" type="radio"/> 220 - DuPage Medical Group	2/1/2014
<input type="radio"/> 111 - Dreyer Medical Group	3/1/2014

Number of ID Cards Requested: 1

Blue Precision Gold HMO - Kelly Kid - Dependent 1

PCP/MG	Effective
<input checked="" type="radio"/> 220 - DuPage Medical Group	2/1/2014

Number of ID Cards Requested: 1

Policy Fulfillment Request Policy and Member Selection Screen - Permanent IDs

Please select the policy:

	Effective Date	Termination Date
<input type="radio"/> Blue Precision Platinum PPO & Blue Select Dental	01/01/2013	11/30/2013
<input type="radio"/> Blue Precision Platinum PPO	12/01/2013	12/31/2013
<input type="radio"/> Blue Select Dental	12/01/2013	12/31/2013
<input type="radio"/> Blue Precision Silver PPO	01/01/2014	01/31/2014
<input checked="" type="radio"/> Blue Precision Gold HMO		

Members:

<input type="checkbox"/> Priscilla Name (Primary)	02/01/2014	12/31/9999
<input checked="" type="checkbox"/> Sam Spouse (Spouse)	02/01/2014	12/31/9999
<input checked="" type="checkbox"/> Kelly Kid (Child)	02/01/2014	12/31/9999
<input type="checkbox"/> Charlie Kid (Child)	02/01/2014	12/31/9999
<input type="checkbox"/> Select All		

Buttons: Cancel, Back, Next

6. For Permanent ID Cards, you can order cards for mail delivery. The cards will be delivered by the United States Postal Service. You have the option of selecting the address on file for the member or entering in an alternate address for the ID Card mailing.
7. Be sure to choose a reason for replacing the ID Card.

Generate Temporary ID Cards

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Generate ID Cards" from the dropdown menu and click the "GO" button.
2. Choose "Temporary ID Cards"
3. Click the "Next" button.
4. Select a policy.
5. For plans that **require** a Primary Care Physician, you must select the member needing the ID Card. Each member selected receives a separate ID Card with the Primary Care Physician information included.

For plans that **do not require** a Primary Care Physician, you do not have to select a member's name. For these ID Cards, only the primary insured's name is on the ID Card.

Click on the member's link to generate the ID Card.

The screenshot displays a multi-step process for generating temporary ID cards. It starts with a search results page where 'Generate ID Cards' is selected from a dropdown menu and the 'GO' button is clicked. This leads to a 'Policy Fulfillment Request' screen where 'Temporary ID Cards' is selected. The user then clicks 'Next' to reach a 'Policy Fulfillment Request Policy and Member Selection Screen - Temp IDs'. On this screen, a policy is selected from a list, and then a specific member (Priscilla Name) is chosen to generate the ID card.

	Effective Date	Termination Date
<input type="radio"/> Blue Precision Platinum PPO & Blue Select Dental	01/01/2013	11/30/2013
<input type="radio"/> Blue Precision Platinum PPO	12/01/2013	12/31/2013
<input type="radio"/> Blue Select Dental	12/01/2013	12/31/2013
<input type="radio"/> Blue Precision Silver PPO	01/01/2014	01/31/2014
<input checked="" type="radio"/> Blue Precision Gold HMO		
Priscilla Name (Primary)	02/01/2014	12/31/9999
Sam Spouse (Spouse)	02/01/2014	12/31/9999
Kelly Kid (Child)	02/01/2014	12/31/9999
Charlie Kid (Child)	02/01/2014	12/31/9999

Generate Temporary ID Cards (continued)

6. Temporary ID Card requests will generate a file that allows the user to "Print" or "Download" the ID Card. If you download and save Temporary ID Card files, you can then email the files to clients. If clients are with you, you can print the files and hand it to them before they even leave your office.
7. Once the downloading or printing is completed, you can select "Finish" to go back to the member's information page.

Print **Download** **6**

BlueCross BlueShield

Date: March 11, 2015

Dear Provider,

Please accept this letter as a temporary Blue Cross and Blue Shield identification card.

According to the information on file, the following individual(s) have Blue Cross and Blue Shield coverage:

Subscriber:	Identification Number:
Medical Group Number: IB2001	Eff.date: 03/01/2015
Dental Group Number: D20033	Eff. date: 03/01/2015

DEPENDENT INFO:

This letter does not guarantee coverage or payment and does not represent prior approval for benefits.
All claims are subject to coverage provisions and medical necessity.

To verify eligibility and product information, call (800) 538-8833.

ATTENTION PROVIDER: This Temporary ID will automatically expire within 30 days after the date of its issuance. If you are providing services to this enrollee or his/her dependent after the expiration date, please call the information contained in this letter is still accurate.

Cross and Blue Shield plan.

Policy Fulfillment Request Policy and Member Selection Screen - Temp IDs

Please select the policy: (Click on the member's name to generate their Temporary ID card)

	Effective Date	Termination Date
<input checked="" type="radio"/> Blue Advantage Silver HMO 004	02/01/2015	12/31/9999
	02/01/2015	12/31/9999

Cancel **Back** **Finish** **7**

Change Primary Care Physician

The Retail Producer Portal allows you to make a Primary Care Physician (PCP) change for a client.

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Change PCP" from the dropdown menu and click the "GO" button.
2. When the "Provider Change" screen opens, select the member name needing the PCP change.
3. Click on the "Provider Finder" link. Locate the Medical Group / PCP/ PCPA / NPI number(s) for the new PCP.
4. Put a check mark in the box(es) beside the name(s) of the members needing the PCP change.
5. Put the Medical Group / PCP/ PCPA / NPI number in the appropriate field.
6. Select the "Search" button. See the following page for next steps.

The screenshot displays the Retail Producer Portal interface. At the top, there are navigation tabs: Home, Client Info, E-Communication, Quotes, Resources, and Training. A "Client Search" section is visible with a search box containing "000000001" and a "Submit" button. Below this, a dropdown menu is open, showing options: "Select Transaction", "Change PCP", and "Contact Info Change". A red circle with the number "1" highlights the "Change PCP" option. A "GO" button is also visible.

The "Client Information" section shows fields for Account Number, Name, Address, E-mail Address, Home Phone, Cell Phone, Work Phone, Spouse Cell Phone, and Fax. A red circle with the number "2" is placed over the "Change PCP" option in the dropdown menu.

The "Provider Change" screen is shown below, with a "Provider Change Options" section containing a dropdown menu set to "Active Member(s)" and a "GO" button. A red circle with the number "3" is placed over the "GO" button. To the right, there is a link: "To find a Doctor click Provider Finder".

The "Active Member(s)" section contains a table with the following data:

Member	Plan	DOB	Effective Date	Termination Date	History
<input checked="" type="checkbox"/> UATILCURRENTPLAN UATILFUTUREPLAN (Primary)	Blue Precision Gold HMO SM 001	01/01/1971	05/01/2015	12/31/9999	
<input checked="" type="checkbox"/> UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse)	Blue Precision Gold HMO SM 001	01/01/1981	05/01/2015	12/31/9999	

A red circle with the number "4" is placed over the checkmarks in the "Member" column.

The "Provider Search" section contains a "Medical Group / PCP / PCPA / NPI Number" field with a red circle with the number "5" over it, an "Effective Date" field with "08/01/2015", a "Term Date" field with "12/31/9999", and a "Search" button with a red circle with the number "6" over it. A "Cancel" button is also visible.

Change Primary Care Physician (continued)

1. After you click the "Search" button, the new PCP information is displayed.
2. Choose a reason for changing provider(s) from the "Provider Change Reason" dropdown list located in the Provider Assignment section. For a list of reasons, see page 41.
3. Click the "Validate" button.
4. If the reason selected is not valid, an error message will display at the bottom of the page and a new reason selection must be made.

Change Primary Care Physician (continued)

5. If you do not receive an Error message, verify the PCP changes are correct
6. Select the "Finish" button.
7. A message appears that the change was successful and new ID Cards were generated.

Provider Change

Provider Change Confirmation

John Doe (primary)

	Current	Updated
Medical Group #	597	<input checked="" type="checkbox"/> 124
Medical Group Name	BCBS HMO ILLINOIS	<input checked="" type="checkbox"/> ADVOCATE LUTHERAN GENERAL PHYS PARTNERS
Effective Date	07/01/2015	<input checked="" type="checkbox"/> 08/01/2015
Term Date	12/31/9999	12/31/9999
Request Received Date	06/10/2015	<input checked="" type="checkbox"/> 07/30/2015
Provider Assigned By	Selected by member	Selected by member
Provider Change Reason	No Reason Given	<input checked="" type="checkbox"/> Concern With Service

Jane Doe (spouse)

	Current	Updated
Medical Group #	597	<input checked="" type="checkbox"/> 124
Medical Group Name	BCBS HMO ILLINOIS	<input checked="" type="checkbox"/> ADVOCATE LUTHERAN GENERAL PHYS PARTNERS
Effective Date	06/01/2015	<input checked="" type="checkbox"/> 08/01/2015
Term Date	12/31/9999	12/31/9999
Request Received Date	05/22/2015	<input checked="" type="checkbox"/> 07/30/2015
Provider Assigned By	Selected by member	Selected by member
Provider Change Reason	Data Entered Incorrectly	<input checked="" type="checkbox"/> Asked Out

Provider Change (Member ID:)

Success:
The transaction was successful and all applicable ID cards were requested.

Back Cancel Finish & Re-Launch Finish

Change Primary Care Physician (continued)

PCP Changes

Each client's PCP can only be updated one time, per transaction. Reasons for changing a PCP include:

- Referral problems
- Retired
- New member benefit not supported
- No reason given
- New enrollee
- Member preferred one doctor for family
- Member's former provider in network
- Doctor/medical group location
- Left network (closed)
- Hospital affiliated
- Dependent age
- Concern with service
- Change of residence
- Concern with physician
- Concern with access
- Asked out

Provider Termination Dates

You don't need to enter a termination date for the new PCP. The termination date will automatically default to December 31, 9999. The new PCP assignment will remain in effect until the member makes another change or until coverage ends. Please do not alter the date.

Selecting Two PCPs

A client may have a PCP for one period of time and another PCP effective on a future date. (Example: PCP 1 is effective from October 1 to December 31, and PCP 2 is effective from January 1 onward.) If the client wants two different PCPs for two different time periods, you will need to complete two separate PCP update transactions. Examples of when this might take place are when a PCP is leaving a network or when a client is moving to a new policy/network in the future.

Effective Dates for PCPs

In some instances, depending on the state, an effective/start date for a PCP can only be on the first of the month. In those cases, a "Warning Message(s)" will display. You may click "Accept" or "Modify" if you wish to change the effective date of the new PCP selection.



Change Client Information

Producers have the ability to change contact information – phone numbers and email addresses – on their clients’ behalf. When submitted, these changes are updated in our member systems **in approximately 4 hours**.

Producers do not have access to change the contact information of spouses or dependents*. They can only change contact information for the primary insured. After updating an email address or telephone number, allow up to 4 hours for the client information to refresh in the Retail Producer Portal.

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Contact Info Change" from the dropdown menu and click "GO".
2. Make all applicable contact info changes. When adding a telephone number, select an option from the "Type" drop down list. If an existing telephone number does not have a designated type, make a selection now or an error message will display when you click the "Next" button.
3. Click the "Next" button.

* **NOTE: A dependent under the age of 18 is required to use the telephone number and email address of the primary insured.**

The screenshot shows the Retail Producer Portal interface. At the top, there are navigation tabs: Home, Client Info, E-Communication, Quotes, Resources, and Training. A 'Client Search' section is visible with a search bar containing '000000001' and a 'Submit' button. Below this, there is a 'Client Information' section with a dropdown menu for 'Select Transaction' and a 'GO' button. The 'Contact Info Change' modal is open, displaying the client's name 'TANYA WASHINGTON (Primary)' and fields for 'Phone Number' (Type, Home Phone Number, 10 digit Phone Number, ext) and 'Email Address' (Email). The 'Next' button is highlighted with a green arrow.

Change Client Information (continued)

4. Confirm changes are correct.
5. Select "Finish."
6. A message should appear that the updates were successfully saved.
7. If there is an issue, an error message will display. Follow instructions and click the "OK" button.

Contact Info Change Confirmation

Name: TANYA WASHINGTON (Primary)

Phone Number

Current				Updated			
Type	Phone Number	Extension	Send Text	Type	Phone Number	Extension	Send Text
Home Phone Number	(123) 123-6677		No	Cellular Phone Number	(123) 123-4455		No
EmailAddress	IL@SDF.COM				AGEN@AGEN.COM		

Please verify the changes made. If the information is correct, select "Finish" to complete the workflow and save the changes made. If the information is not correct, please select "Back" to make changes.

Cancel < Back Finish

Your updates were successfully saved.

Your request was unsuccessful.

Error(s) from MemberManagement service:

- UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse): No change to the existing record

Please contact IT Help Desk (312) 653-6675.

Click OK to continue.

OK

9 Using Reports

The reporting functions in the Retail Producer Portal continue to expand.

Producers can choose from a variety of options to create and run reports.

In addition, producers can save the report parameters and view them at any time.

This section of the guide covers the following:

- Select Report Options
- Creating and Saving Custom Reports
- Viewing Custom Reports
- Examples of Frequently Used Reports
- Using Book of Business Reports (Agencies only)

The screenshot displays the 'Create Report' interface within the Retail Producer Portal. At the top, there are navigation tabs: Home, Client Info, E-Communication, Quotes, Resources, and Training. A 'Show less' link is visible on the right. Below the navigation, there are three main sections: 'Client Search' (with a magnifying glass icon), 'Client Leads' (with options to 'Add New Prospect' and 'Search for Prospects'), and 'Reporting' (with options to 'Create Report' and 'View My Custom Reports').

The 'Create Report' section is the primary focus, containing several filter options:

- eApp Start Date
- Policy Term Date
- App Received Date
- App Signature Date
- Current Paid to Date
- Coverage Issue Date
- Coverage Effective Date
- Members Approaching 65
- Members Approaching 26

Below these filters, there are two date input fields: 'From MM/DD/YYYY' and 'To MM/DD/YYYY'. Further down, there are dropdown menus for 'Application Status' and 'Policy Status', both currently set to 'Select One'. There are also radio button options for 'Product Name' (On Exchange, Off Exchange, Grandfathered, Non-Grandfathered, Medical Only, Dental Only, Temporary Plans, Both Medical And Dental) and a text input field for 'All selected'. On the right side, there are text input fields for 'Producer First Name', 'Producer Last Name', and 'Nine Digit Producer Number'. At the bottom, there are four buttons: 'Clear All' (red), 'Go to My Custom Reports' (blue), 'Save as Custom Report' (blue), and 'Submit' (blue).

Select Report Options

1. Click on "Client Info."
2. Select the "Create Report" link in the Reporting section.
3. Create a report by selecting parameters in one of the reporting sections. See the following pages for details on each report type, which are divided into four types of reports:
 - Section 1: Date-Driven Reports (page 46)
 - Section 2: Retention Reports (page 46)
 - Section 3: Application Status Reports (page 47) and Policy Status Reports (page 48)
 - Section 4: Producer Reports (page 48)
4. Click the "Clear All" button to remove all selections made on the page.
5. Click the "Submit" button to pull the report using the report parameters you selected.

The screenshot displays the 'Create Report' interface in the Retail Producer Portal. The navigation bar at the top includes 'Home', 'Client Info' (marked with a circled '1'), 'E-Communication', 'Quotes', 'Resources', and 'Training'. Below the navigation bar are three main sections: 'Client Search', 'Client Leads', and 'Reporting'. The 'Reporting' section contains a 'Create Report' link (marked with a circled '2') and a 'View My Custom Reports' link. The 'Create Report' section (marked with a circled '3') is divided into four sections:

- Section 1:** Date-Driven Reports, featuring radio buttons for 'eApp Start Date', 'App Signature Date', 'Coverage Effective Date', 'Policy Term Date', 'Current Paid to Date', and 'App Received Date'. It includes 'From' and 'To' date input fields.
- Section 2:** Retention Reports, featuring radio buttons for 'Members Approaching 65' and 'Members Approaching 26'.
- Section 3:** Application Status and Policy Status Reports, featuring dropdown menus for 'Application Status' and 'Policy Status', and radio buttons for 'Product Name' (On Exchange, Off Exchange, Grandfathered, Non-Grandfathered, Medical Only, Dental Only, Temporary Plans, Both Medical And Dental). It includes an 'All selected' checkbox.
- Section 4:** Producer Reports, featuring text input fields for 'Producer First Name', 'Producer Last Name', and 'Nine Digit Producer Number'.

 At the bottom of the form are four buttons: 'Clear All' (marked with a circled '4'), 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit' (marked with a circled '5'). An orange arrow points from the 'Policy Status' dropdown in Section 3 to the 'Clear All' button.

Section 1: Date-Driven Reports

1. Select one option from the following report types:

- eAPP START DATE: displays information about electronic applications that have been started.
- POLICY TERM DATE: displays the dates that member policies were terminated due to a variety of reasons, including non-payment.
- APP RECEIVED DATE: displays all applications received within a date range.
- APP SIGNATURE DATE: displays the dates members signed their applications.
- CURRENT PAID TO DATE: displays the “paid to” dates of member policies.
- COVERAGE ISSUE DATE: displays all applications issued within a date range.
- COVERAGE EFFECTIVE DATE: displays the dates member policies become effective.

The screenshot shows a user interface for selecting a report type. A red box labeled '1' encloses a group of radio buttons: eApp Start Date, Policy Term Date, App Received Date, App Signature Date, Current Paid to Date, Coverage Issue Date, and Coverage Effective Date. Below this, a red box labeled '2' encloses two date input fields: 'From MM/DD/YYYY' and 'To MM/DD/YYYY'.

2. Enter a “From” and/or “To” date. There’s a convenient dropdown calendar for selecting these dates. If you do not select a “To” date, today’s date will be applied.

3. Click on the “Submit” button. Note that only the primary applicant data is pulled.

Section 2: Retention Reports

1. Select one option to view those who might be ready for a new policy.

- The MEMBERS APPROACHING 65 report displays members turning 65 years of age within the next 365 days. Both primary and spouse data are pulled. Help keep members Blue by finding these members a Medicare Supplement policy, Medicare Advantage with Prescription Drug coverage policy (MAPD) or stand-alone Prescription Drug Plan (PDP).
- The MEMBERS APPROACHING 26 report displays members who are turning 26 within the next 365 days. Members approaching 26 that are on family policies as dependents will need their own individual policies.

The screenshot shows two radio button options: 'Members Approaching 65' and 'Members Approaching 26'.

2. Click on the “Submit” button.

Section 3: Application Status Reports

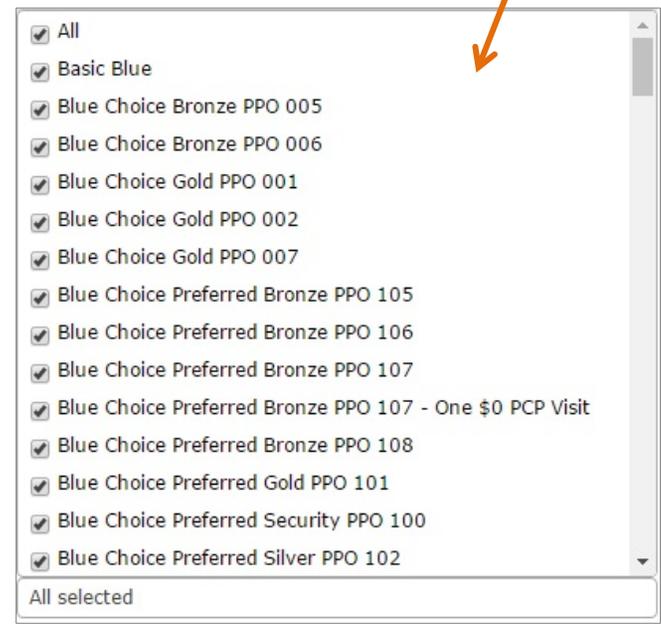
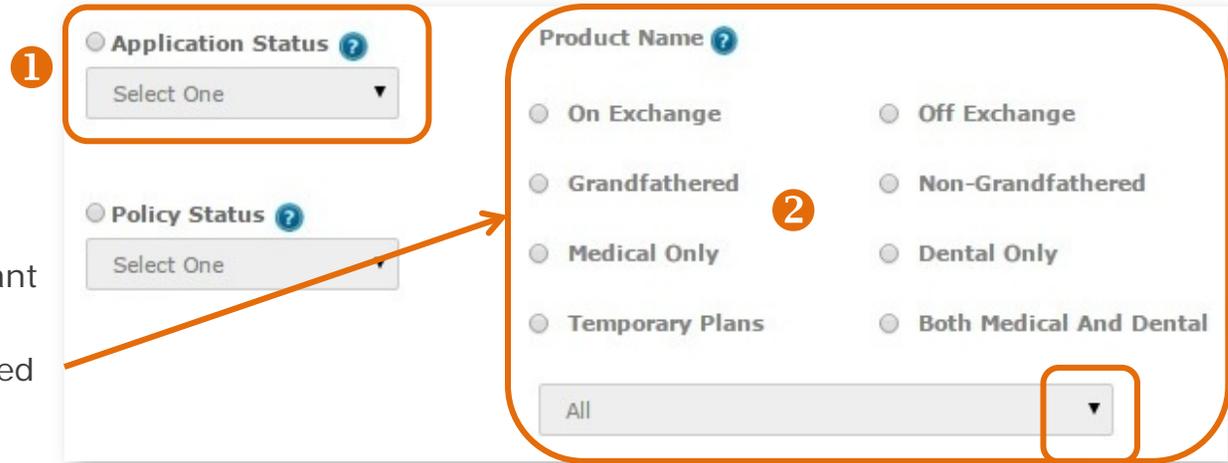
1. For application reports, select the “Application Status” radio button and select one of the following from its dropdown menu:

- All
- Started
- Pending / In Progress
- Withdrawn

Note that only the primary applicant data is pulled.

2. You can select (but are not required to) an additional filtering report option from the “Product Name” section if you like:

- Use the “All” pull down menu to select one product or multiple products. For example, you could use the multiple plan selection option to choose plans for a specific metallic, network or plan type.
- ON EXCHANGE: displays members with On Exchange policies.
- OFF EXCHANGE: displays members with Off Exchange policies.
- GRANDFATHERED: displays members with a non QHP policy. Options will populate for states with active members.
- NON-GRANDFATHERED: displays members with a QHP policy but it is not a metallic policy. Options will populate for states with active members.
- MEDICAL ONLY: displays members who only have medical policies, not dental policies.
- DENTAL ONLY: shows members who only have dental policies, not medical policies.



- TEMPORARY PLANS: displays members who have temporary (short-term) policies
- BOTH MEDICAL AND DENTAL: displays members who have a medical and dental policy.

Note that all of these options are available for both “Application Status” and “Policy Status” reports (see below). You must select from the “Application Status” or “Policy Status” dropdown menu before you can choose an additional filtering option from the “Product Name” section.

3. Click on the “Submit” button.

Section 3: Policy Status Reports

1. For policy reports, select the “Policy Status” radio button and select one of the following from its dropdown menu:

- All
- Grace Period
- Termed
- Active
- Missing Binder Payment

The screenshot shows two main sections: "Application Status" and "Policy Status". The "Policy Status" section has a dropdown menu with "Select One" and is circled in red with a "1" in a red circle. The "Product Name" section is also circled in red with a "2" in a red circle. It contains radio buttons for "On Exchange", "Off Exchange", "Grandfathered", "Non-Grandfathered", "Medical Only", "Dental Only", "Temporary Plans", and "Both Medical And Dental". Below these is a dropdown menu set to "All".

2. You can select an additional filtering report option from the “Product Name” section if you like. See descriptions of these options listed on page 47 and at the top of this page.

3. Click on the “Submit” button.

Section 4: Producer Reports

The options for this report only displays for General Agents and Agencies. Subproducers don’t have access to these reports. Select report options for Section 1, 2 or 3 and then enter producer/subproducer data in Section 4 to see producer-specific reports. For example, to pull active members for a specific producer or subproducer, select “Policy Status” from Section 3, then “Active” in the dropdown menu and enter a subproducer’s nine-digit ID number.

The screenshot shows three input fields: "Producer First Name", "Producer Last Name", and "Nine Digit Producer Number". Each field has a question mark icon next to it.

Create & Save Custom Reports

1. Select the "Create Report" link from the Reporting section of the Client Info tab.
2. Select your reporting parameters. In this example, the report being created is for all active off exchange policies.
3. Click the "Submit" button.
4. Select the "Save as Custom Report" button.
5. A pop-up box opens allowing you to create a name for the report.
6. Click the "Save" button to save the custom report.

The screenshot shows the 'Create Report' form with the following elements:

- Navigation:** Home, Client Info, E-Communication, Quotes, Resources, Training, Show less
- Reporting Section:** Client Search, Client Leads, Reporting (with 'Create Report' button highlighted by a red box and a '1' callout).
- Create Report Form:**
 - Filters: eApp Start Date, App Signature Date, Coverage Effective Date, Policy Term Date, Current Paid to Date, Initial Payment Not Received, Members Approaching 65, Members Approaching 26.
 - From/To date pickers (MM/DD/YYYY).
 - Application Status: Select One (highlighted by a red box and a '2' callout).
 - Policy Status: Active (highlighted by a red box).
 - Product Name: On Exchange, Grandfathered, Medical Only, Temporary Plans, Off Exchange (highlighted by a red box), Non-Grandfathered, Dental Only, Both Medical And Dental.
 - Buttons: Clear All, Go to My Custom Reports, Save as Custom Report (highlighted by a red box and a '4' callout), Submit (highlighted by a red box and a '3' callout).

The 'Save Custom Report' dialog includes:

- Title:** Save Custom Report
- Report Name:** All Active Off Exchange (highlighted by a red box and a '5' callout).
- Buttons:** Cancel, Save (highlighted by a red box and a '6' callout).

View Custom Reports

After saving custom reports, you can run them again at any time. You can save up to 10 custom reports.

1. Select "View My Custom Reports" from the Reporting section of the Client Info tab.
2. Click on the "Run Report" button to see refreshed data.
3. If you've saved 10 reports and need to save another, one saved report will need to be deleted by clicking on the "Remove" button before a new report can be added.

The screenshot displays the Retail Producer Portal interface. At the top, there is a navigation bar with tabs: Home, Client Info, E-Communication, Quotes, Resources, and Training. Below this, there are three main sections: Client Search (with a magnifying glass icon), Client Leads (with links for 'Add New Prospect' and 'Search for Prospects'), and Reporting (with links for 'Create Report' and 'View My Custom Reports'). The 'View My Custom Reports' link is highlighted with an orange box and a circled '1'. Below these sections is a 'My Custom Reports' section. It contains a heading 'My Custom Reports' and a paragraph: 'Use the Create Report Page to create and save custom search reports. You can save up to 10 reports for future use. This page will allow you to Run or Remove your custom report once it is saved.' Below the text, there is a report titled 'All Active Off Exchange'. To the right of the report title are two buttons: 'Run Report' (circled with a '2') and 'Remove' (circled with a '3').

Examples of Frequently Used Reports

Pending Applications and Applications Needing Binder/Initial Payment

You can run a report of submitted *on-exchange and off-exchange* qualified health plan applications that still require that important initial payment. To create a report of those needing to pay their first premium, follow these steps:

1. Go to the "Client Info" tab
2. Click on the "Create Report" link from the Reporting section.
3. Select "Application Status" and choose "Pending / In Progress" from the dropdown menu.
4. Select additional filtering options from the "Product Name" section (optional).
5. Click "Submit".
6. Then, export your data. See page 55 for details on exporting data from your reports.
7. Repeat steps 1 and 2 above.
8. Select "Policy Status" and choose "Missing Binder Payment" from the dropdown menu. Repeat steps 4-6. These two reports will give you a complete picture of those needing support to get their applications completed and their policies effectuated.

The screenshot displays the 'Create Report' interface in the Retail Producer Portal. The navigation bar at the top includes 'Home', 'Client Info' (selected), 'E-Communication', 'Quotes', 'Resources', and 'Training'. Below the navigation bar are three main sections: 'Client Search', 'Client Leads', and 'Reporting'. The 'Reporting' section contains a 'Create Report' button, which is highlighted with an orange box and a circled '2'. The 'Create Report' form includes several filter sections: 'Application Status' (dropdown menu, circled '3'), 'Policy Status' (dropdown menu, circled '8'), 'Product Name' (radio buttons for 'On Exchange' and 'Off Exchange', circled '4'), and 'Members Approaching 65' and 'Members Approaching 26'. There are also date pickers for 'From' and 'To'. At the bottom of the form are buttons for 'Clear All', 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit' (circled '5').

Examples of Frequently Used Reports (continued)

Multiple Plan Names

You can select as many or as few plan names as needed from the product name drop down list for a report.

1. Select the "Create Report" link from the Reporting section of the Client Info tab.
2. Select "Policy Status" and choose, from the drop down list: All, Grace Period, Termed, Active or Missing Binder Payment.
3. Click on the product name drop down list. Select multiple plan names. In this example, all dental plans are chosen. You could use this feature to select by metallic level, network, product type and much more.
4. Click the "Submit" button.

You can select as many or as few plan names as needed from the drop down list. What's more, you can save the report parameters and run the report in the future at any time.

The screenshot displays the 'Create Report' interface. At the top, there is a navigation bar with tabs: Home, Client Info, E-Communication, Quotes, Resources, and Training. Below this, there are three main sections: Client Search, Client Leads, and Reporting. The Reporting section is highlighted with a red box and a '1' in a red circle, indicating the 'Create Report' link. The 'Create Report' form is shown below, with a 'Policy Status' dropdown menu highlighted with a red box and a '2' in a red circle. The dropdown menu is open, showing a list of plan names, with 'BlueCare Dental 1A', 'BlueCare Dental 1B', 'BlueCare Dental 4 Kids 1A', and 'BlueCare Dental 4 Kids 1B' selected, highlighted with a red box and a '3' in a red circle. At the bottom of the form are buttons for 'Clear All', 'Go to My Custom Reports', 'Save as Custom Report', and 'Submit', with the 'Submit' button highlighted with a red box and a '4' in a red circle.

Using Book of Business Reports

Book of Business reports are available to all General Agents and Agencies that have subproducers.

For General Agents and Agencies with this access, they can select the Book of Business link from the Reporting section of the Client Info tab. Other producers will not see the “Book of Business” link.

You can search and create reports for a specific producer by using the producer’s nine-digit producer number (as shown at right). You can also search your entire hierarchy. Additional options allow you to include subproducers, include dental business and filter by premium status. Filtering by premium status can be used for client outreach as non-payment can jeopardize coverage.

You have several options sorting data as shown in the table at right.

Note that only the first 1000 rows will display when the “Search” button is clicked. However, *all* results will be included when you click on the “Export All” or “Print All” buttons.

	Premium Status	Primary Last Name	Primary First Name	Account Number	Status	Product Name	Coverage Effective Date	Paid To Date	Term Date	Renewal Type	Producer Name	Nine Digit Producer Number
<input type="checkbox"/>	Initial Premium Not Received	WASHINGTON	KATHRYN	0011223344	ACTIVE	BlueCare Direct Silver 102 with Advocate	06/01/2017	06/01/2017	12/31/9999	NONE	AAA AGENCY	111222333
<input type="checkbox"/>	Initial Premium Not Received	THOMAS	BEN	0011223355	ACTIVE	Blue Cross Blue Shield Premier 101, a Multi-State Plan	06/01/2017	06/01/2017	12/31/9999	NONE	AAA AGENCY	111222333
<input type="checkbox"/>	Initial Premium	RAMOS	CHRISTINE	1122334466	ACTIVE	Blue Choice	06/01/2017	06/01/2017	12/31/9999	NONE	AAA AGENCY	111222333

Exporting Reports

It's easy to print and/or export some or all of the data from any report.

1. Export Selected Rows:

Select the rows that you'd like to export and click on the "Export Selected Rows" button. The data you selected is automatically saved to a Microsoft Excel

spreadsheet file with the default filename of "AdvancedSearchResults.xls" and is downloaded to your computer's download folder. Open the file and save it with an appropriate name to the location needed.

2. Print Selected Rows: Select the rows that you'd like to print. Then click on the "Print Selected Rows" button. All of the data that you selected will appear in print preview. Select the "Print" link in the top right corner to send the data to your printer. If you have Adobe Acrobat, you can also save the data to a PDF file.

3. Export All: All of the data in the table is automatically saved to a Microsoft Excel spreadsheet file with the default filename of "AdvancedSearchResults.xls" and downloaded to your computer's download folder. Open the file and save it with an appropriate name to the location needed.

4. Print All: Click "Print All" and all of the data in the table will appear in a print preview screen. Select the "Print" link in the top right corner to send the data to your printer. If you have Adobe Acrobat, you can also save the data to a PDF file.

1000 of 3501 Search Results
The search results exceed 1000 records. Please select additional filters to narrow your results or Export All or Print All to view search results

Items Per Page: 25

Previous 1 2 3 4 5 ... 40 Next

	Last Name	First Name	Record Type	E-App Number	E-App Started	Group Number	Account Number	Status	Product Name	Product Type	App. Received	Issue Date	Coverage Effective Date	Paid To Date
<input type="checkbox"/>	WASHINGTON	MARY	Application	0100300865	9/26/2017	IB2602		Started	Blue Choice Preferred Bronze PPO 105	OFF-EXCHANGE	9/26/2017			
<input type="checkbox"/>	ADAMS	SARA	Application	0100300865	9/26/2017	DI2603		Started	BlueCare Dental 4 Kids 1A	OFF-EXCHANGE	9/26/2017			
<input type="checkbox"/>	JEFFRESON	TOMAS	Application	0100300256	9/21/2017	IB2605		Started	Blue Precision Bronze HMO 103	OFF-EXCHANGE	9/21/2017			
<input type="checkbox"/>	MADISON	DAVID	Application	0100300259	9/21/2017	IB2605		Started	Blue Precision Bronze HMO 103	OFF-EXCHANGE	9/21/2017			

Items Per Page: 25

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10 Managing Documents & Questions

Upload a Document

You can submit documents via the portal in the following file types:

- PDF
- JPG
- JPEG
- PNG
- GIF
- TIF
- BMP

All file types listed above, except for PDFs, are different types of image files. PDFs are typically created using Adobe Acrobat or Adobe Reader software.

You can upload a file up to 10 MB (or 10,000 KB) in size.

To reduce the size of an image file, lessen the resolution during scanning. Typically, JPG, JPEG, PNG and GIF image files are smaller in file size than TIF and BMP image files.

Upload a Document (continued)

To upload a document, Select the E-Communication tab and follow these steps:

- In the "Document Submission" area, click on the "Document Submission" link.
- An "Account Number" is optional.
- The "E-App Number" field is also optional. You can submit documents for OFF EXCHANGE policies not yet effectuated.
- Select an option from the "Document Type" drop down box:
 - ✓ Bank Draft Authorization
 - ✓ Coverage changes
 - ✓ New Business Application
 - ✓ Other Documents
 - ✓ Outstanding Requirements
 - ✓ Rollover Application
 - ✓ SEP Documentation
 - ✓ Temporary Coverage Application
 - ✓ Upgrades/Add Dependents
- Click the "Browse" button and navigate to the file's location. Select it. The filename will populate the "Location and Filename" field.
- Click the "Submit" button.
- You will then receive a Document Submission confirmation message. It displays the file name and tracking number you should retain for your records. Click the "OK" button.

The screenshot shows the 'Document Submission' form in the Retail Producer Portal. The form is titled 'Document Submission' and is part of the 'E-Communication' tab. It contains several fields: 'Account Number' (optional), 'E-App Number' (optional), 'Document Type' (required, dropdown menu), and 'Location and Filename' (required, with a 'Choose File' button). A 'Submit' button is at the bottom right. A confirmation message is overlaid on the form, stating 'Document Submitted' and 'The document 161585.pdf has been submitted. Your tracking number is # 11111.'

View Document Submissions

1. To view your documents, select the “E-Communication” tab.
2. Click on the “View Submitted Documents” link.
3. Submitted documents are displayed in a list format. The list provides a history only; documents cannot be viewed or accessed once submitted.
4. To delete a document submission, click the box next to the document in the list and select the “Delete Selected Rows” button. A message appears asking if you’re sure if you want to delete the message. Click the “OK” button to confirm.

The screenshot shows the 'E-Communication' tab selected in the navigation menu. Under the 'Document Submission' section, the 'View Submitted Documents' link is highlighted with an orange box. Below this, the 'My Submitted Documents' section displays a table with one document entry. A 'Delete Selected Rows' button is visible next to the document entry.

#	Tracking #	Document Type	Account #	Submitted
1	122892	New Business Application		2/10/2015 10:49 AM

Submit a General E-Question

1. Select the “E-Communication” tab.
2. Choose the “New E-Question” link.
3. Select the “General E-Question” option for general questions not related to a specific member.
4. Enter a “Subject.”
5. Post your question.
6. Click on the “Submit” button.

The screenshot shows the 'E-Communication' tab selected in the top navigation bar. Below the navigation bar, there are two main sections: 'E-Questions' and 'Document Submission'. The 'E-Questions' section has a 'New E-Question' link highlighted with a red box. The 'Document Submission' section has 'Document Submission' and 'View Submitted Documents' links. Below these is the 'Submit E-Question' form. The form has a heading 'Submit E-Question' and a sub-heading 'Please select type of E-Question'. There are two radio buttons: 'General E-Question' (selected) and 'Member Specific E-Question'. Below the radio buttons is a paragraph: 'To submit an e-question, fill in the form below and submit your request. You will receive notification once the e-question is received and processed.' There are two input fields: 'Subject *' and 'Question * (Max limit of 1000 characters)'. The 'Submit' button is at the bottom right.

Submit a Member-Specific E-Question

1. Select the "E-Communication" tab.
2. Choose the "New E-Question" link.
3. Select the "Member Specific E-Question" option for questions related to a specific member.
4. Enter the required information for the member/client.
5. Enter a "Subject."
6. Post your question.
7. Click on the "Submit" button.
8. You'll receive a confirmation message. Click the "OK" button.

E-Question Submitted

Your E-Question regarding John Public has been submitted.
Your tracking number is #EQU398.

Go to My E-Questions
OK

Home
Client Info
E-Communication
Quotes
Resources
Training
Show less ^

E-Questions

▶ New E-Question

▶ View My E-Questions

Document Submission

▶ Document Submission

▶ View Submitted Documents

Submit E-Question

Please select type of E-Question

General E-Question
 Member Specific E-Question

To submit an e-question, fill in the form below and submit your request. You will receive notification once the e-question is received and processed.

Client's First Name *

MI

Client's Last Name *

Client ID# *

Subject *

Question * (Max limit of 1000 characters)

* Denotes a required field

Submit

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Delete an E-Question

If you submitted an E-Question that is no longer relevant or is incorrect, you can easily delete it.

1. Select "E-Communication" tab.
2. Choose the "View My E-Questions" link.
3. Select the box beside the E-Question you want to delete.
4. Select the "Delete Selected Rows" button.
5. When the confirmation box appears, click "OK."

The screenshot shows the 'E-Communication' tab selected in the top navigation bar. Under the 'E-Questions' section, the 'View My E-Questions' link is highlighted with a red box. Below this, the 'My E-Questions' section displays a table with two rows. The second row, 'Having RPP Issues', is selected with a checkbox. The 'Delete Selected Rows' button is highlighted with a red box. The table has the following data:

#	Subject	Status	Submitted	Responded	Client ID	Client Name	Tracking #
1	Needs ID Card	In Progress	08/07/2015 01:47 PM		1231231234	Jane Doe	EQU29960
2	Having RPP Issues	In Progress	08/07/2015 01:46 PM				EQU29959

Below the table, the 'Delete Selected Rows' button is highlighted with a red box. The page also shows pagination controls and a note: 'Please note that a closed E-Question will be permanently deleted after 60 days.'

The page at <https://osc.hcsc.net> says:

Are you sure you want to delete the selected row/s?

OK Cancel

11 Changing Account Information

The Edit Profile feature enables you to change your agency listing information or account password.

Edit Your Profile

If you accidentally set up your profile with wrong information, or need to change it for any reason, follow these steps.

1. Click on "Account," located in the top right area of the Retail Producer Portal application window.
2. Select the "Edit Profile" option menu item from the dropdown list.
3. Update any of the following information:
 - Company Name
 - Address
 - Phone
 - Email Address

You **cannot** edit your Name or nine-digit producer ID number.

4. Once complete, click on the "Update Profile" button. A message appears that your profile has been updated. Click the "Back to Profile Page" button.

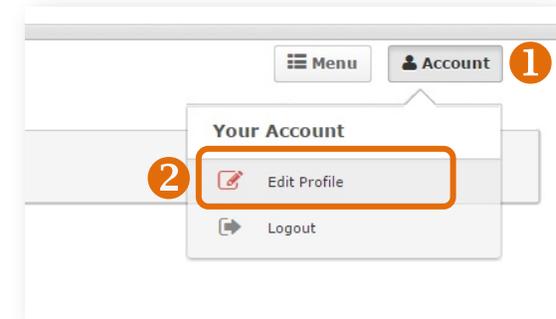
The screenshot shows the 'Edit Profile' page with the following fields and options:

- Account Menu:** Located in the top right corner, containing 'Menu' and 'Account' (callout 1).
- Your Account Dropdown:** A dropdown menu below the 'Account' link containing 'Edit Profile' (callout 2) and 'Logout'.
- Edit Profile Form:**
 - First Name:** Producer
 - Last Name:** Name
 - Company Name:** Your Company Name (callout 3)
 - Address 1:** Your address
 - Address 2:** Your address
 - City:** Your City
 - State:** Your State
 - Zip Code:** Your Zip Code
 - Phone:** Your telephone #
 - E-mail Address:** Your email address
 - Agent Unique ID:** Set default Line of business (Major Medical selected, Medicare Supplement unselected)
 - Call Between:** Three empty input fields
 - Update Profile Button:** A green button at the bottom (callout 4).

* Denotes a required field.

Change Your Password

1. Click on "Account," located in the top right area of the Retail Producer Portal application window.
2. Select the "Edit Profile" option menu item from the dropdown list.
3. Enter your current password.
4. Enter your new password.
 - The password must be six to nine characters.
 - The password can only contain letters and/or numbers; no special characters.
 - If you select letters, the letters can be lower case, upper case or a mix of both.
5. Confirm your new password.
6. Click on the "Update Password" button.
7. After updating your password, a message appears that your profile has been updated. Click the "Back to Profile Page" button.



Change Password

Click "Update Password" to save the new password.

Once the password has been changed you will be required to login using your new password.

Current Password *

3

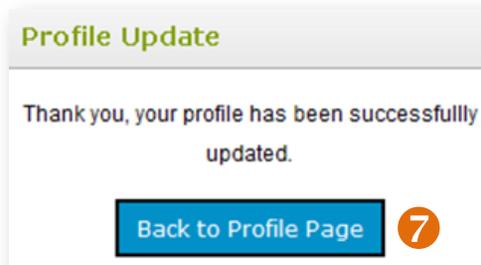
New Password * ?

4

Confirm New Password *

5

Update Password **6**



12 Contact Information & Resources

Producer Services for Major Medical

Illinois	888-313-5526
Montana	855-454-7109
New Mexico	888-222-0572
Oklahoma	888-399-9394
Texas	888-697-0679
State Farm Agents	877-699-5849

Producer Services for Medicare Supplement

Illinois	800-538-0382
Montana	855-258-8475
New Mexico	800-307-8144
Oklahoma	800-522-9266
Texas	800-366-4236

Producer Service Center

The Producer Service Center supports our producers on issues around:

- Producer of record corrections and change requests
- Commissions
- Appointments and licensing
- MAPD/PDP certifications and FFM registration
- Account changes such as address, phone number and email address

Contact the Producer Service Center at **855-782-4272** or by email at Producer_Service_Center@hcsc.net.

Most issues can be resolved via our online producer services tool. Log into **Blue Access for ProducersSM** and click on the “Producer Services” link for options.