



**BlueCross. BlueShield.**

**Illinois • Montana • New Mexico  
Oklahoma • Texas**

## OVER 65 PRODUCER Line of Business Tools

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# Overview: Medicare Line of Business Tools

## 1. Scope of Appointment (SOA):

Select this link to access the form that must be completed before MAPD/PDP appointments.

## 2. Applications & Membership:

This tool allows you to view and access incomplete online applications, view and track the progress of all submitted applications and see details about members/clients.

## 3. Plan Select & Enroll:

The online quoting, application and submission process allows for real-time processing and faster enrollments. In addition, it automatically links your information to your client's application.

## 4. Product Information:

This links to Medicare Supplement, MAPD and PDP product information.

## 5. Express Link:

Here you can access a URL specific to you for use when emailing clients. When a client selects the link with the embedded code, it ensures your information is attached to your client's shopping and enrollment experience.

## 6. Certify to Sell:

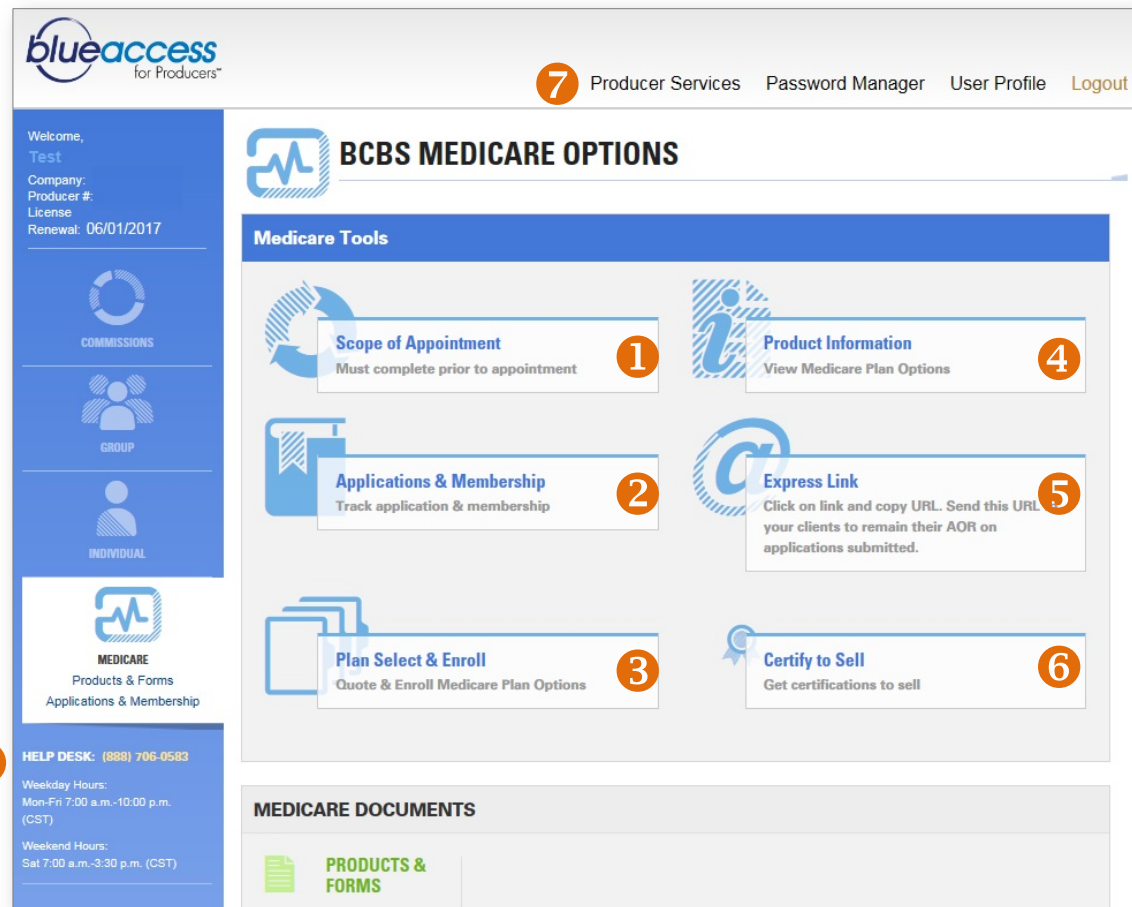
If you aren't certified to sell MAPD and PDP, select this icon to access certification information.

## 7. Producer Services:

This gives you the opportunity to submit basic Producer Administration questions.

## 8. Help Desk:

Every page of Blue Access for Producers includes Help Desk contact information.



Be sure to complete a new SOA form before every MAPD and PDP client appointment.

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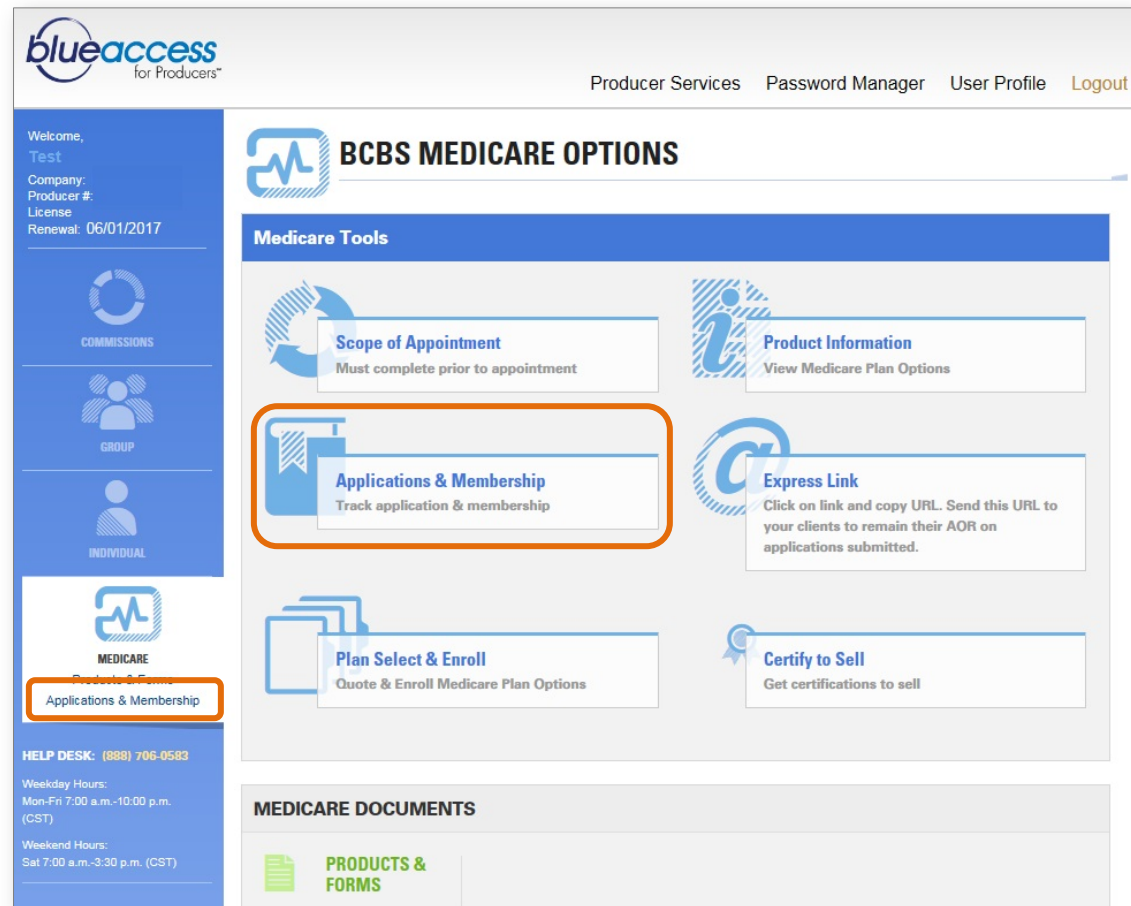
# 2. Applications & Membership Tracking Tool

### Overview

The **Application & Membership** tracking tool will allow you to view the status for all MAPD, PDP and Medicare Supplement applications started and submitted online via the **Plan Select & Enroll** tool (see section 3) as well as the membership status for all of your active MAPD, PDP and Medicare Supplement clients, regardless of enrollment method.

This tool allows you to view and access incomplete online applications so that you can contact clients and continue the enrollment process. In addition, you can view all submitted online applications and track progress. Submitted applications are saved for easy downloading. Membership functions allow you to see detailed information about your clients.

Only the writing producer/subproducer can see initiated and submitted applications and membership data associated with his or her own personal producer ID number. General agents and agencies cannot access this data for their associated producers/subproducers in this tool.




### Incomplete Applications

The **Incomplete Applications** tab will allow you to see all of the Medicare Supplement, MAPD and PDP online applications linked to you that have been started but still must be completed and submitted.

If an application is incomplete, simply click on your client's name to:

1. Get your client's contact information
2. See an application summary
3. Click on the blue **Resume Application** button to continue the enrollment process
4. Delete incomplete applications that will not be submitted by clicking on the trash can icon under the **Delete** header



### Applications & Membership


INCOMPLETE APPLICATIONS

SUBMITTED APPLICATIONS

MEMBERSHIP

#### Incomplete Applications

Below is a list of applications that have not been submitted. Please review and complete your applications, or delete them if they are not valid.

CLIENT	ZIP CODE	PRODUCT	LAST MODIFIED	DELETE
<a href="#">Doe, John</a> (312) 545-4545	60647	Blue Cross MedicareRx (PDP) Value	Aug 25, 2015	

1

#### Applicant Info

**Name:** Doe, John  
**Phone:** (312) 545-4545  
**Zip:** 60647  
**App Origin:** Online  
**Product Type:** PARTD

2

#### Plan Info

**Product Type:** Blue Cross MedicareRx...  
**Coverage Start Date:** 2016-01-01  
**Status:** Incomplete  
**Date Modified:** Aug 25, 2015

3

[Resume Application](#)

[Close](#)

[Alonso, Jose](#) (545) 554-8845	60647	Blue Cross MedicareRx (PDP) Basic	Aug 25, 2015	
[Lincoln, Abraham](#) (321) 256-5555	60647	Standard Plan F PPO	Aug 25, 2015	
[Washington, Sylvia](#) (321) 254-5454	60647	Blue Cross Medicare Advantage Basic HMO	Aug 25, 2015	

Only applications initiated online are displayed in the “INCOMPLETE APPLICATIONS” tab.



### Submitted Applications


The **Submitted Applications** tab displays all of the Medicare Supplement, MAPD and PDP applications submitted online that are linked to your producer ID number.

When you click on a client's name you can:

1. See the applicant's name and contact information
2. View a summary of the plan selected
3. Track the application status:
  - In Progress
  - Submitted
  - Pending
  - Complete
  - Canceled
  - Disenrolled

4. Download a PDF file of the finished submitted application.

5. See the last time the submitted application was modified by our processing teams. Note that the submitted application data is enabled for new applications. Historical data is not displayed.


**Applications & Membership**

INCOMPLETE APPLICATIONS
SUBMITTED APPLICATIONS >
MEMBERSHIP

#### Submitted Applications

CLIENT ▼	ZIP CODE	PRODUCT	STATUS	LAST MODIFIED
<a href="#">Bruce Leroy</a> (312)123-1234	60601	MAPD Basic HMO	Pending	01/01/2015
<div> <div> <b>1</b> <b>Applicant Info</b>                      Name: <b>Bruce Leroy</b>                      Phone: <b>(312) 123-4567</b>                      Zip: <b>60601</b>                      App ID: <b>123457</b>                      App Origin: <b>Fax</b>                      Receipt Date: <b>01/10/2015</b> </div> <div> <b>2</b> <b>Plan Info</b>                      ProductType: <b>MAPD</b>                      Product Name: <b>Basic HMO</b>                      Coverage Start Date: <b>01/01/2016</b>                      Coverage End Date: <b>01/01/2016</b>                      Status: <b>Pending</b> </div> <div> <b>3</b> <b>Reason - RFI</b>                      This application has been stopped and requires more information. Please contact 1-800-XXX-XXXX.                 </div> <div> <b>4</b> <span>Download PDF</span> <span>Close</span> </div> </div>				
<a href="#">Angie Balut</a> (312)123-1234	60601	MAPD Basic HMO	In Progress	01/01/2015
<a href="#">Michael Johns</a> (312)123-1234	60601	MedSupp Premier Plus HMO-POS	Complete	01/01/2015
<a href="#">John Robert</a> (312)123-1234	60601	PDP Choice Plus PPO	Cancelled	01/01/2015
<a href="#">Mary Jill</a> (312)123-1234	60601	MedSupp Premier Plus HMO-POS	Disenrolled	01/01/2015

**Only applications submitted online are displayed in the "SUBMITTED APPLICATIONS" tab. Applications submitted via fax and mail are not displayed.**

### Membership

The information in the **Membership** tab displays all of your Medicare Supplement, MAPD and PDP clients, regardless of how the member enrolled (online, mailed and faxed applications).

When you first click on the Membership tab, you'll see a general overview list of your clients, their products and the application status and coverage dates. If you click on a client's name, you'll see even more details about that specific client:

1. Contact information
2. Application information
  - Identification Number
  - Application Origin
  - Receipt Date
3. Member Number
4. Plan Information
5. Coverage Start and End Dates
6. Paid To Date

Welcome, Jordan  
Company: Jordan Taggart  
Producer #: 000624202  
License Renewal

Home > Membership

**Applications & Membership**

INCOMPLETE APPLICATIONS SUBMITTED APPLICATIONS **MEMBERSHIP**

**Membership**  
Below is a list of your confirmed members.

CLIENT	ZIP CODE	PRODUCT	STATUS	COVERAGE DATES
A, A (312) 225-5588	60056	MEDICARE PDP IL Basic Plan - 0% Subsidy	Terminated	START: 01/01/2016 END:
C, A (630) 723-6788	60502	MED SUPP IL Standard Plan A	Terminated	START: 03/14/2016 END:

**Applications & Membership**

INCOMPLETE APPLICATIONS SUBMITTED APPLICATIONS **MEMBERSHIP**

**Membership**  
Below is a list of your confirmed members.

CLIENT	ZIP CODE	PRODUCT	STATUS	COVERAGE DATES
Castillo, Lorenzo (575) 589-1235	88063	MED SUPP NM-Standard Plan F	Active PAID: 01/01/2017	START: 04/01/2014 END:

**Applicant Info**

1 Name: Lorenzo Castillo

2 Phone: (575) 589-1235

3 Zip: 88063

App ID: N/A

App Origin: Faxed

App Receipt Date: 03/14/2014

Member Number: 870999208

**Plan Info**

4 Product Type: Med Supp

Product Name: NM-Standard Plan F

5 Coverage Start Date: 04/01/2014

Coverage End Date: N/A

Status: Active

Date Modified: 11/02/2016

6 Paid To Date: 01/01/2017

Close

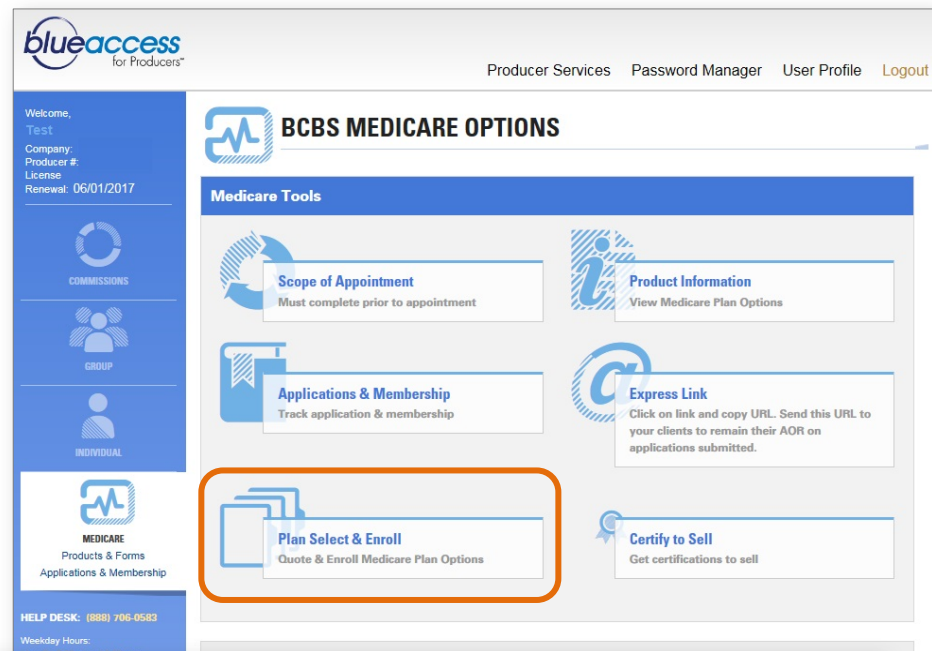
### 3. Plan Select & Enroll

You can access the online enrollment application process for Medicare Supplement, MAPD and PDP plans from Blue Access for Producers.

The online enrollment process provides form-entry validation throughout each step of the process. The front-end validation ensures more accurate and quicker transfer of information downstream, resulting in much faster turnaround times.

While you can still complete paper apps, online enrollments are faster and more error-proof. What's more, online applications can be tracked in the [Application & Membership](#) tool.

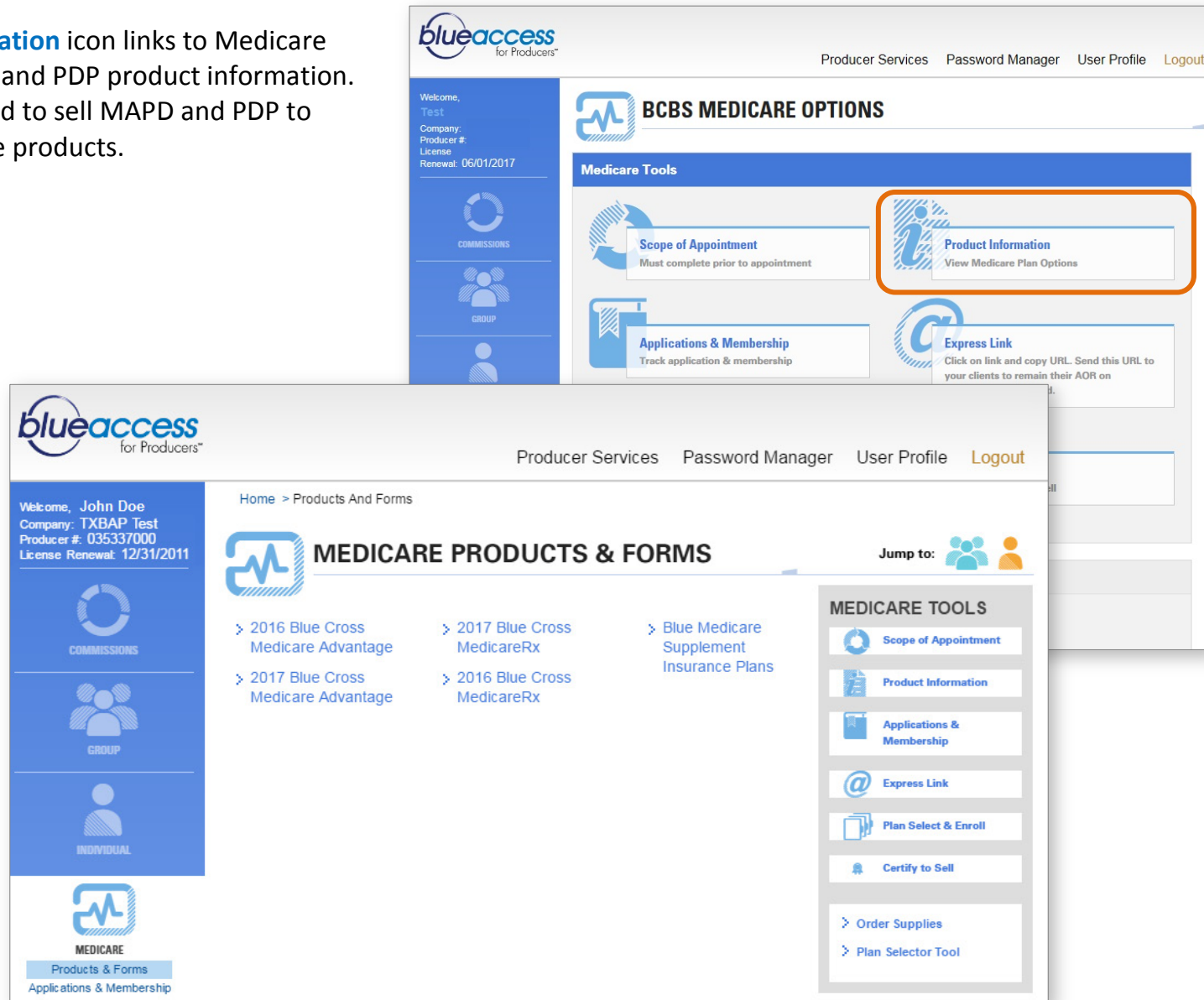
When you click on the [Plan Select & Enroll](#) icon, a new shopping window opens. Simply follow the prompts and enter required information. If you don't complete the application, you can save it and return to it later through the [Application & Membership](#) tracking tool.

The screenshot displays the 'MEDICARE HEALTH INSURANCE QUOTE' form. It includes fields for 'Effective Date' (01/01/2016), 'Zip Code' (60601), and 'County' (Cook). Below these, a section titled 'I'd like to shop for:' contains fields for 'Sex' (Male), 'Date of Birth' (Month: January, Day: 1, Year: 1940), and a checkbox for 'I am shopping with an applicant and have captured a Scope of Appointment Document'. A 'Next' button is located at the bottom right. On the left side of the form, there is a sidebar with links to 'Find the right insurance plan for you', 'Explore insurance plan options', 'Get help shopping', 'Save plans', 'Apply for insurance plans', 'SHORT TERM PLANS', 'INDIVIDUAL & FAMILY PLANS', and 'BCBS MEDICARE OPTIONS'.



# 4. Product Information

The **Product Information** icon links to Medicare Supplement, MAPD and PDP product information. You must be certified to sell MAPD and PDP to have access to these products.



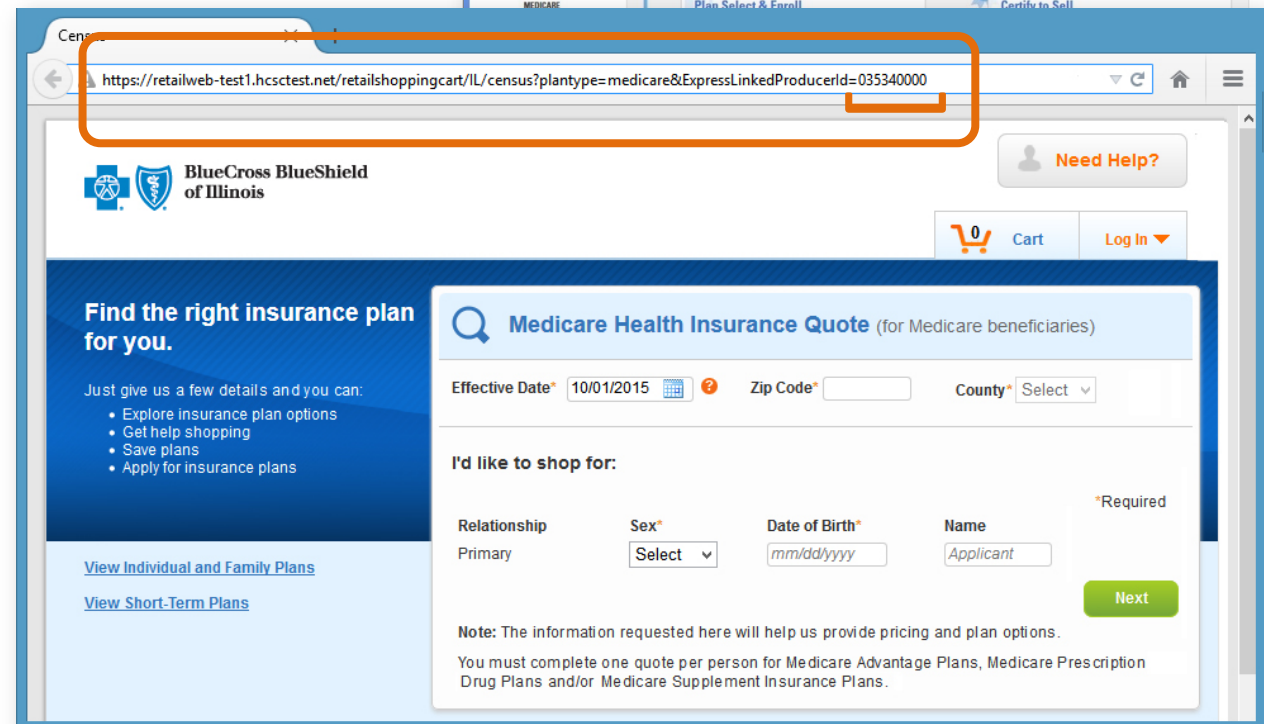
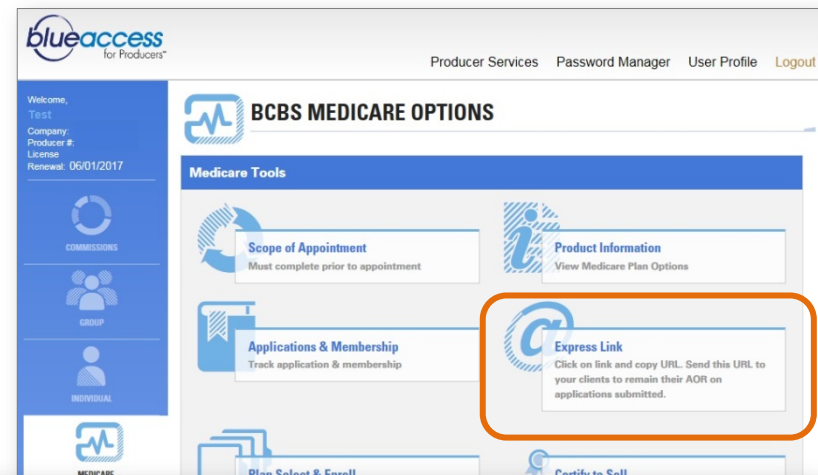
# 5. Express Link

There are two pathways to enrolling your client in an over 65 product that automatically links you to a client's application:

- **The producer pathway.** You access the online enrollment process via the **Plan Select & Enroll** icon through your Blue Access for Producers account.
- **The subscriber pathway.** Your client accesses the online enrollment application via your **Express Link** code, received by your client in an email.

Express Link is a URL or web address link that's specific to you. While the link takes users to our online shopping experience for over 65 products, it's embedded with your 9-digit producer number and attaches your information to their shopping and enrollment experience.

To get started, select the **Express Link** icon. A shopping cart window opens. Your producer-specific URL will be displayed in the address bar of the browser window. Note that the URL shown in the image at right contains a Producer ID number. Your link will include *your* ID number. Copy your URL and paste it into an email that's addressed to your client. When your client clicks on the link to begin shopping, your information will be captured.



# 6. Certify to Sell

If you are not certified to sell MAPD and PDP policies, simply select the **Certify to Sell** icon for details on the certification process.

The top screenshot shows the 'BCBS MEDICARE OPTIONS' page. The 'Certify to Sell' button is highlighted in an orange box. The bottom screenshot shows the 'MEDICARE PRODUCTS & FORMS' page. The 'Certify to Sell' button is also highlighted in an orange box. The bottom screenshot provides detailed information about the 2017 Blue Cross Medicare Options MAPD/PDP Certification Process, including a link to the curriculum and a list of required courses and exams.

**blueaccess** for Producers™

Producer Services Password Manager User Profile Logout

Welcome, Test  
Company: Portal Demo  
Producer #: 000kdemo  
License Renewal: 05/01/2017

**BCBS MEDICARE OPTIONS**

**Medicare Tools**

**Scope of Appointment**  
Must complete prior to appointment

**Product Information**  
View Medicare Plan Options

**Express Link**  
Click on link and copy URL. Send this URL to your clients to remain their AOR on applications submitted.

**Certify to Sell**  
Get certifications to sell

**blueaccess** for Producers™

Producer Services Password Manager User Profile Logout

Welcome, BROKER  
Company: Portal Demo  
Producer #: 000kdemo  
License Renewal: 05/01/2016

**MEDICARE PRODUCTS & FORMS**

**Certify to Sell Products**

The 2017 Blue Cross Medicare Options MAPD/PDP Certification Process is now available!

Please use this link (<http://hcsc.cmpsystem.com>) to access both Part 1 and Part 2 of the curricula and receive the **discount rate of \$125 (\$50 off of the original \$175 AHIP fee)**. You must use this link to receive the discount.

Please ensure that you complete all 2017 Blue Cross Medicare Options MAPD/PDP certification requirements prior to marketing and/or selling any 2017 MAPD/PDP plans.

**Producers will need to complete the following courses and exams:**

**Part 1: AHIP Curriculum** Discounted Link

- Medicare Basics
- Medicare Marketing Rules and Regulations
- Fraud, Waste and Abuse (FWA)
- Final Exam
- General Compliance Attestation

**User ID:** National Producer Number (NPN), no leading zeroes  
**Password:** User creates

**Part 2: HCSC/CMP Curriculum** Discounted Link

- Sales Agent Requirements course
- MAPD/PDP Product course/exam
- Producer or Agency Certification form
- Producer or Agency Amendment (does not apply to sub-producers)
- Attestation forms

**HELP DESK:** (888) 706-0583  
Weekday Hours: Mon-Fri 7:00 a.m.-10:00 p.m. (CST)  
Weekend Hours: Sat 7:00 a.m.-3:30 p.m. (CST)

## 7. Producer Service Request Tool

You can submit and track requests for service for a variety of common producer administration inquiries. Here's how:

1. Select the **Producer Services** link to access the service tool.
2. Click on the **Request Assistance** icon.
3. Select a service area for assistance. They cover:
  - Submitting commission inquiries
  - Making Producer of Record changes (not applicable for MAPD and PDP policies)
  - Changing your Electronic Funds Transfer information
  - Updating your contact information
  - Changing your password or security challenge question
  - Submitting errors and omissions insurance documentation
  - Updating affiliation information
4. Select the **Existing Request Tickets** icon to track the progress of your submitted issues.

The screenshot displays the Blue Access for Producers interface. At the top, the 'Producer Services' link is highlighted with a red box and the number 1. On the left sidebar, the 'Request Assistance' icon is highlighted with a red box and the number 2. In the main content area, the 'Request Assistance' section is shown, with a list of service options. The 'Updating my Electronic Funds Transfer (EFT) info' option is highlighted with a red box and the number 3. Below this, the 'Existing Request Tickets' section is shown, with the 'Existing Request Tickets' icon on the sidebar highlighted with a red box and the number 4. The 'Existing Request Tickets' section displays a table of open request tickets.

**Request Assistance**

You can submit your request by selecting from the list of options below.

- > Locating missing commissions
- > Updating my Blue Access for Producers password
- > Updating my producer of record (POR)
- > Updating my challenge question
- > Updating my Electronic Funds Transfer (EFT) info
- > Updating my E&O documentation
- > Updating my contact info
- > Updating my Affiliation Documentation

Please note, if you need to update the information below, it will require a phone call to the Producer Service.

**Existing Request Tickets**

Below is a list of your request tickets that are still open. Request tickets that have been resolved are considered closed and will no longer be displayed.

Date	Ticket Number	Request Type	Status
09/25/2015 1:43 PM	1-68757371	EFT	Open
09/25/2015 1:42 PM	1-68758311	EFT	Assigned to FS-C - Adjustment
09/25/2015 1:39 PM	1-68758301	POR	Open

## 8. Service & Support

### **Internet Help Desk**

To contact the Blue Access for Producers internet Help Desk, call **888-706-0583**, Monday through Friday, 7 a.m. to 10 p.m. CT and Saturday, 7 a.m. to 3:30 p.m. CT.

### **Over 65 Producer Help Desk**

For producer support with Medicare Supplement, MAPD and PDP enrollments, benefits and disenrollments, call **888-723-7423**, 8 a.m. to 5 p.m. CT.