New Broker Appointment

2023

Begin

Begin

Introduction

This job aid will walk you through the process of:

- ❑ Registering/Creating an Account & Logging In
- ❑ Starting an Appointment Application
- ❑ Signing & Uploading Documents
- ❑ Reviewing a Submitted Application

Begin

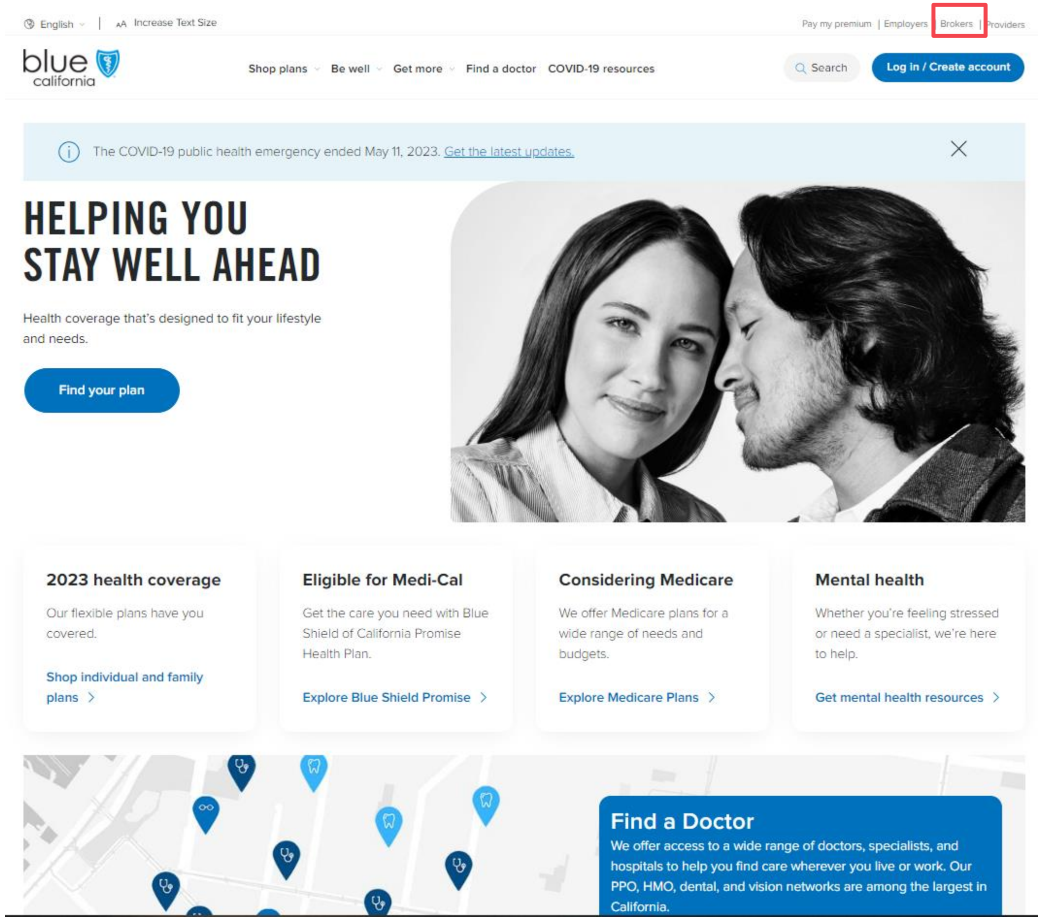
Creating an Account

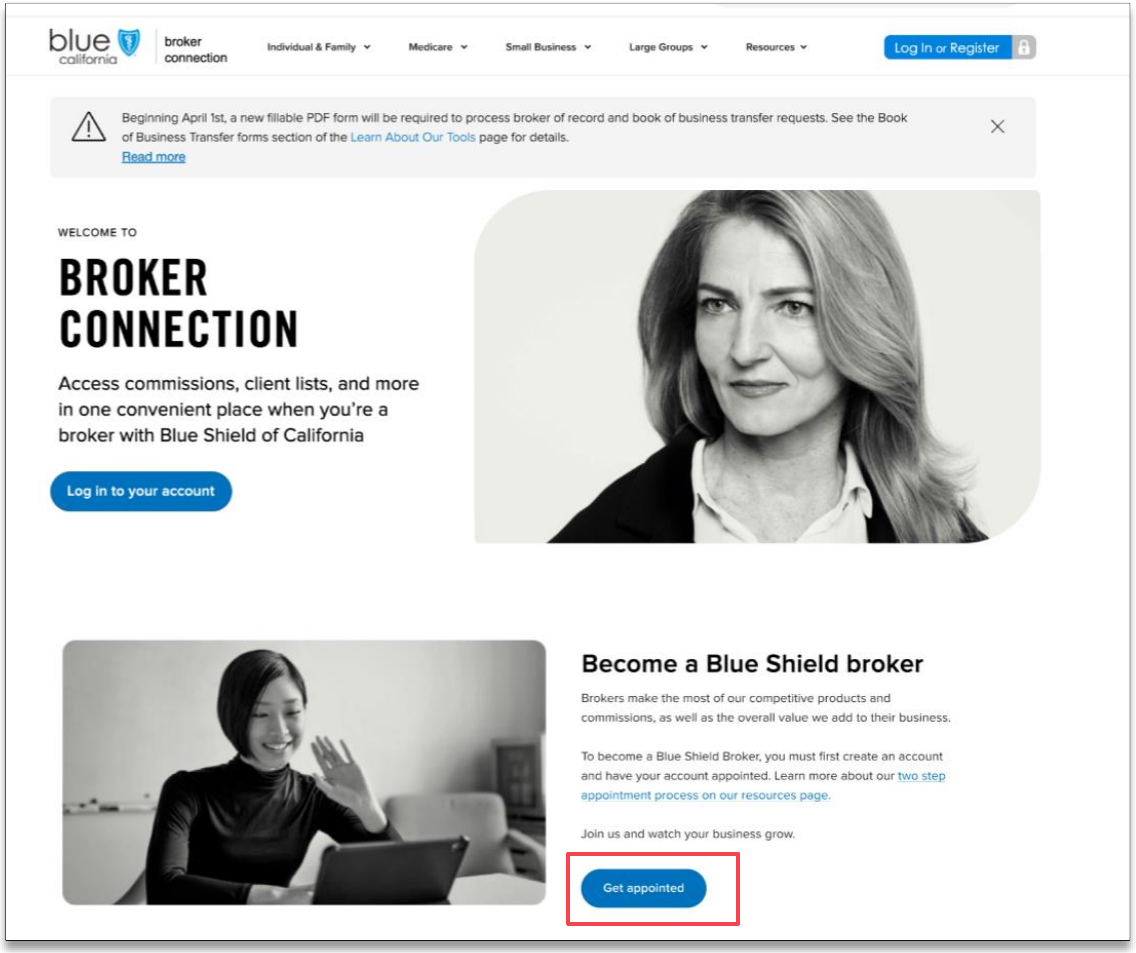
In this section you will learn the process of registering and logging into your account.

Creating an Account

Step 1:

Navigate to BSC Website and click *Broker* on the top right corner of the Webpage.
Navigate to the Broker Connect homepage and click the Get Appointed button.

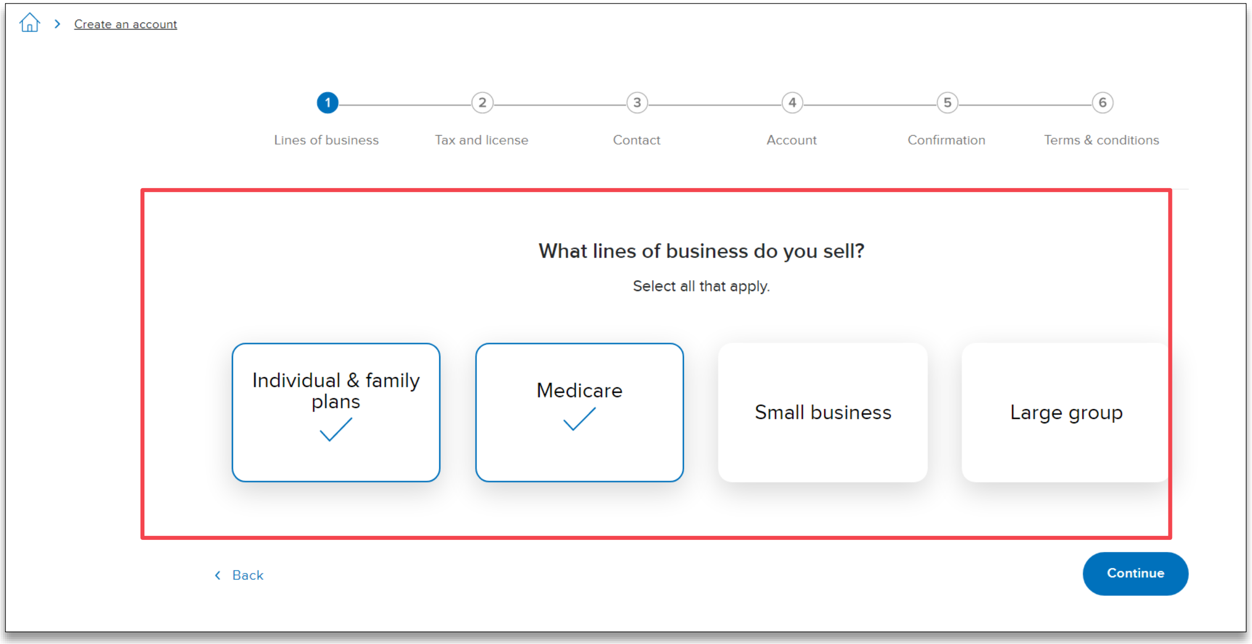




Creating an Account

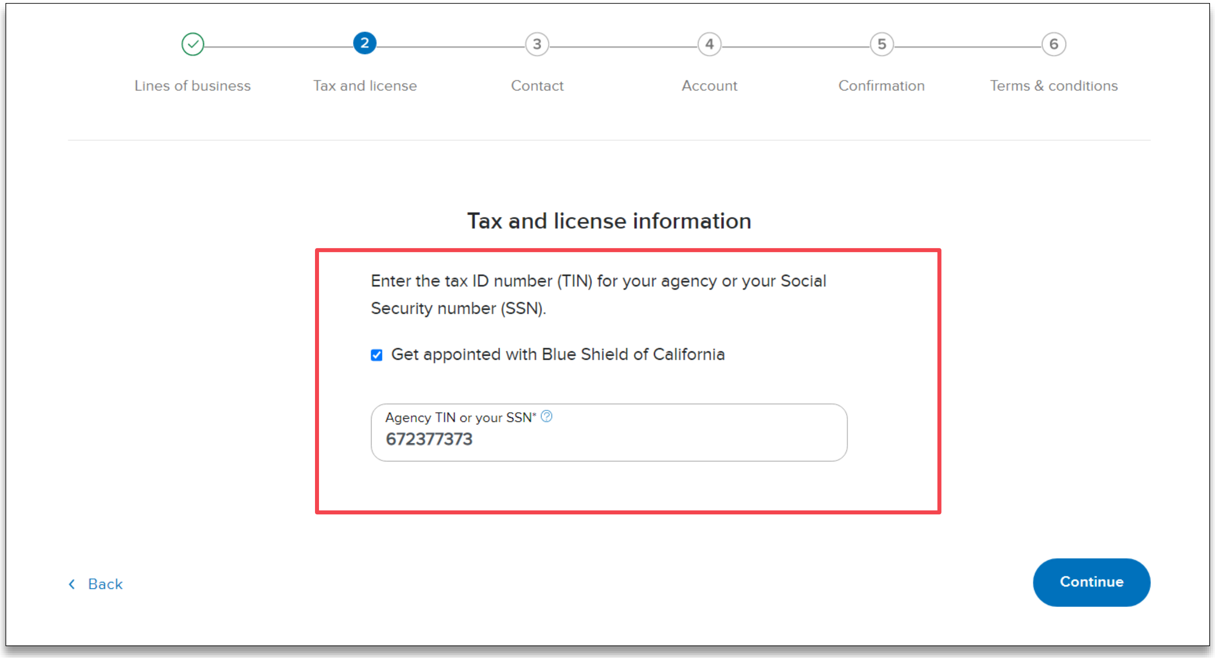
Step 2:

Select the *lines of business* you sell and click *Continue*.



Step 3:

Add the *Tax and license information* and click the *Continue* button

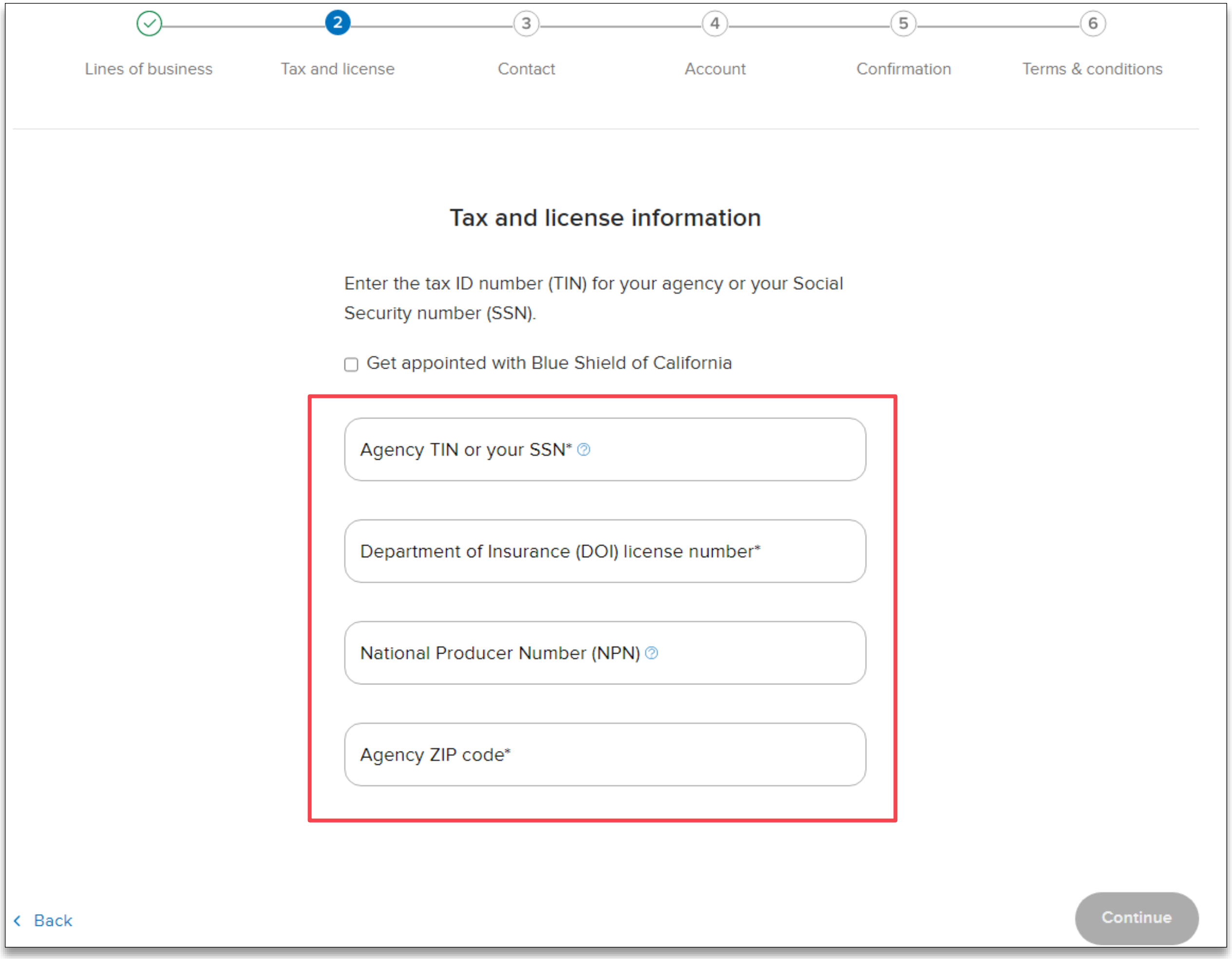


NOTE: If the broker is already appointed, deselect the checkbox to continue.

Creating an Account

Step 4:

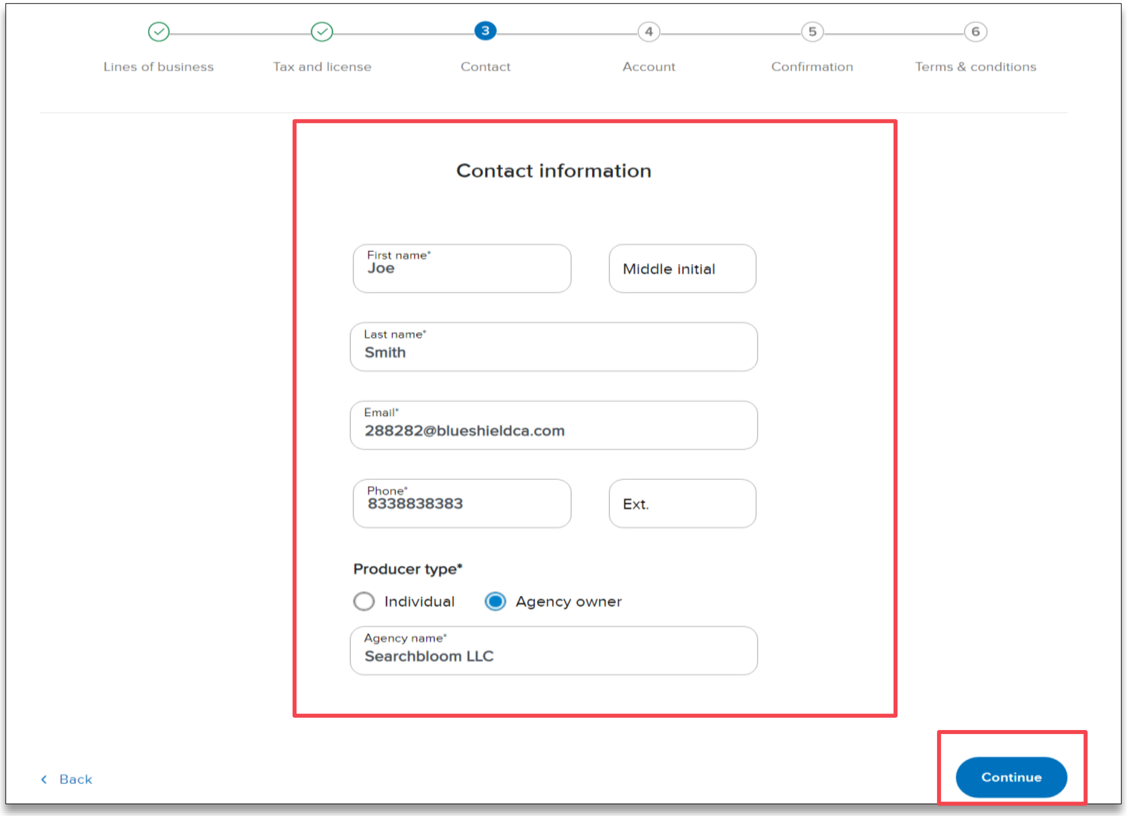
Complete the Tax and license information and click continue. (*Required fields if you are already appointed with Blue Shield)



Creating an Account

Step 5:

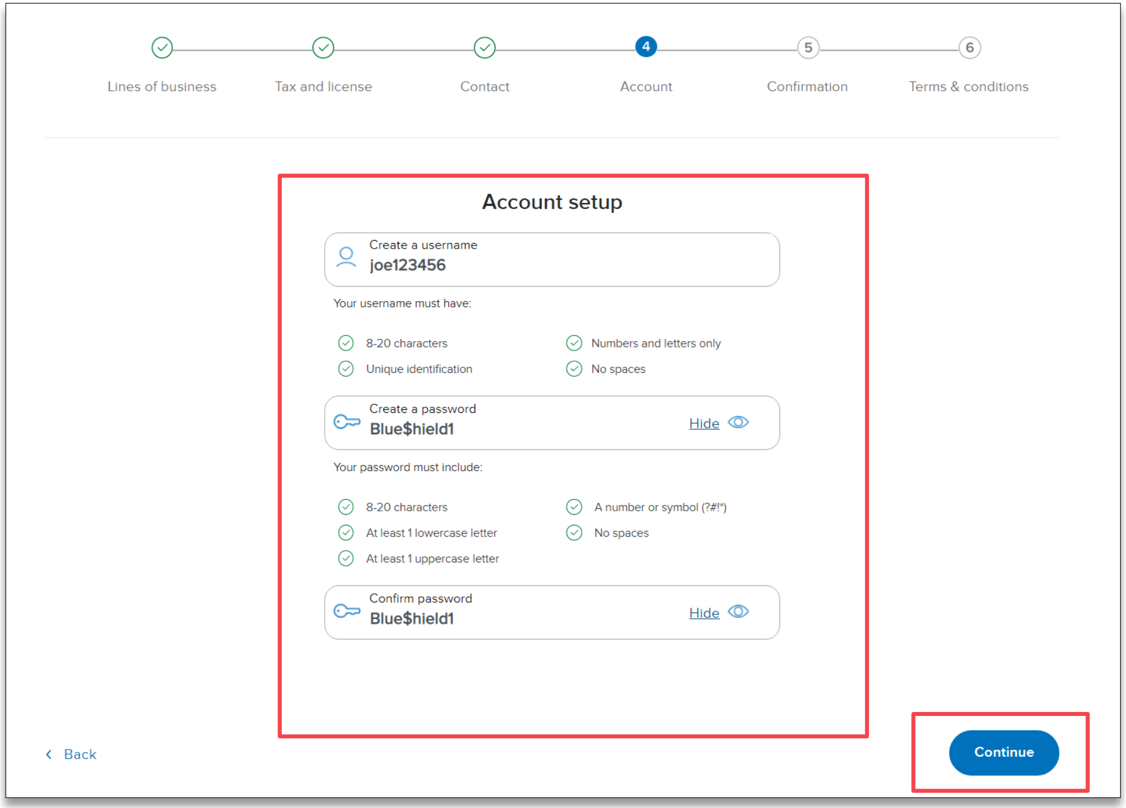
Enter your *Contact information* and click *the Continue* button.



NOTE: If the Producer type is an individual, the Agency name field will not be displayed.

Step 6:

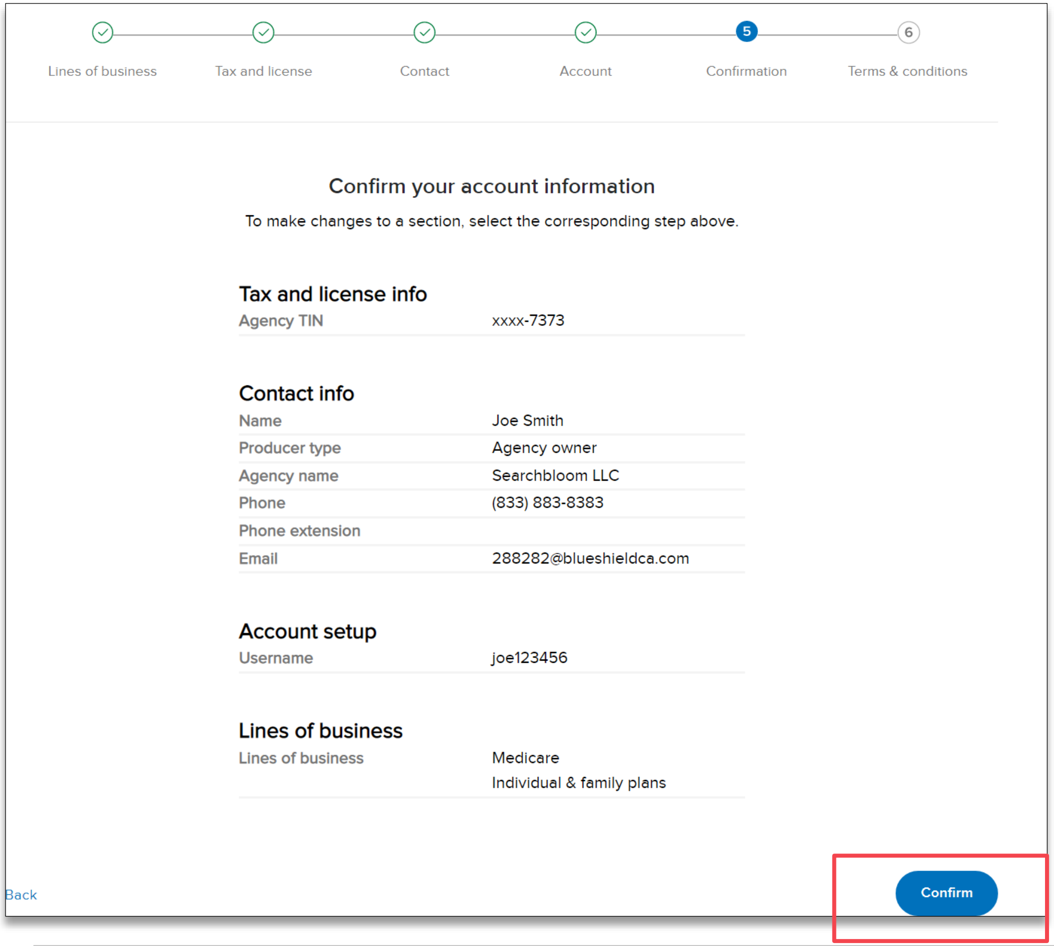
Create a *username* and *password* and click the *Continue button.*



Creating an Account

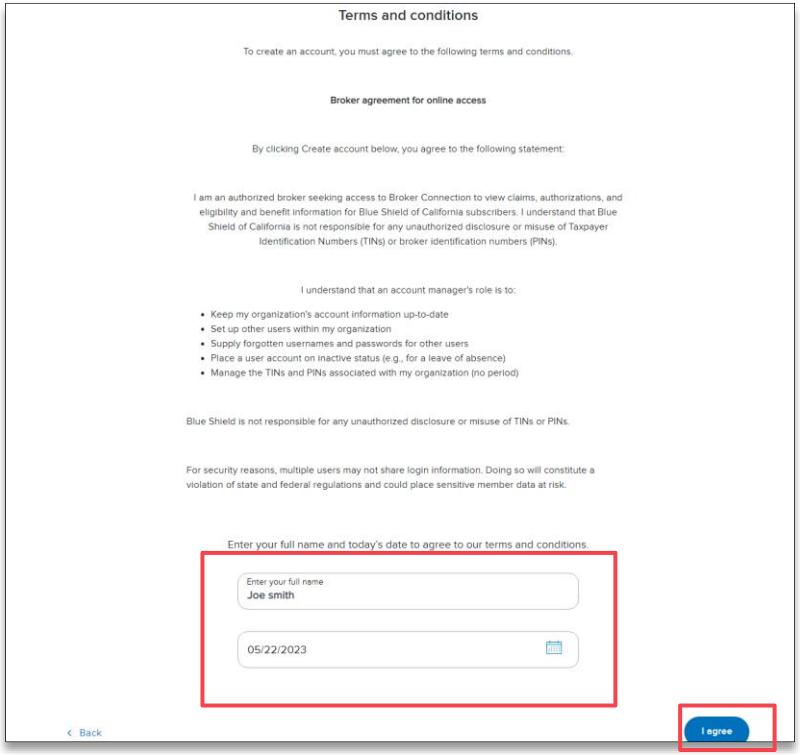
Step 7:

Confirm your account information and click the *Continue* button.



Step 8:

Review the *Terms and conditions*. Enter your *full name*, *today's date* and click the *I agree* button.

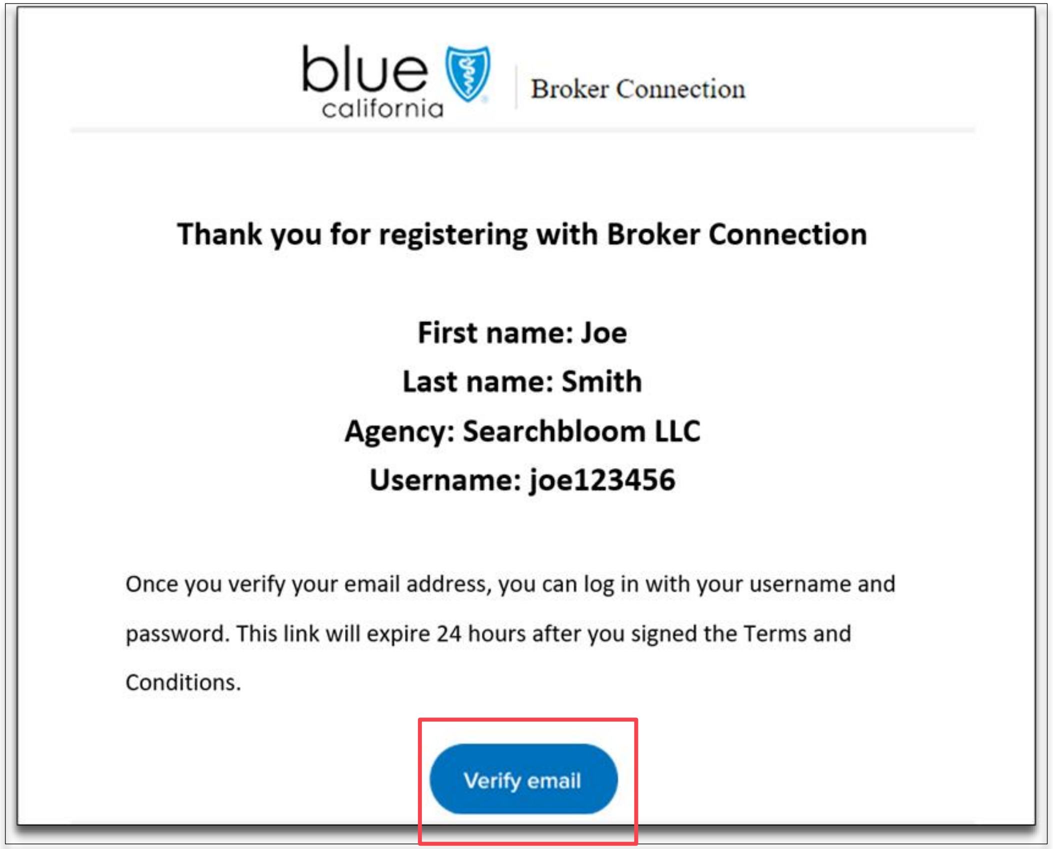


NOTE: After clicking *I agree*, check your inbox. You will receive an email requesting that you confirm your email address.

Logging In

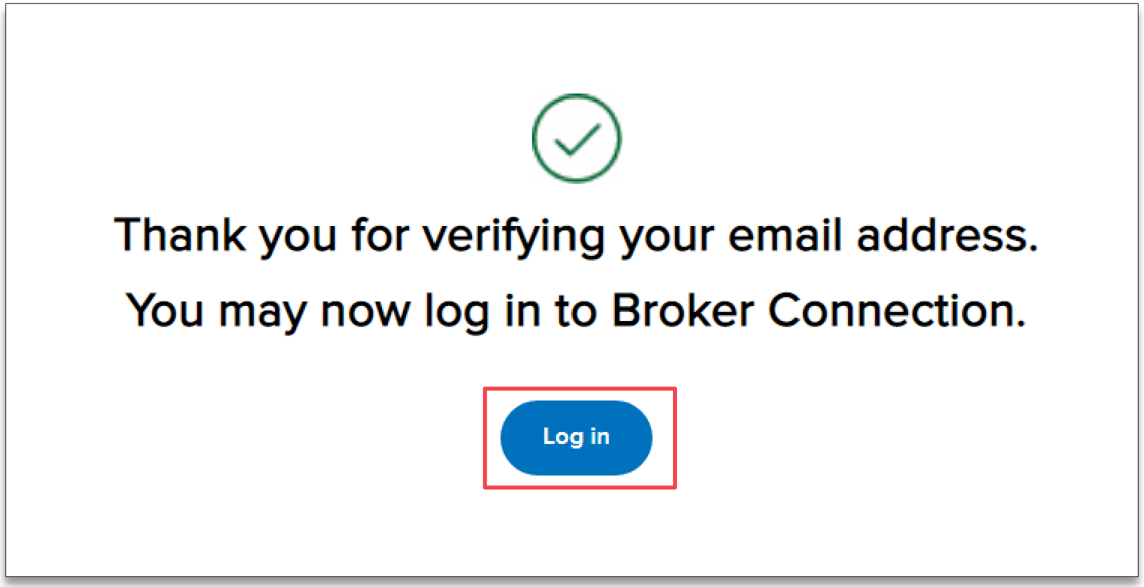
Step 9:

Check your email inbox and Click the *Verify email* button. You are now registered with Broker Connection.



Step 10:

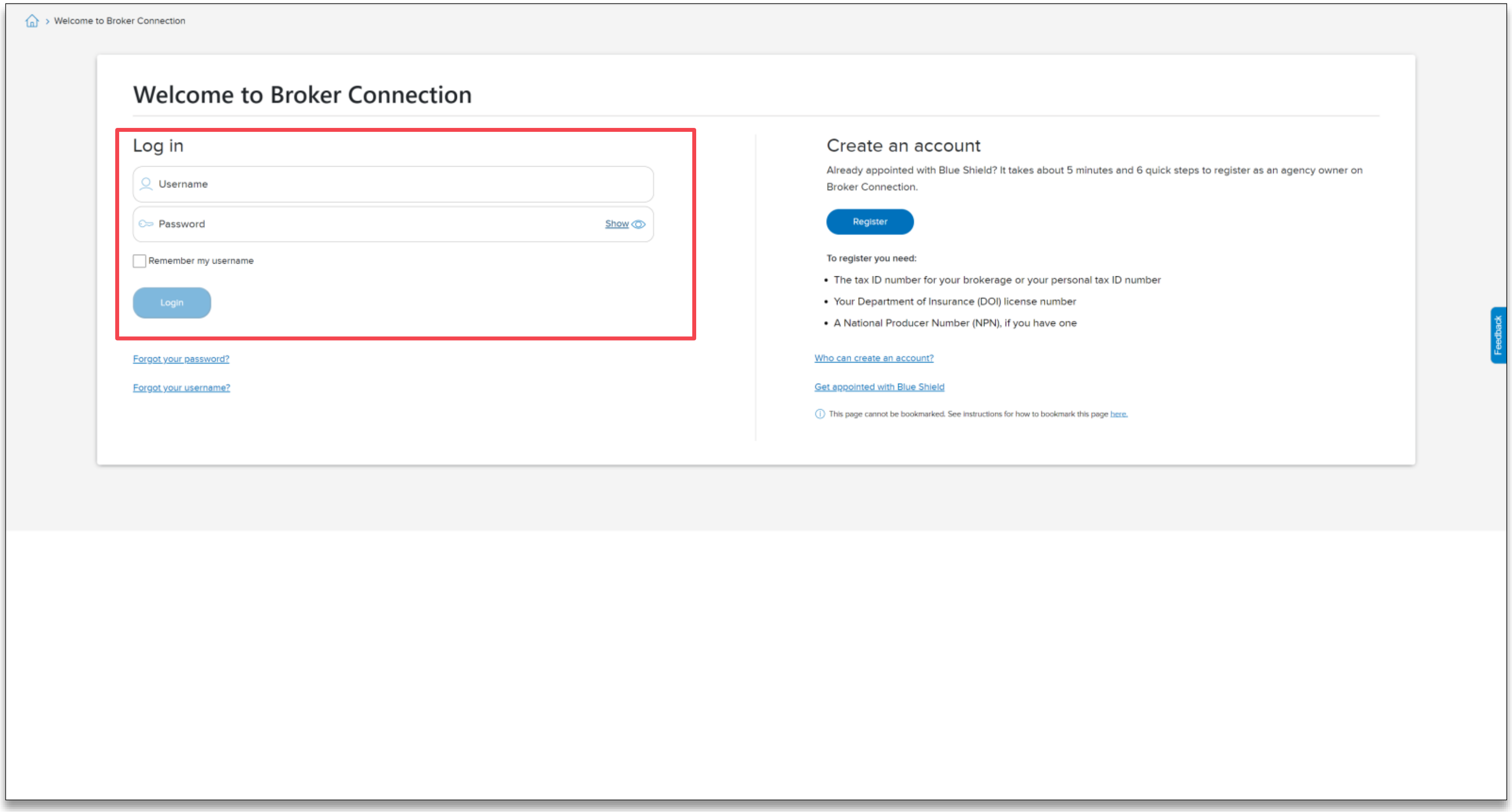
Once your email has been verified, you can now log into Broker Connection. Click the *Log in* button.



Logging In

Step 11:

Enter your *Username* and *Password* that you created in the prior steps and click the Login button to continue.



Pro Tip

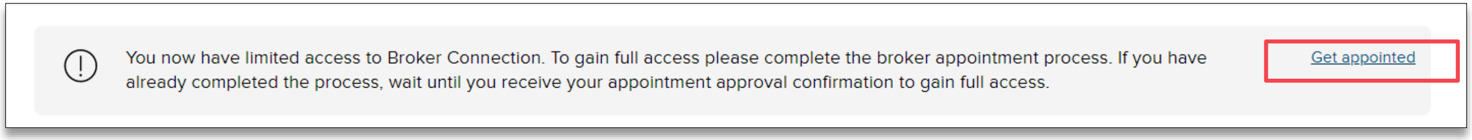
Your login information will remain the same as you complete the application process and become appointed with Blue Shield.

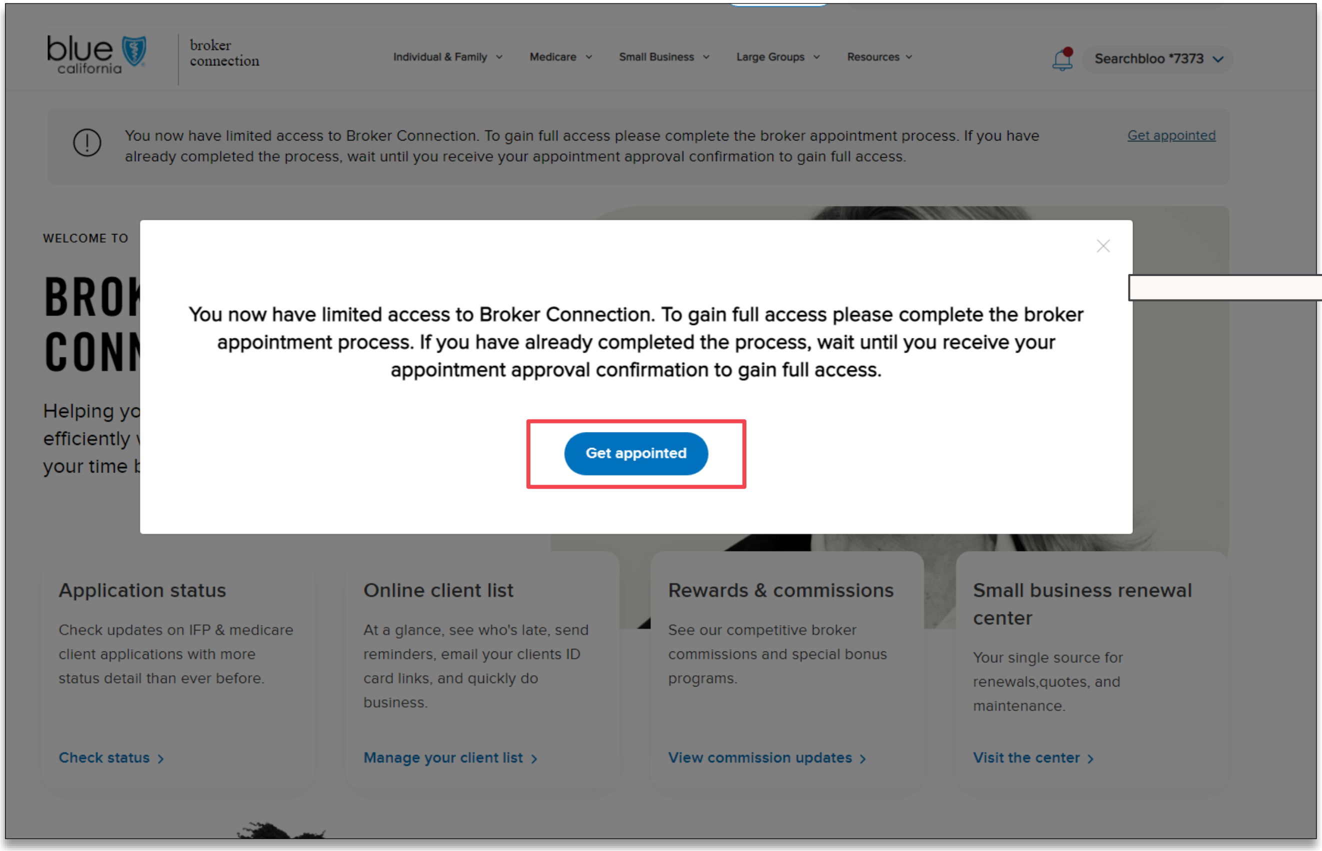
NOTE: You will have limited access to certain features (i.e., application status, commissions, etc.) until you are fully appointed with Blue Shield.

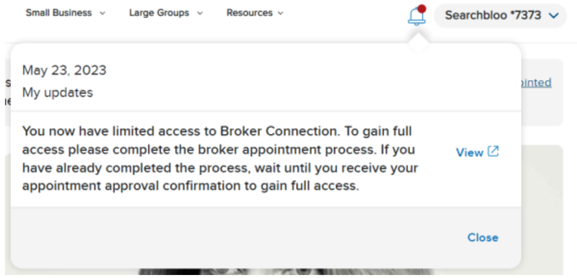
Logging In

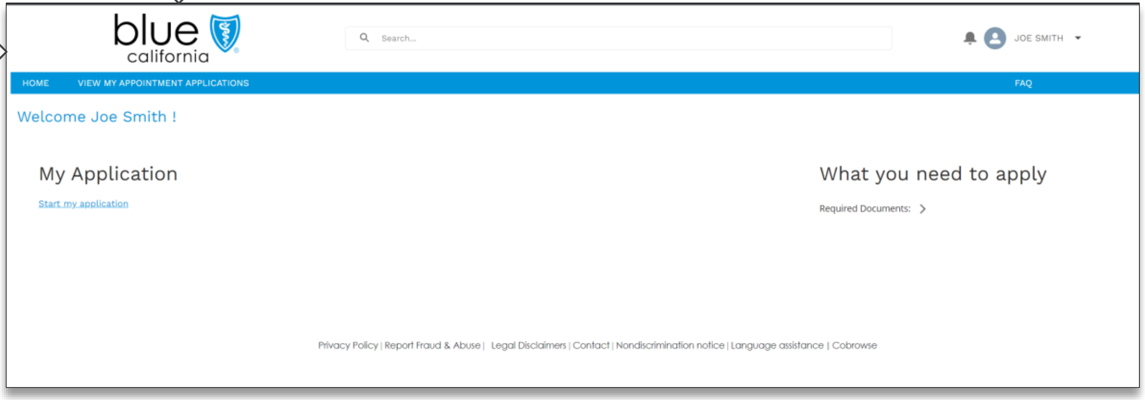
Step 12:

After you log in, click on *Get appointed* which will take you to the Broker appointment application.









NOTE: You will get full access to Broker Connection when you are appointed with Blue Shield and receive your Welcome email.

Begin

Start My Application

This section will walk you through completing a broker appointment application.

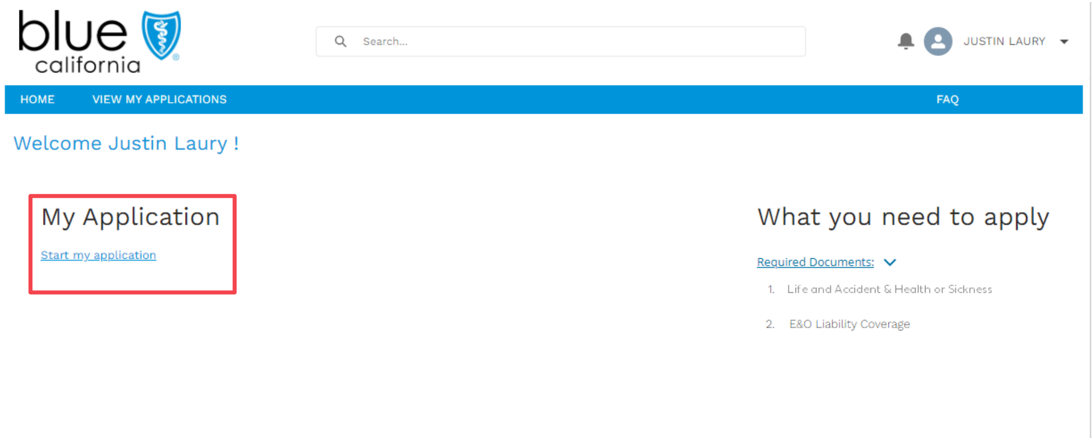
Start My Application

Step 1:

Once logged in, you will be taken to the landing page. Click *Required Documents* to view the document needed to complete your application.

Step 2:

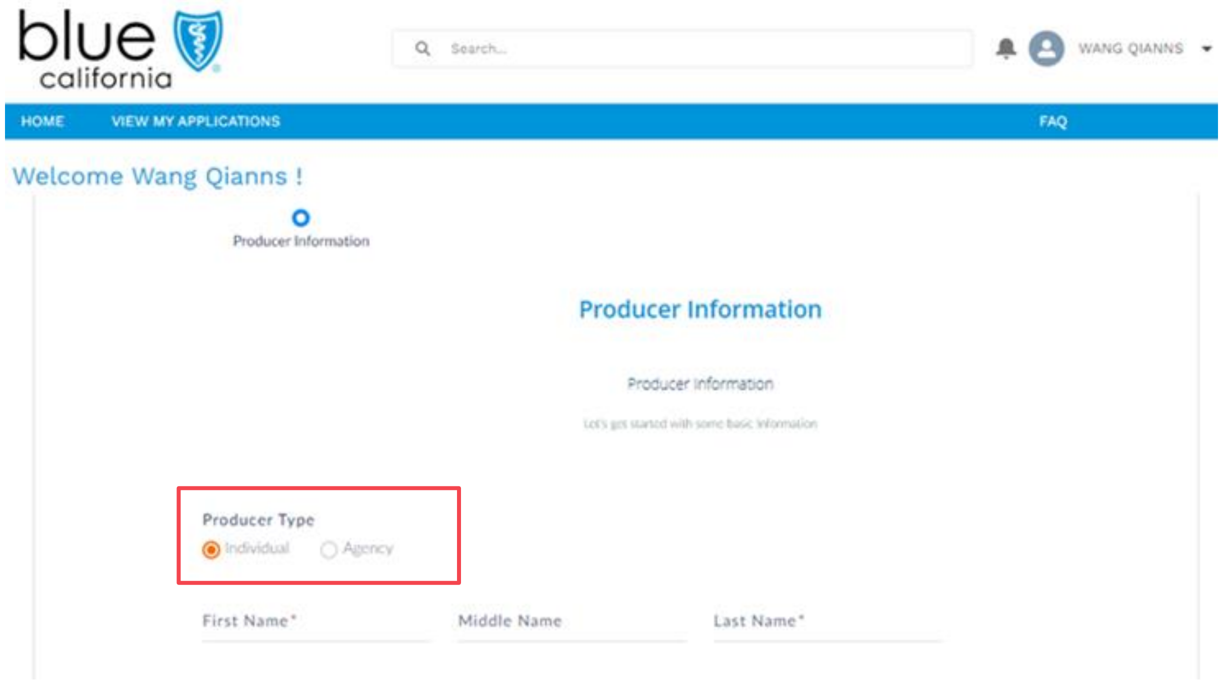
Review and gather the necessary documents and click *Start my application*.



Producer Information

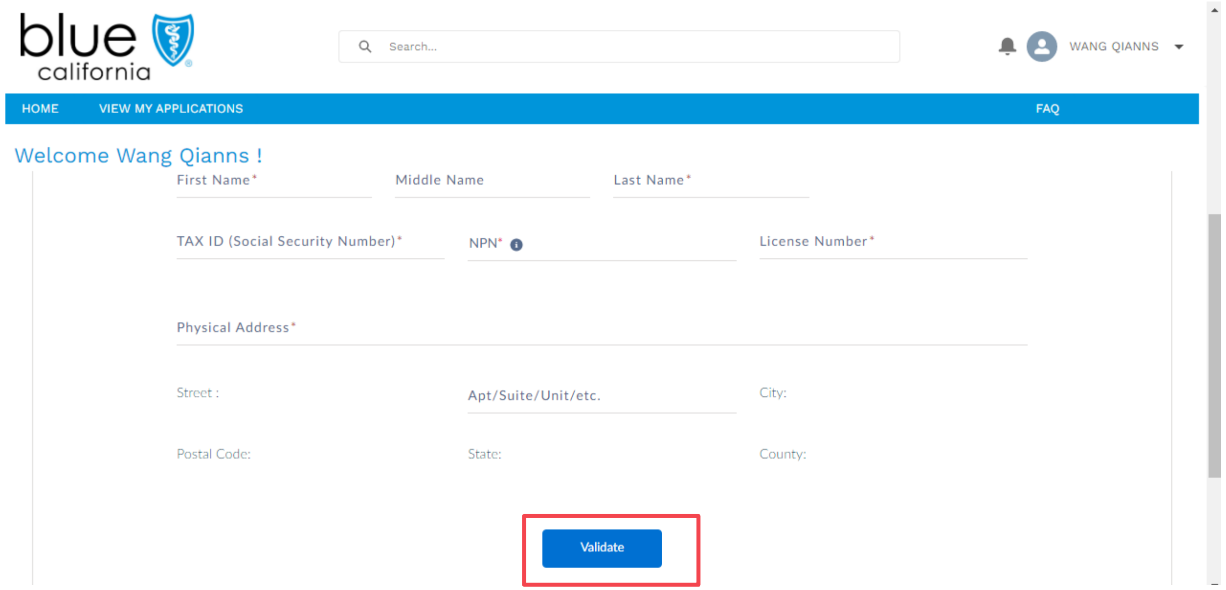
Step 3:

Complete all required fields in the *Producer Information* section.



Step 4:

Click the *Validate button.*

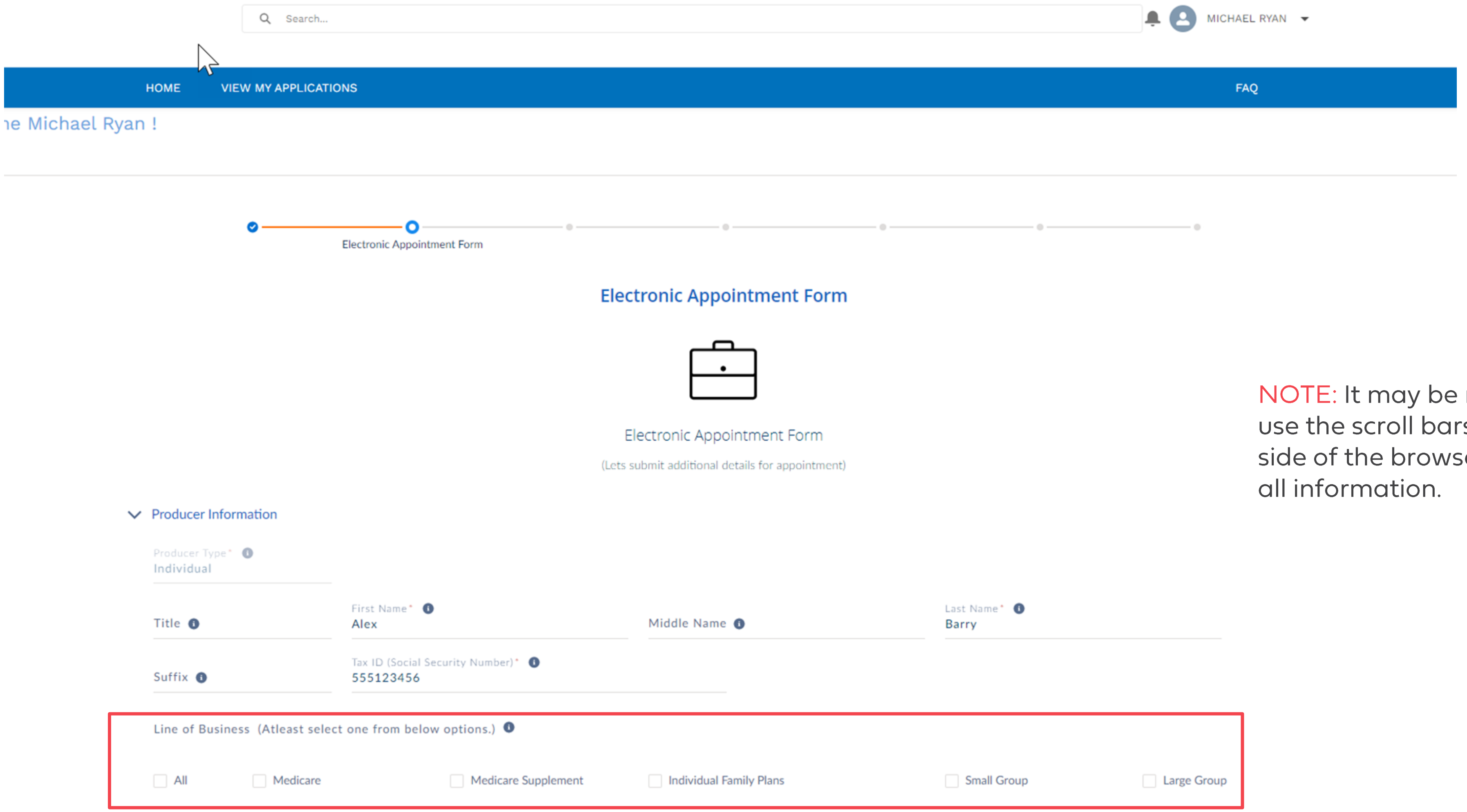


NOTE: When manually adding address, the State field is a dropdown with all 50 states listed along with DC.

Electronic Appointment Form

Step 5:

Complete all required fields on the *Electronic Appointment form* and select one or more from the *Line of Business* options.



NOTE: It may be necessary to use the scroll bars on the right side of the browser to complete all information.

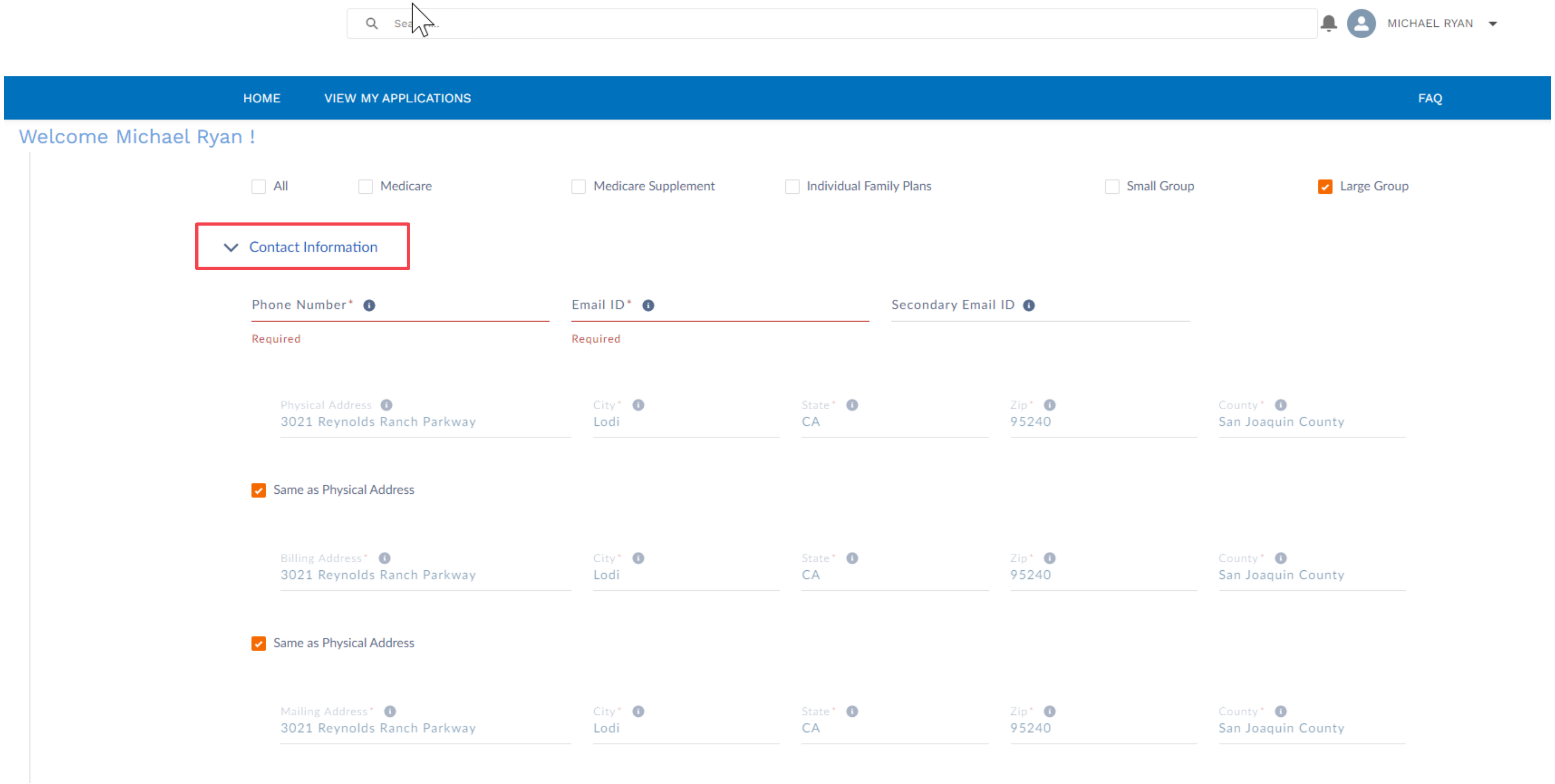
Contact Information

Step 6:

Complete all required fields on the *Contact Information section*

NOTE:

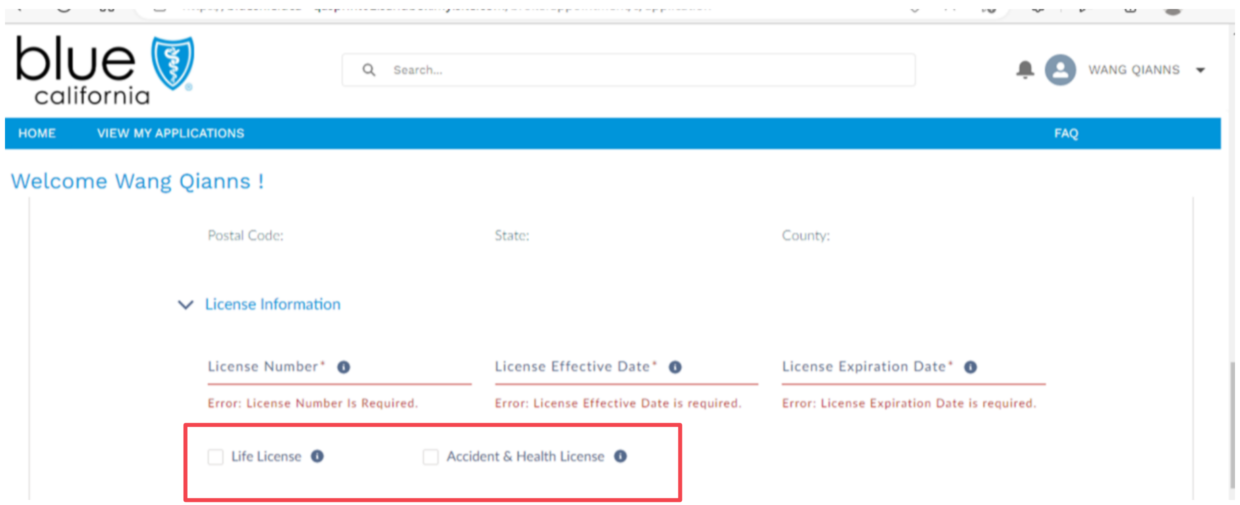
- Secondary email address is copied to any email notifications sent to the primary email address.
- If the billing and mailing addresses are the same, click the box and addresses will copy from Physical address. If different, enter each address separately.



License, Banking, and E&O Information

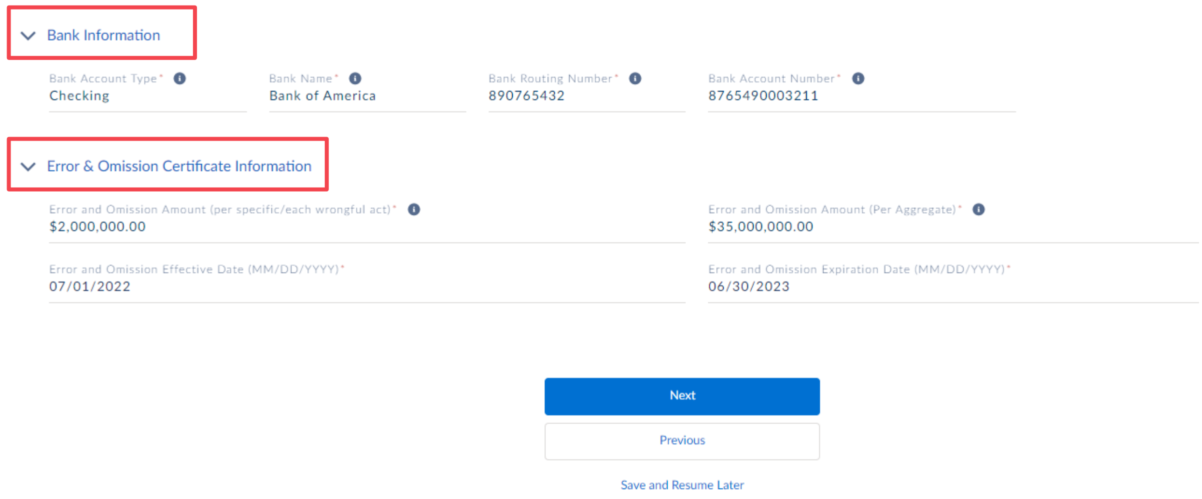
Step 7:

Complete all required fields in the *License Information* section.



Step 8:

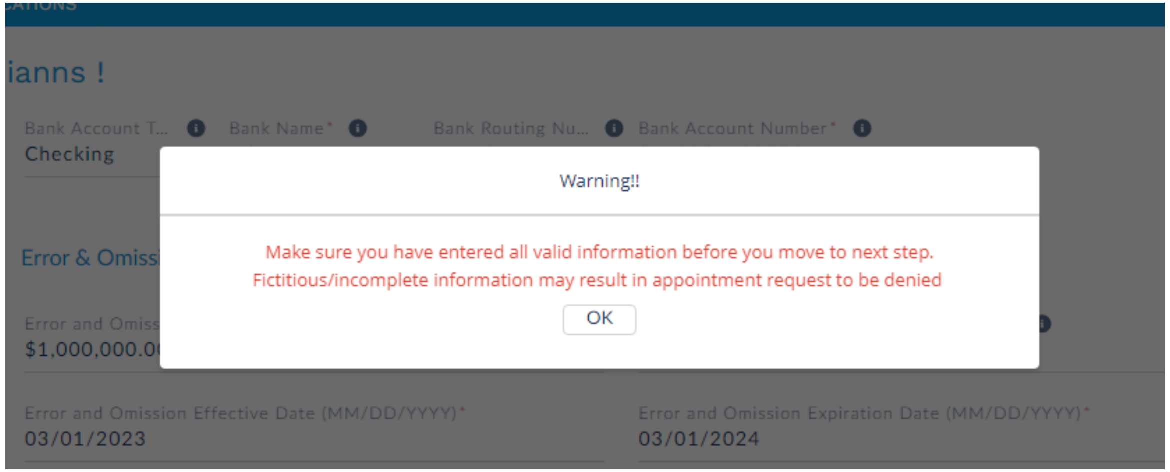
Enter *Banking information* , *a*dd coverage amounts, and dates of coverage for *Error & Omissions Declaration page*.



License Information

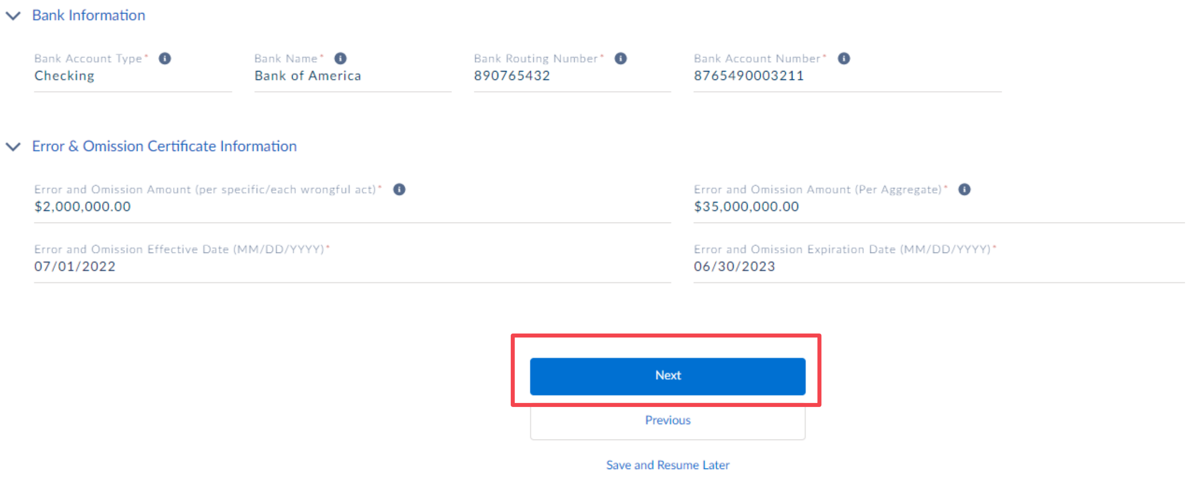
RESULT:

A warning message pops up once the data in all fields has been entered. Please take the time to review your entries to ensure all data is correct. Make any necessary corrections, if needed, then Click OK.



Step 9:

Click the *Next* button.



Begin

Signing Documents

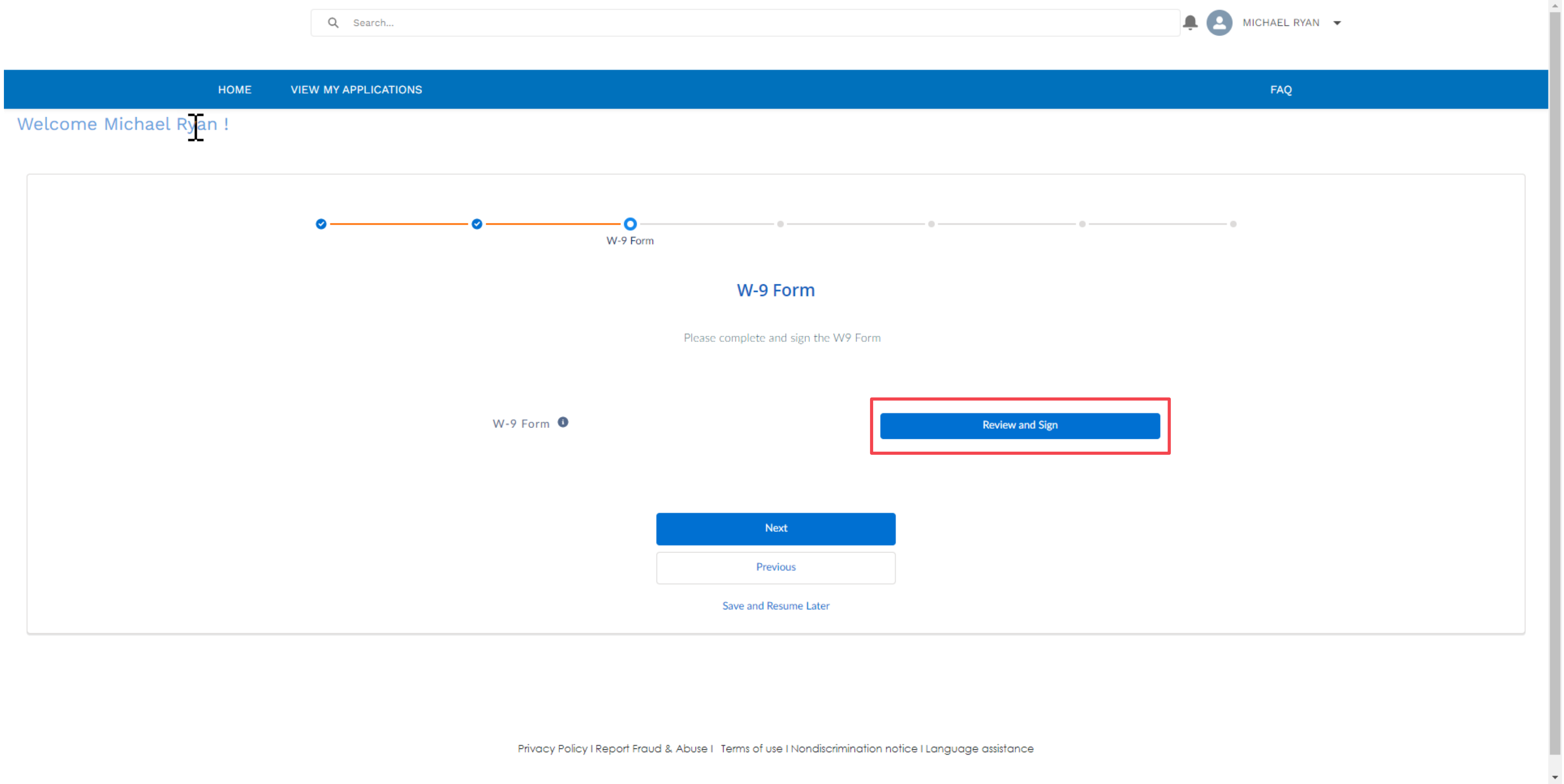
This section will walk you through the process of electronically signing required forms.

W-9 Form

Step 1:

Click the *Review and Sign* button.

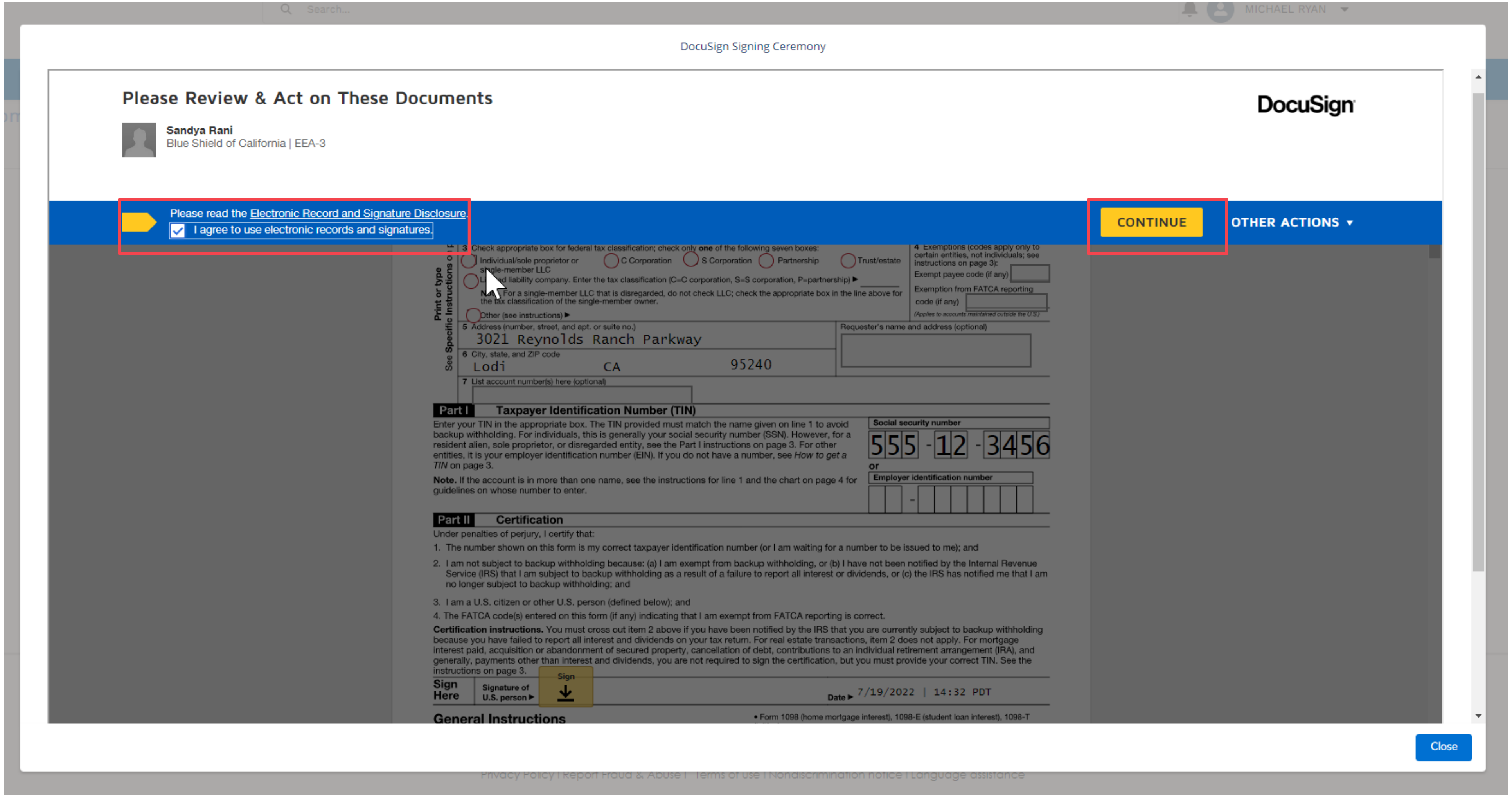
NOTE:
Clicking the Review and Sign button will automatically launch a DocuSign window to complete the W-9 Form electronically.



W-9 Form

Step 2:

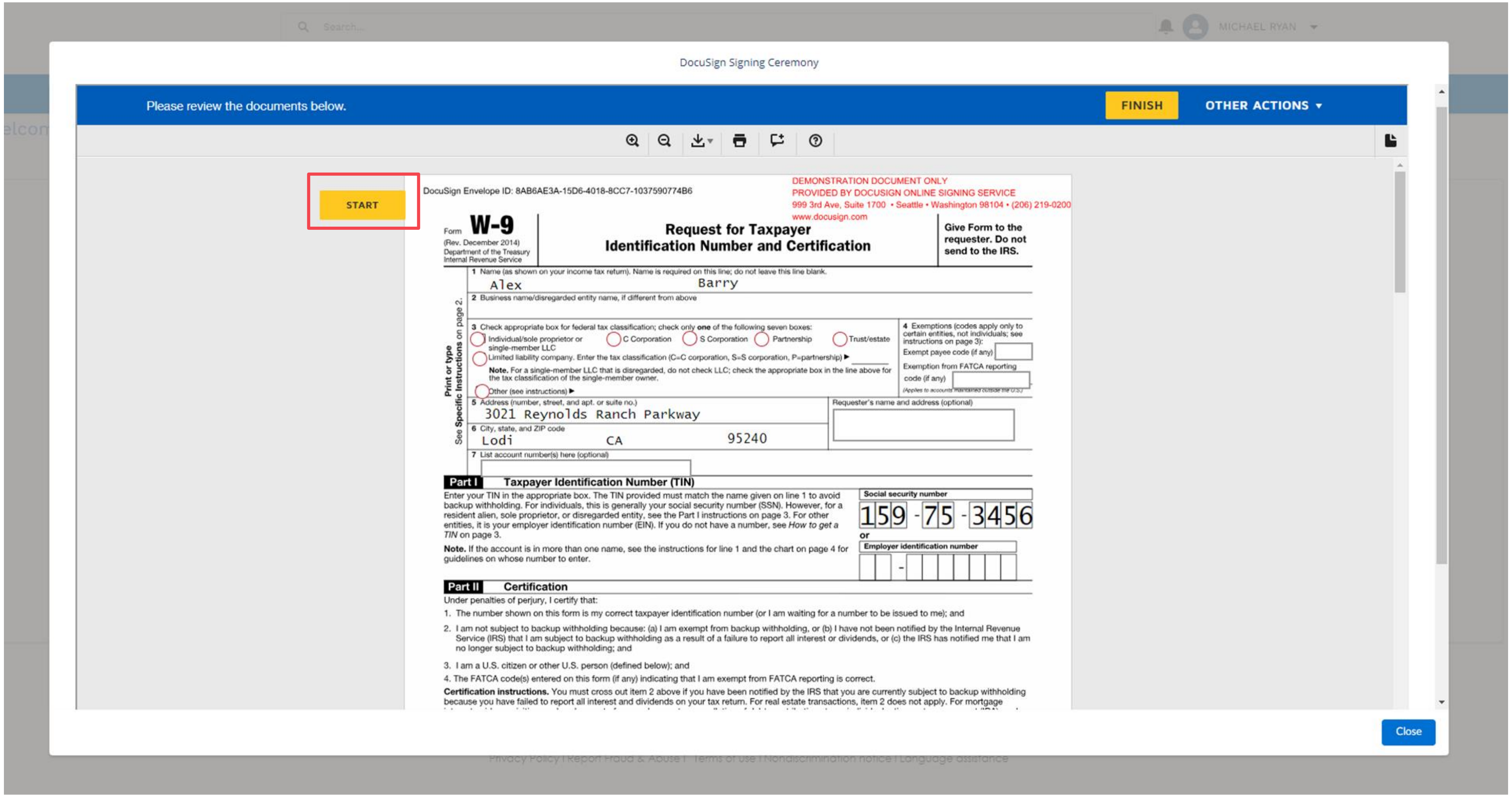
Check the box agreeing to use the e-signature screen and click the Continue button.



W-9 Form

Step 3:

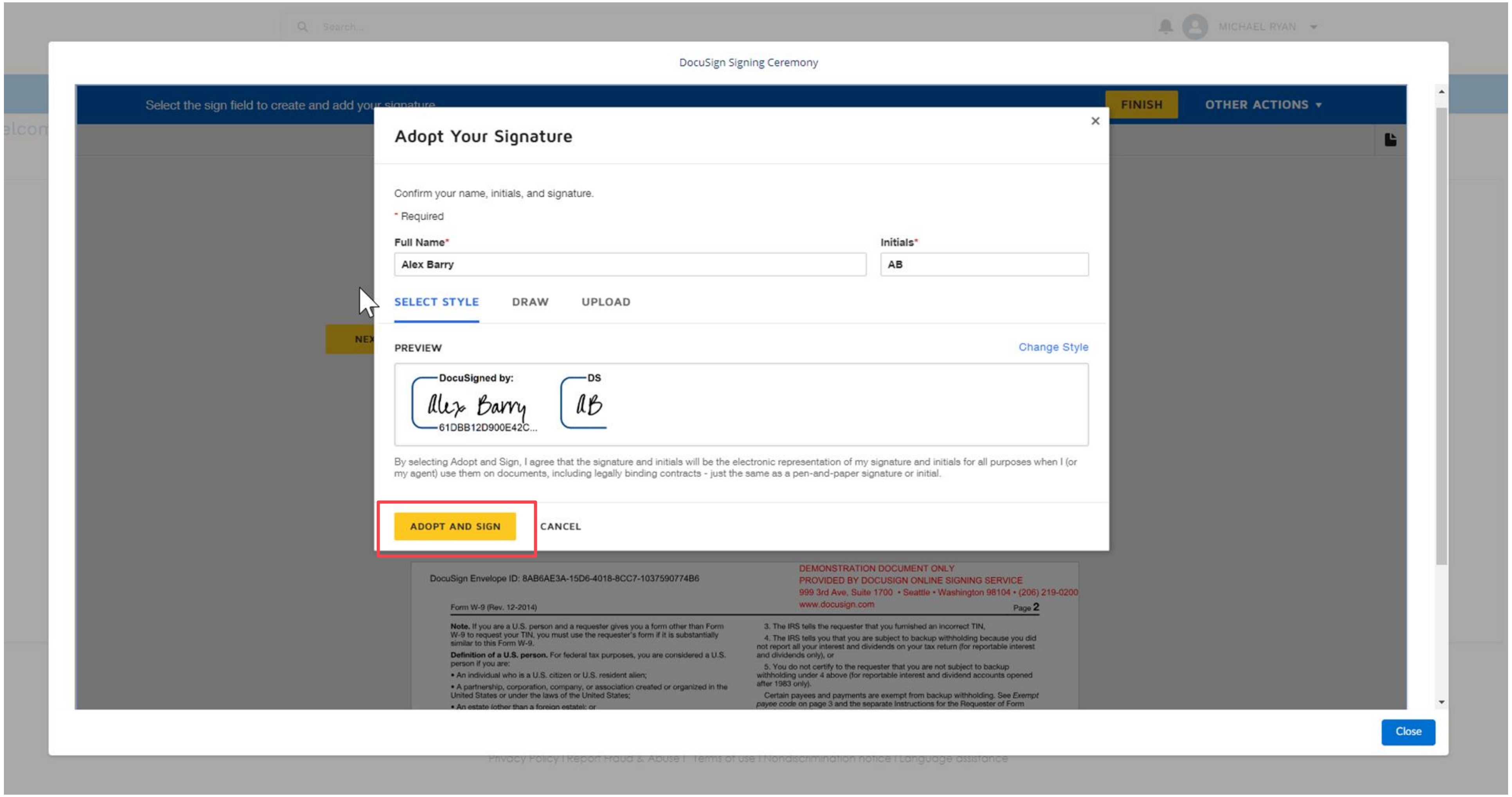
Click *Start* button and complete W-9 form.



W-9 Form

Step 4:

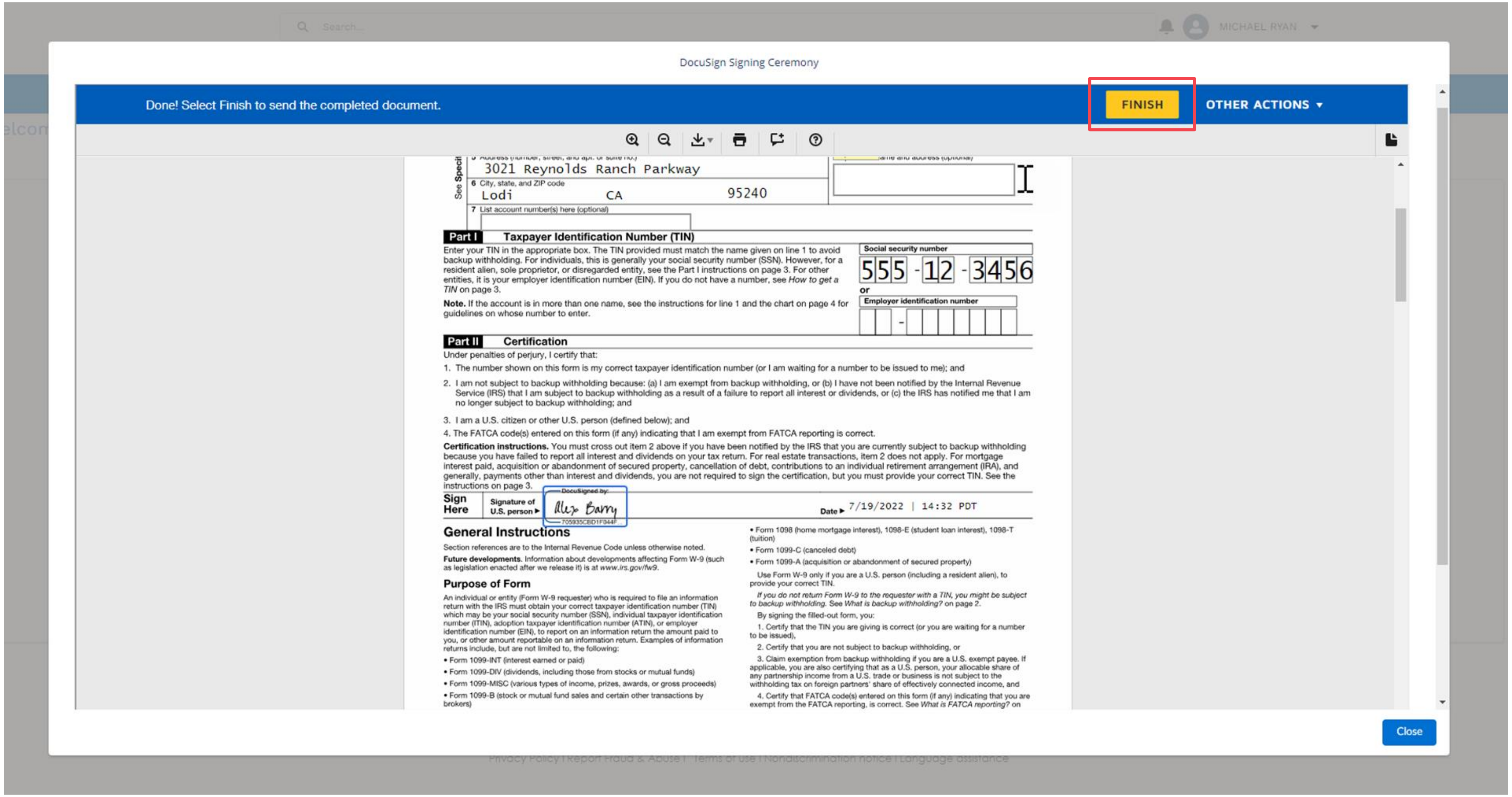
If asked, accept e-signature style. Click the *Adopt and Sign* button.



W-9 Form

Step 5:

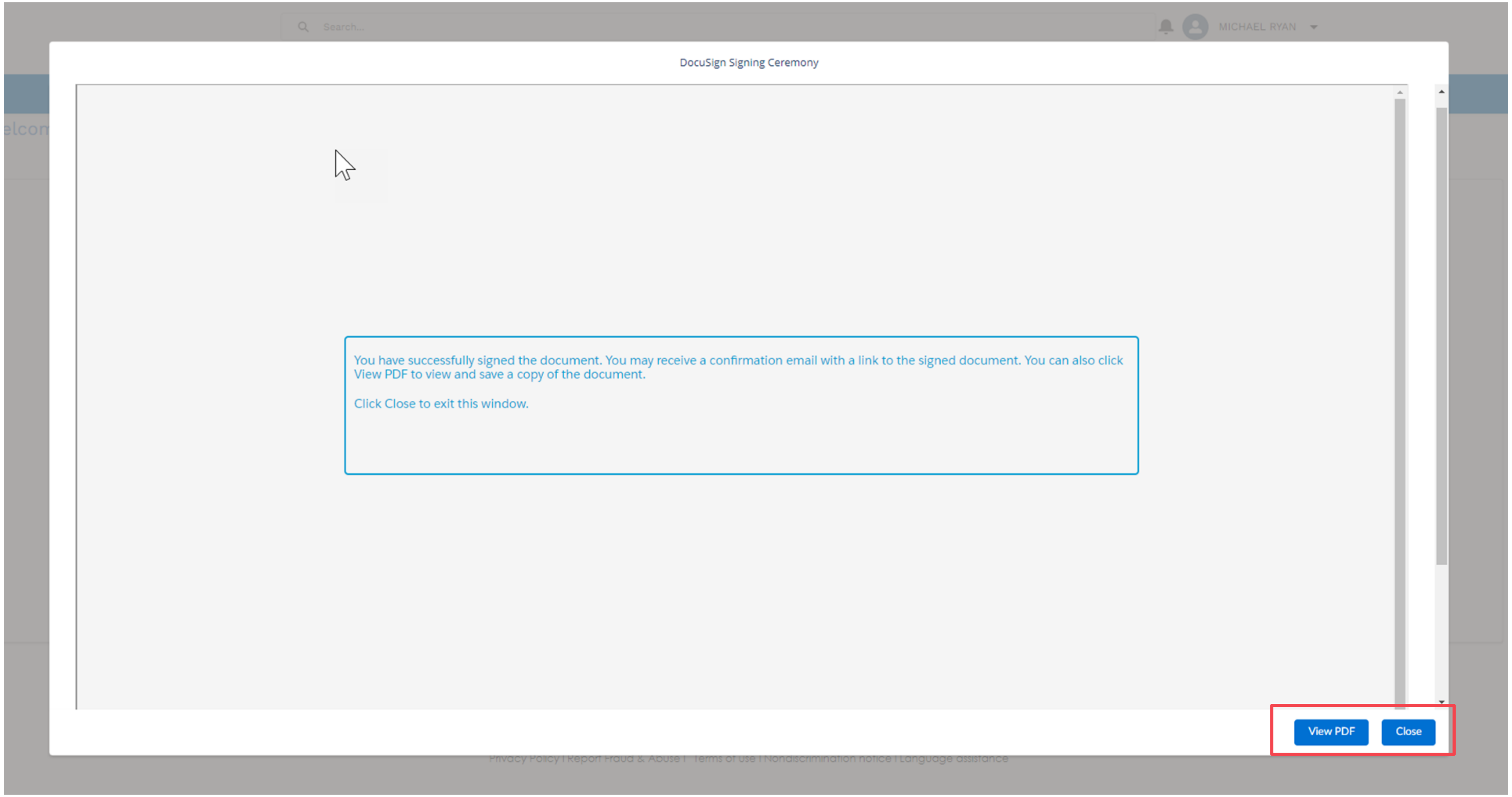
Once e-signature is applied, click the *Finish* button on the top of the form.



W-9 Form

RESULT:

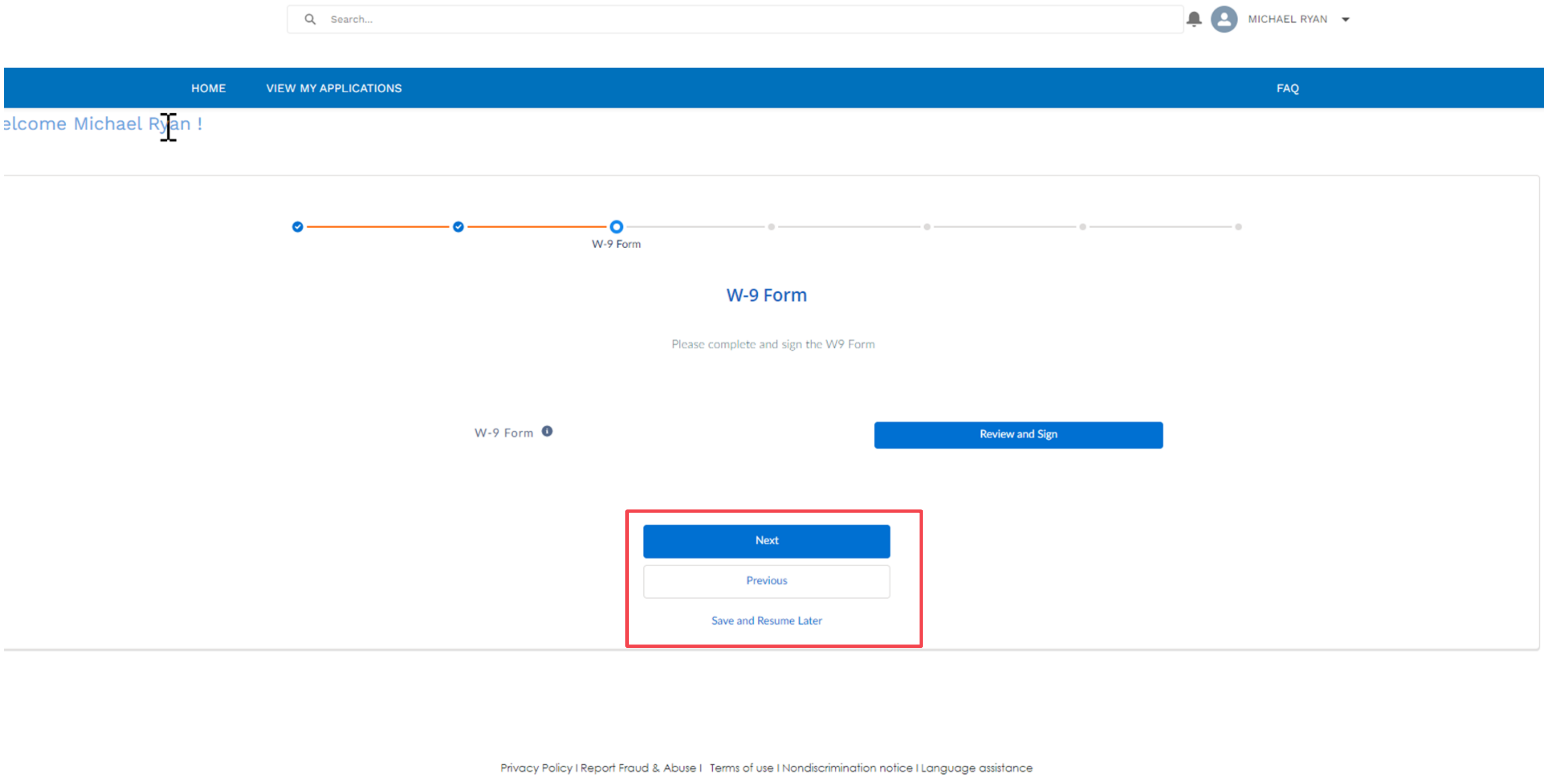
A confirmation appears when successfully signed. Choose to View the completed W-9 in PDF or click *Close* button.



W-9 Form

Step 6:

Click the *Next* button to upload required documents (Health License and E&O Coverage certificate).

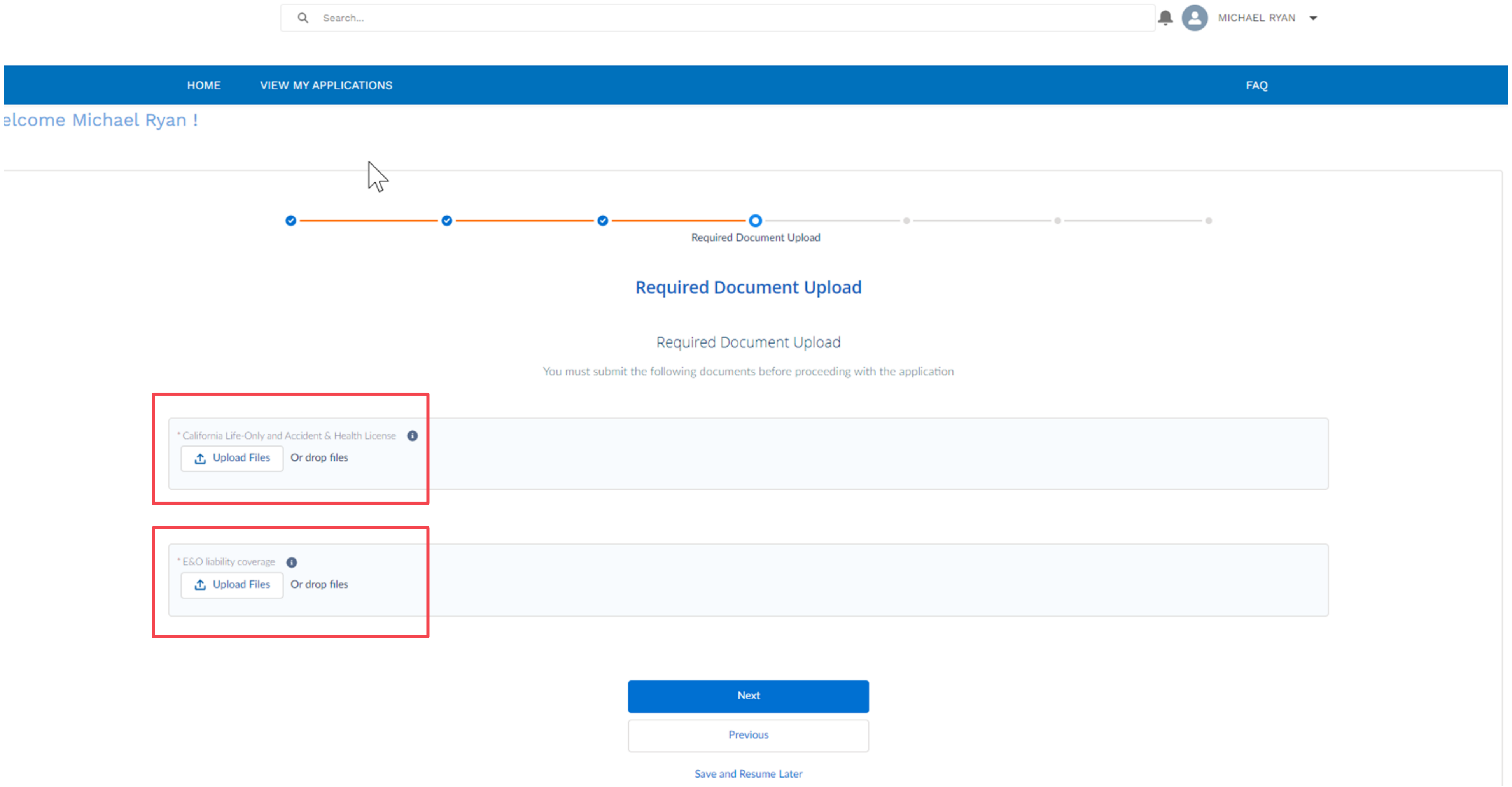


NOTE:
If needed, click *Save and Resume Later* button and progress is saved.

Required Document Upload – License and E&O

Step 7:

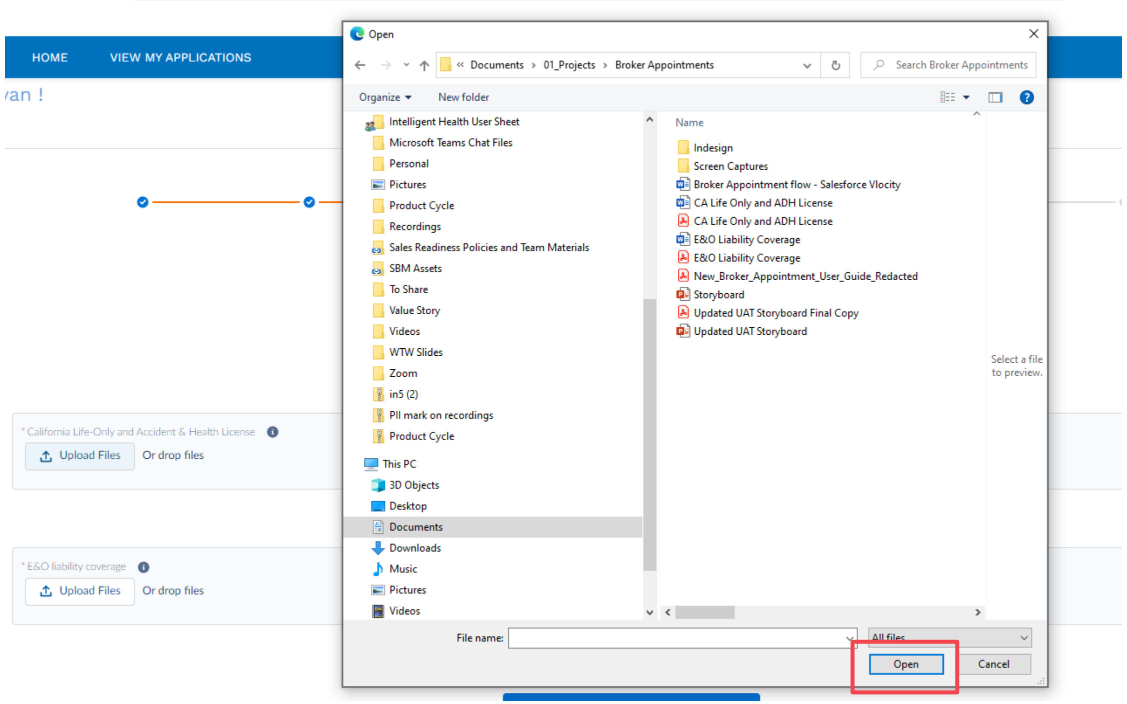
Click the *Upload Files* button to browse and locate files to upload.



Required Document Upload - License and E&O

Step 8:

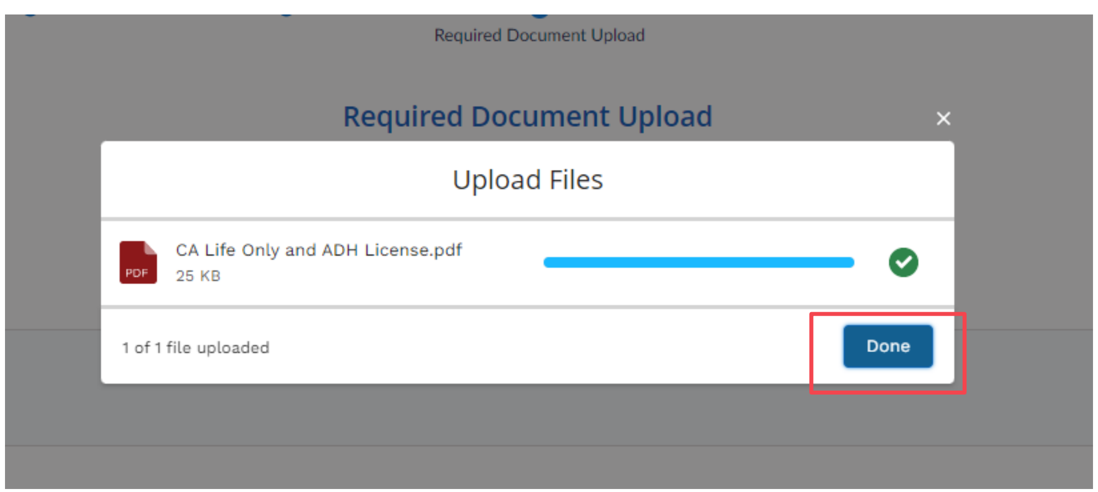
Locate file and click *Open.*



NOTE: Files can also be dragged and dropped onto file loader from computer.

Step 9:

Click the *Done* button.

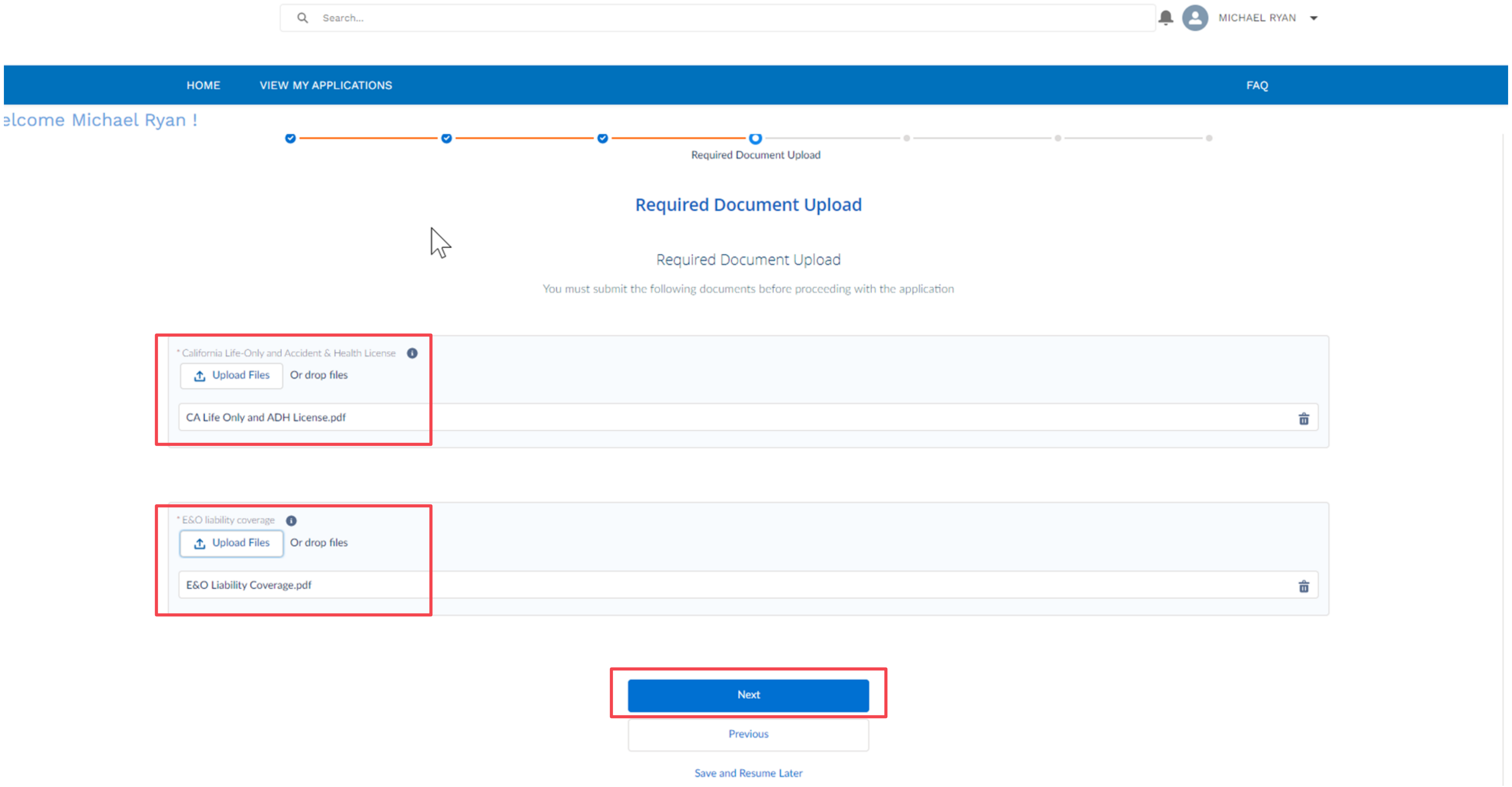


NOTE: Repeat steps 24 -26 to upload the second document.

Required Document Upload - License and E&O

Step 10:

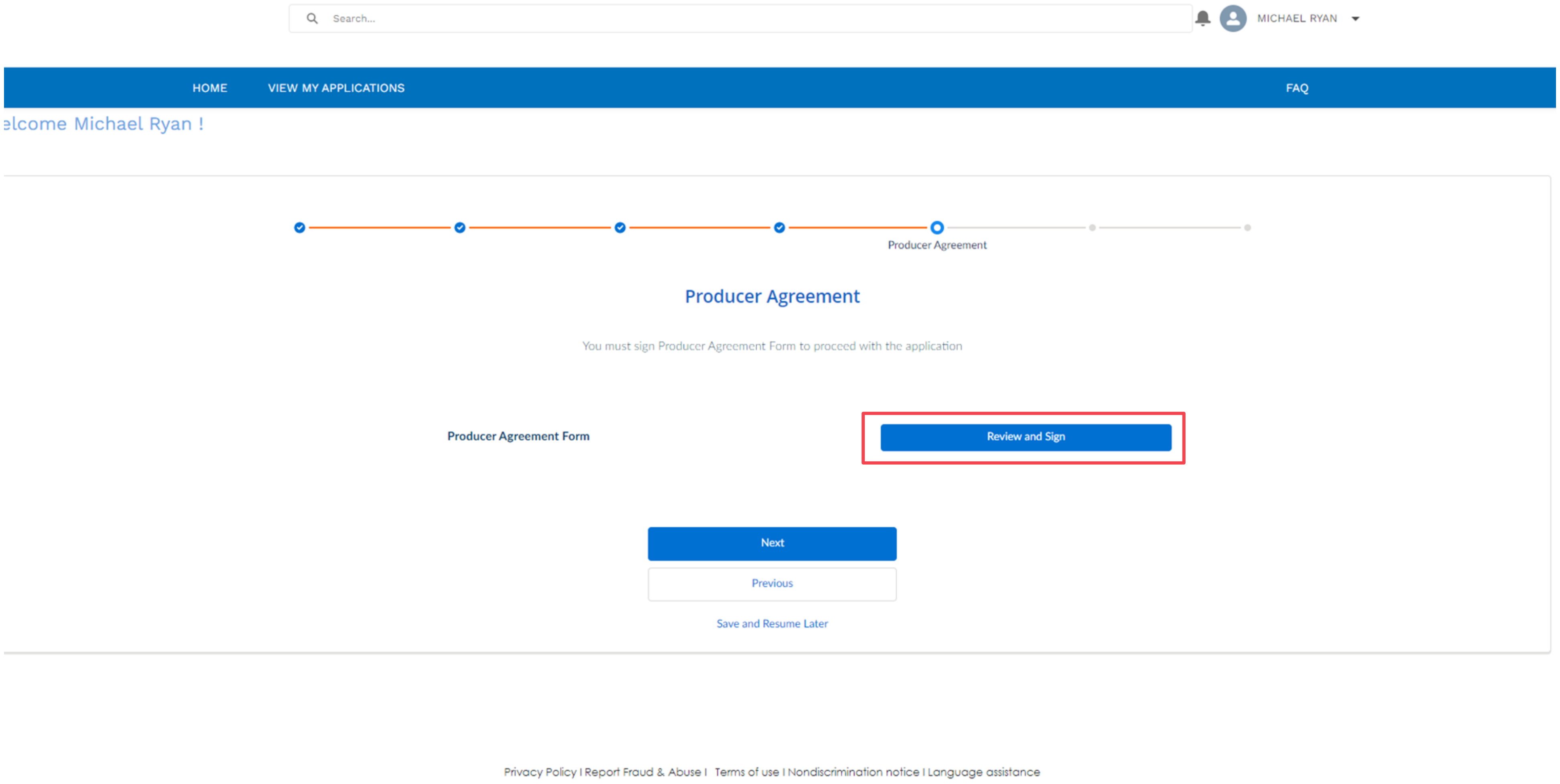
Verify documents are uploaded and click the *Next* button.



Broker Agreement

Step 11:

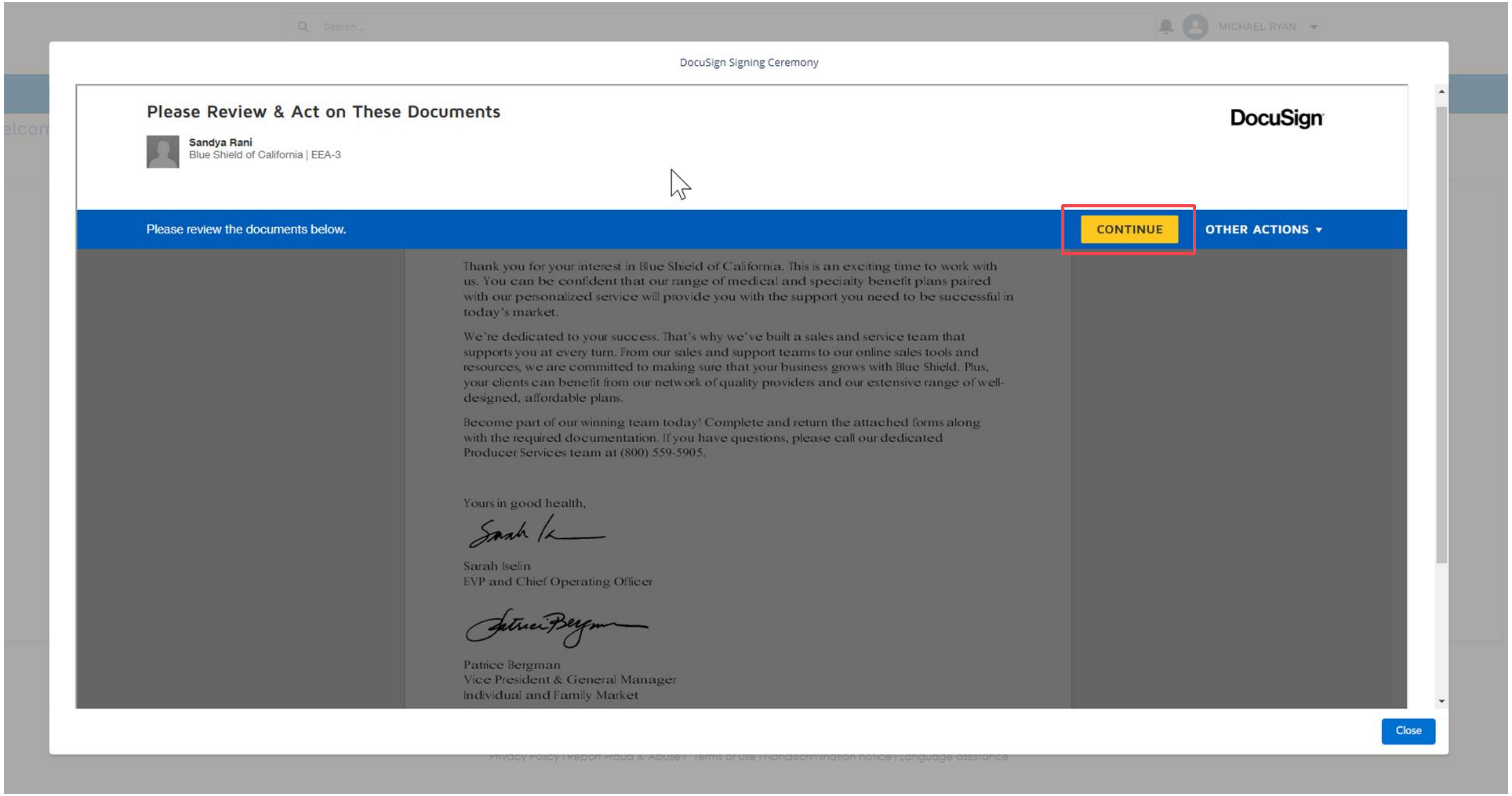
Next, e-sign the Producer Agreement. Click the *Review and Sign* button to begin.



Broker Agreement

Step 12:

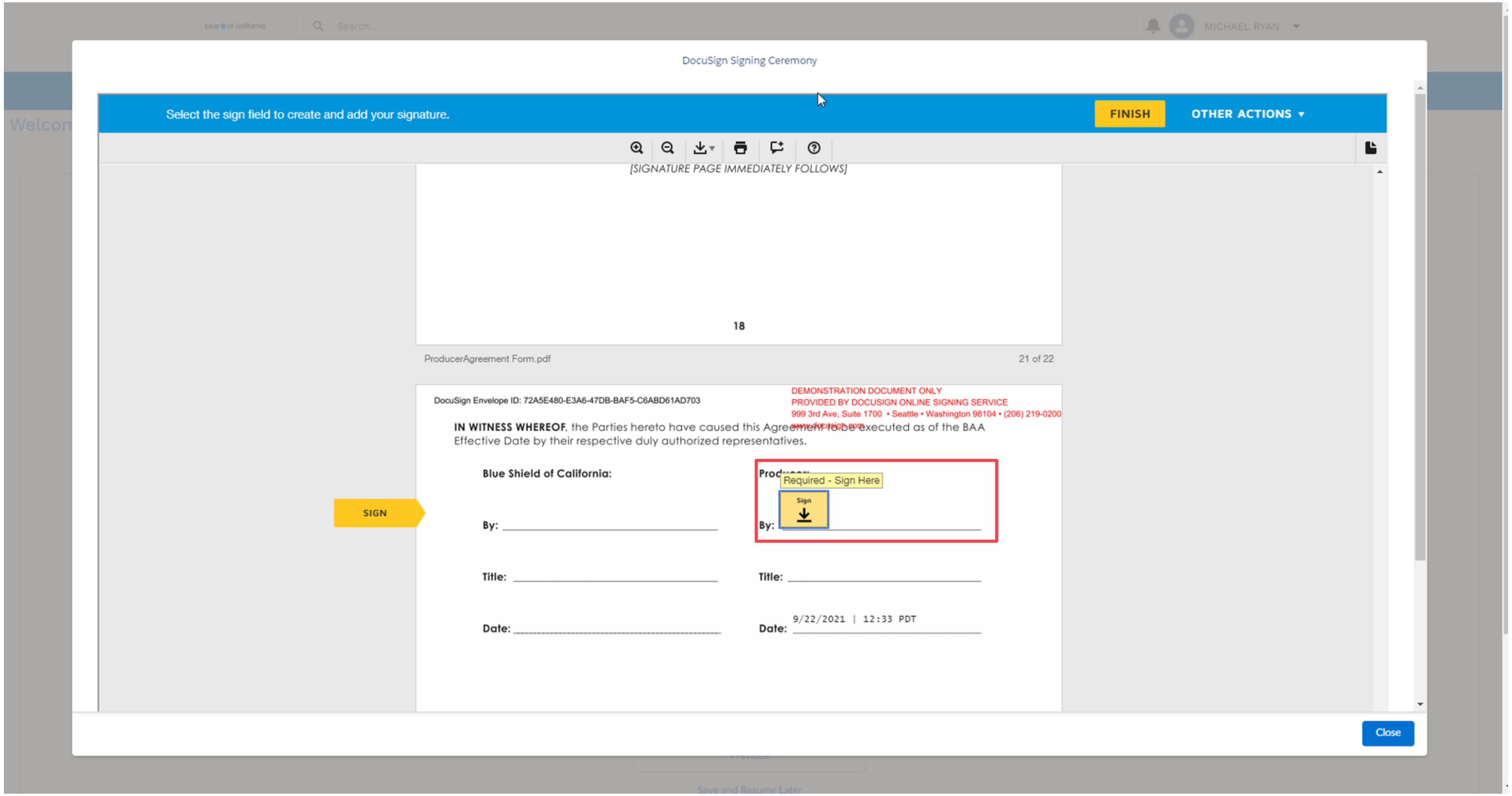
To get started, click the *Continue* button.



Broker Agreement

Step 13:

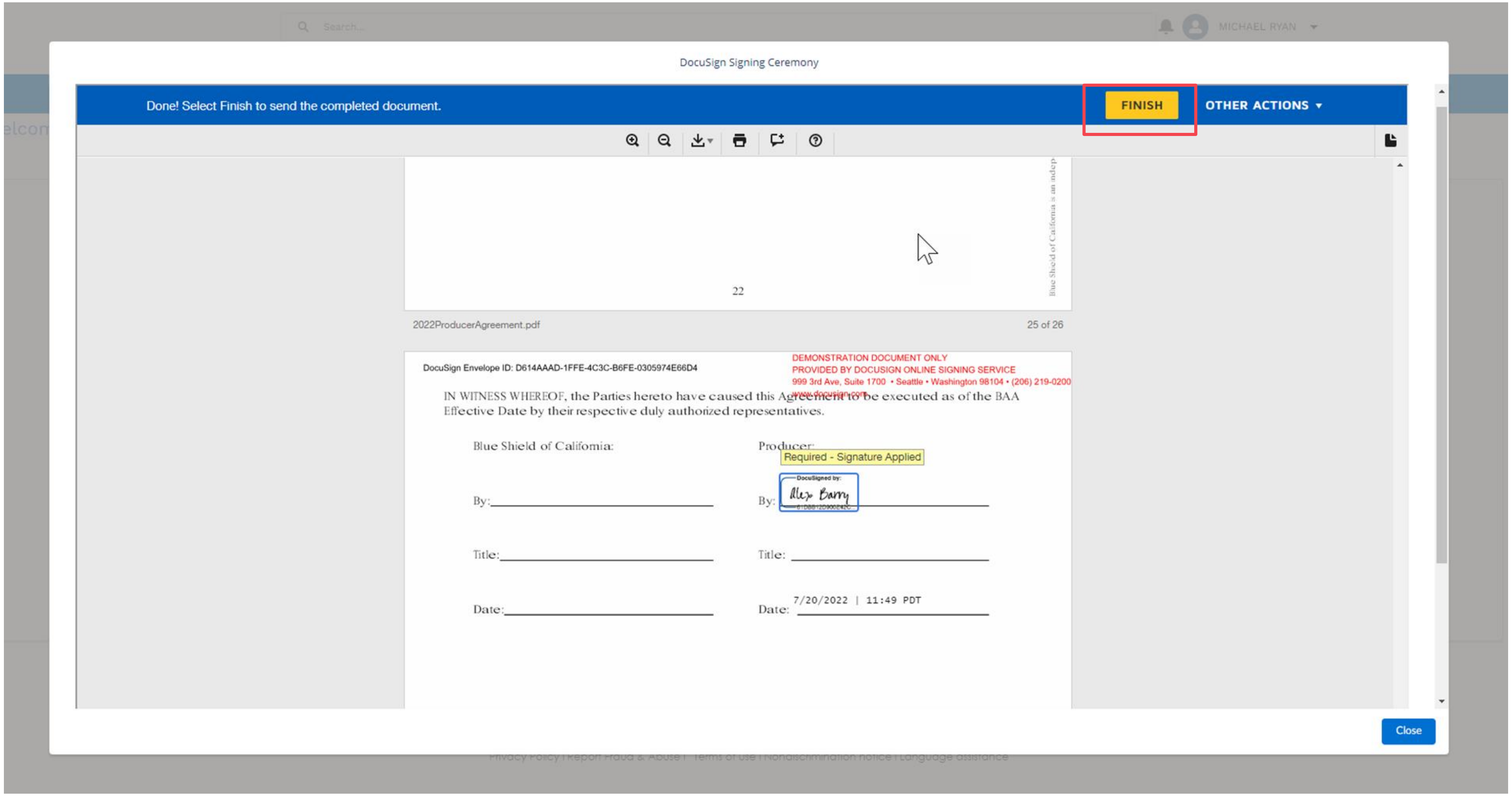
Click the *Sign* button to apply e-signature.



Broker Agreement

Step 14:

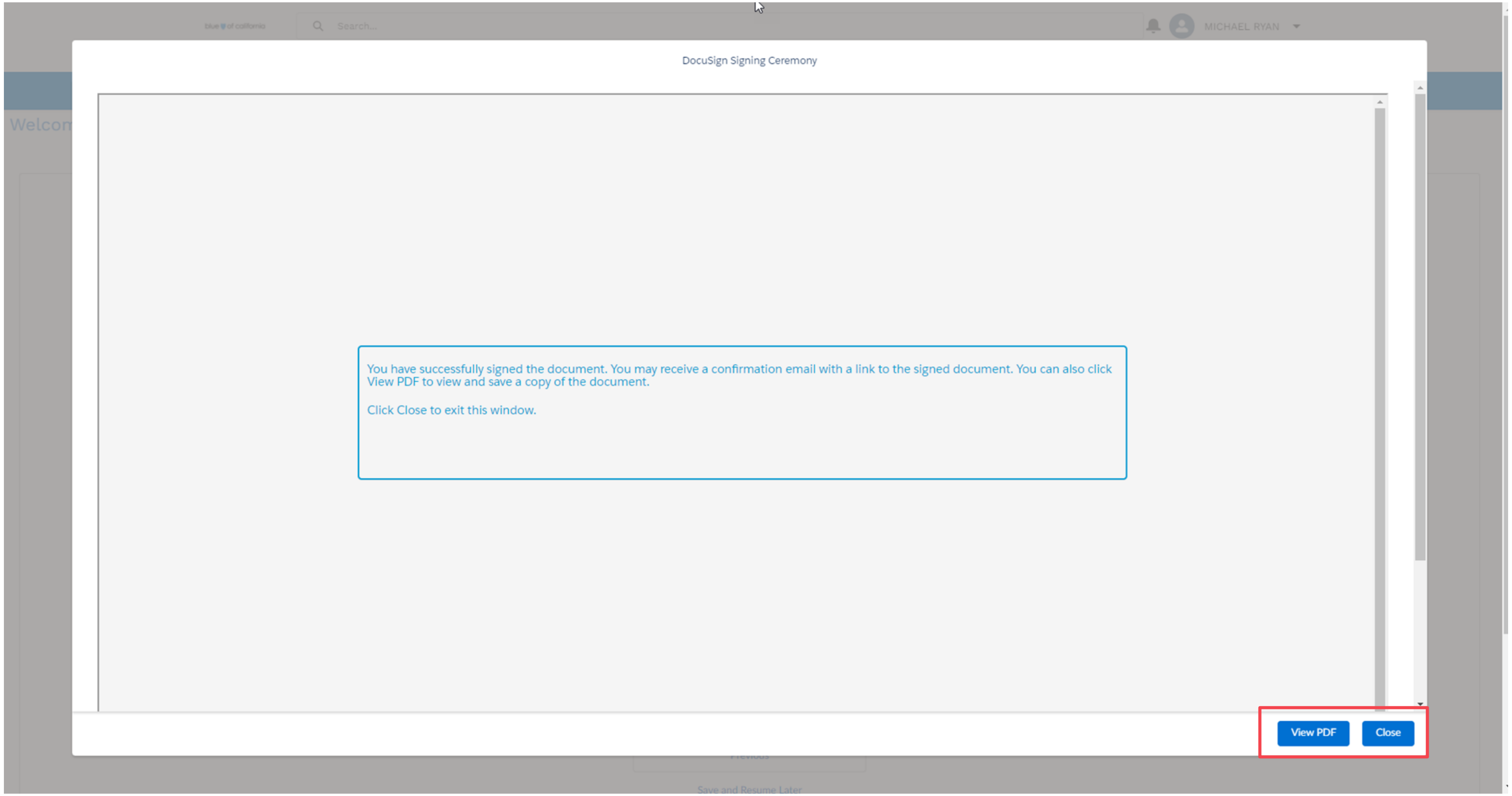
Click the *Finish* button.



Broker Agreement

RESULT:

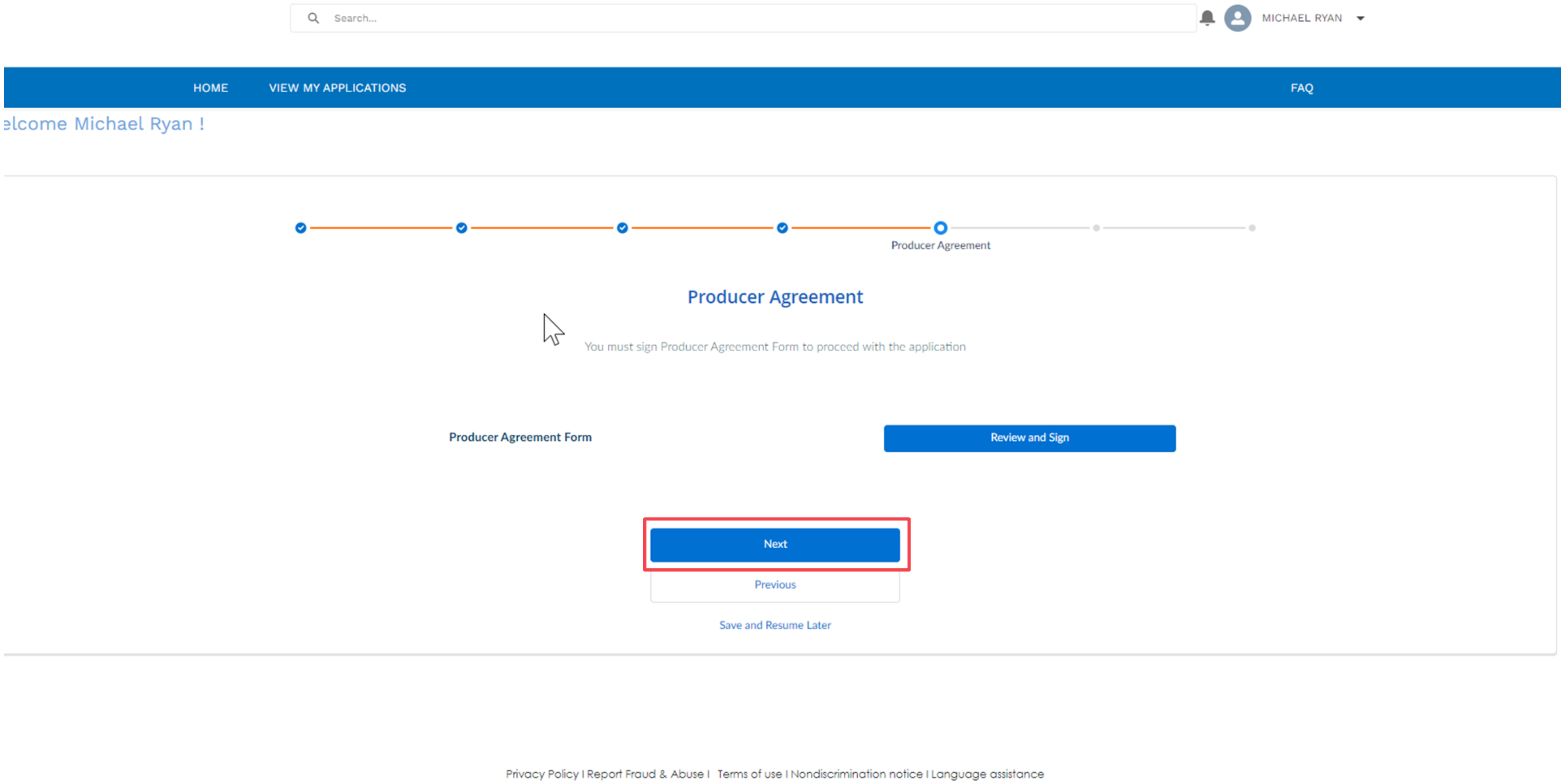
A confirmation appears when successfully signed. Choose to View the completed Producer Agreement in PDF or click *Close* button.



Broker Agreement

Step 15:

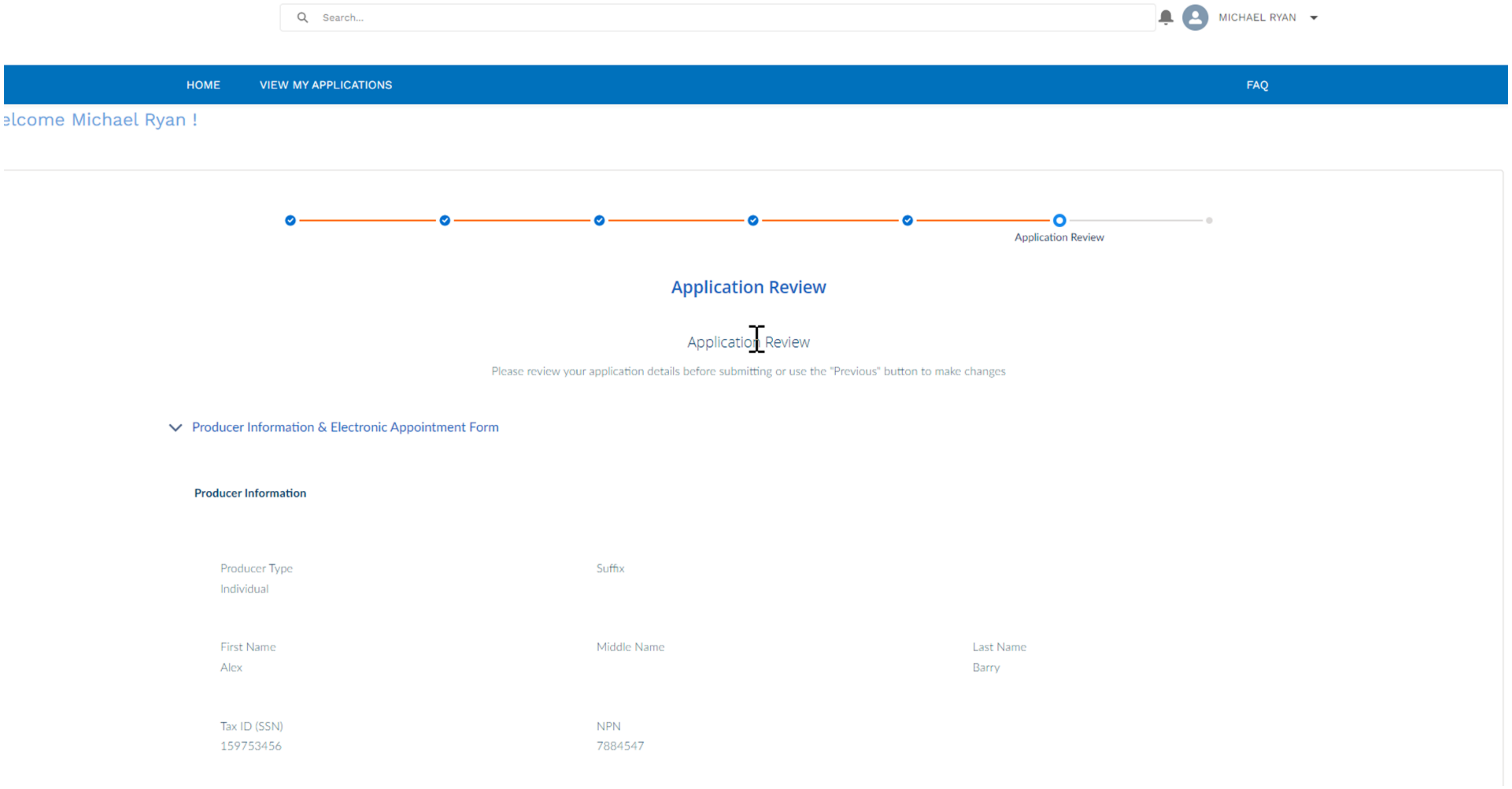
Click *Next* to review and submit the application.



Application Review

Step 16:

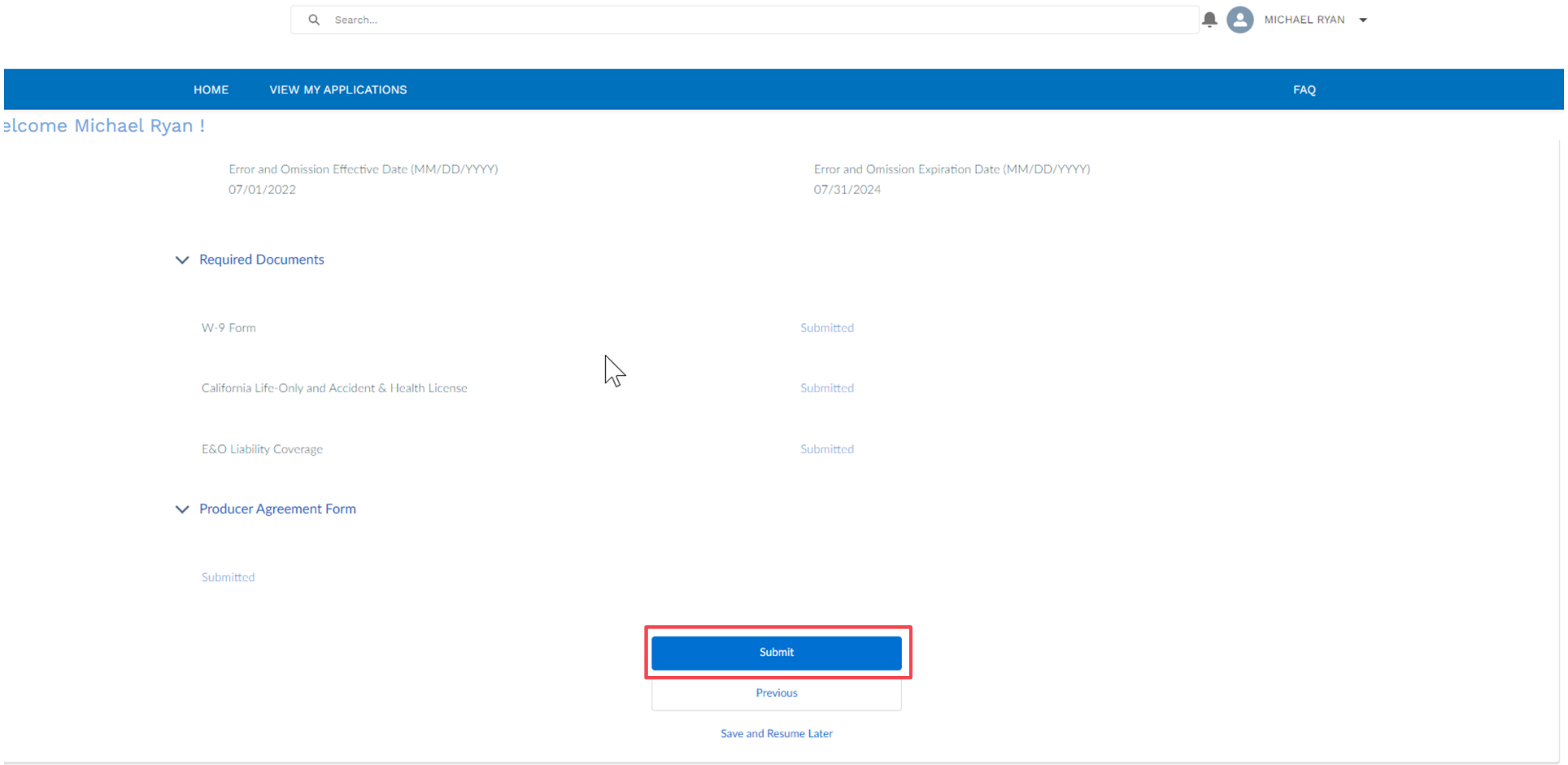
Use browser scroll bar and review application for accuracy.



Application Review

Step 17:

If satisfied all information is accurate, click *Submit* button to Blue Shield's Producer Appointment team for review and approval.



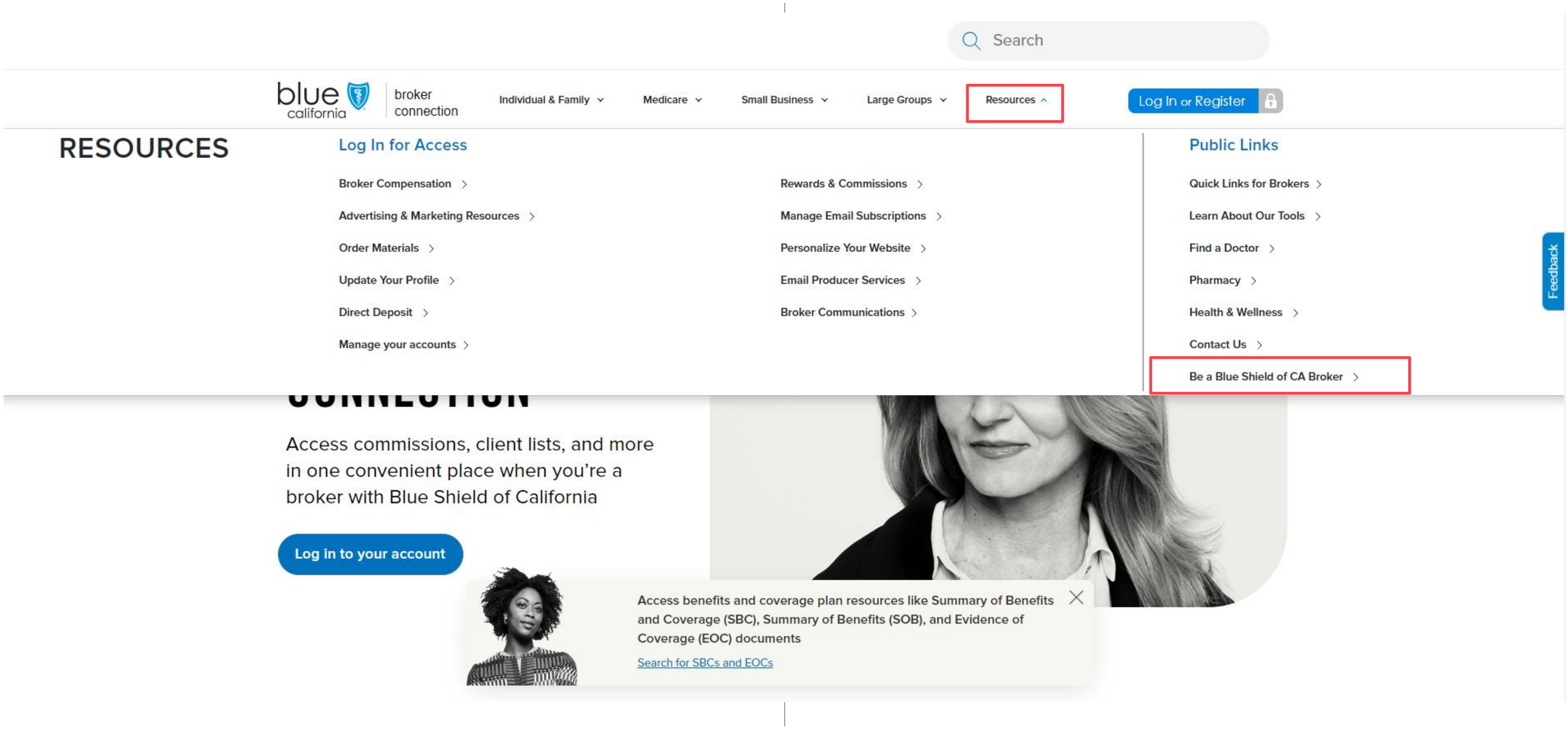
Begin

Application Status Review

In this section you will learn how view your submitted application to check the status.

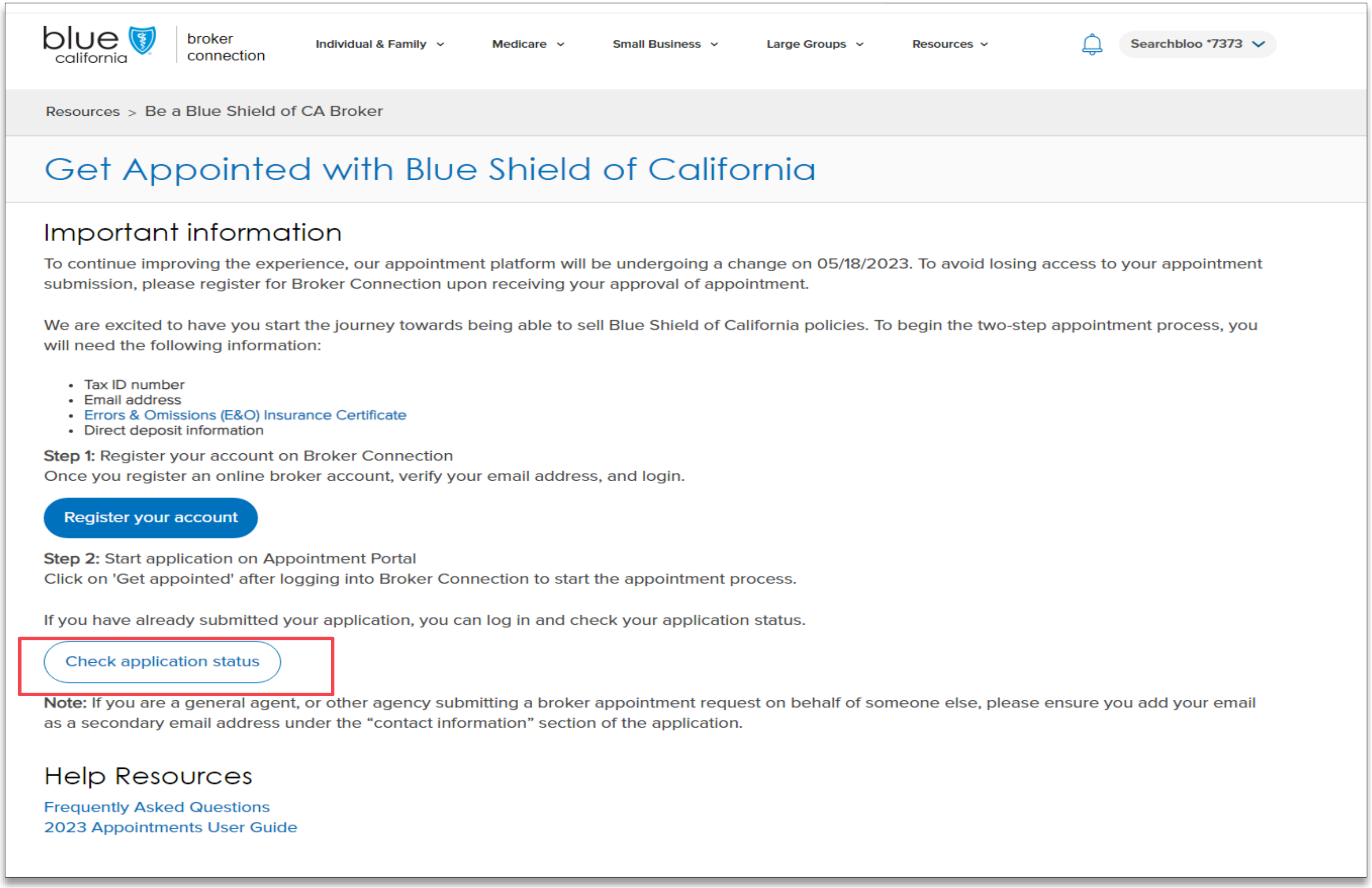
Application Status Review

Click *Resources* and *Be a Blue Shield of CA Broker* to be taken to 'Important information' page.



Application Status Review

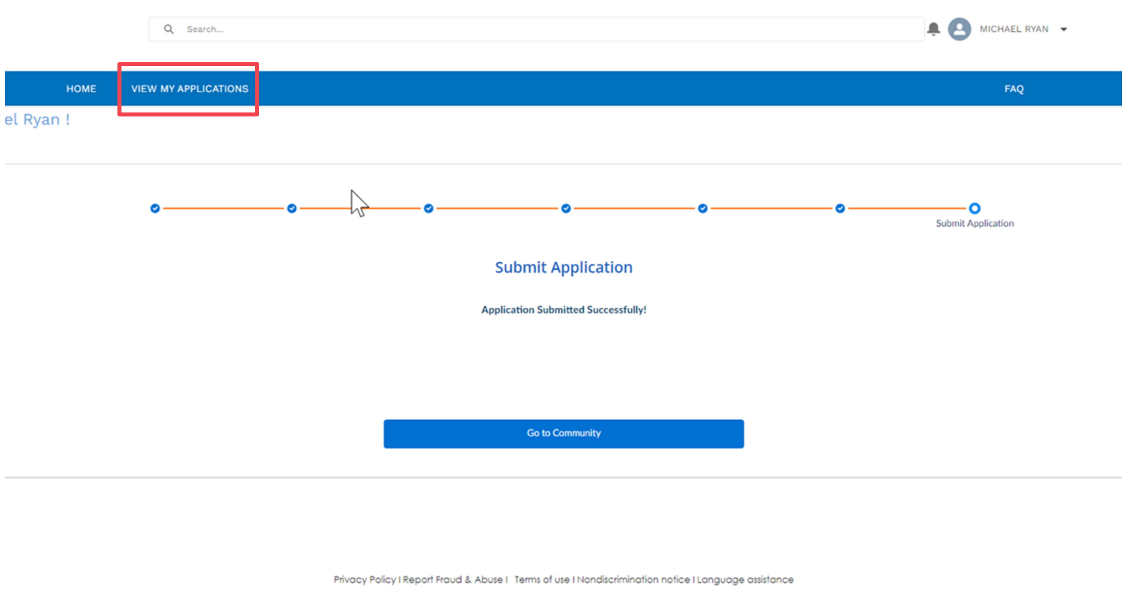
Click *Check application status* button to view the status of the application



Application Status Review

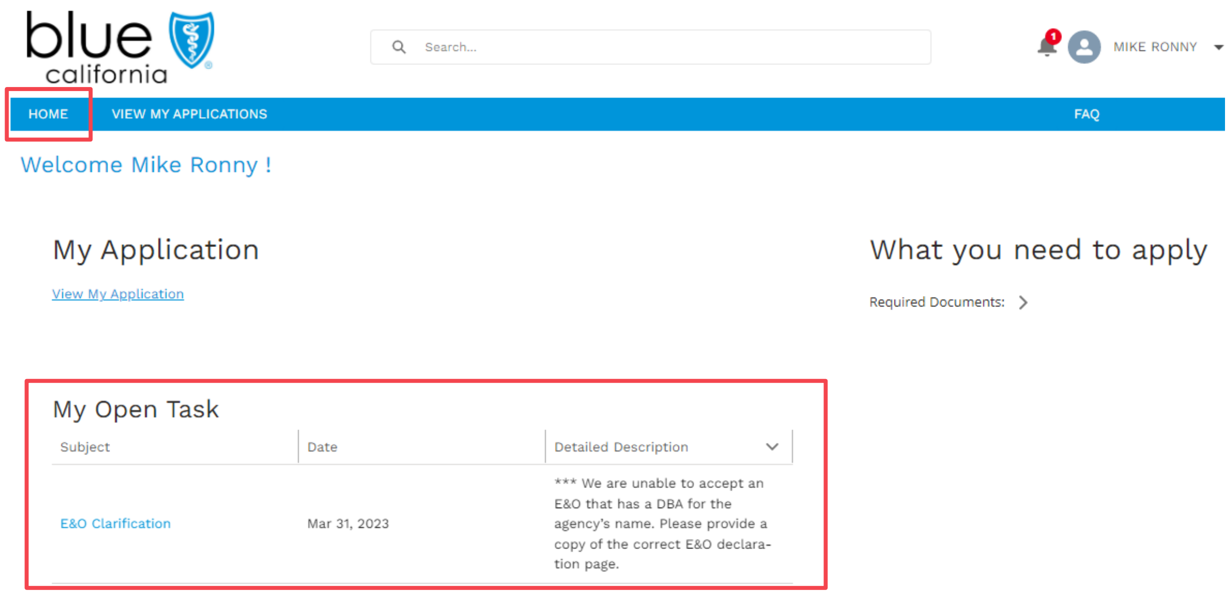
Step 1:

Click *View My Applications* to view the status of the application



Note:

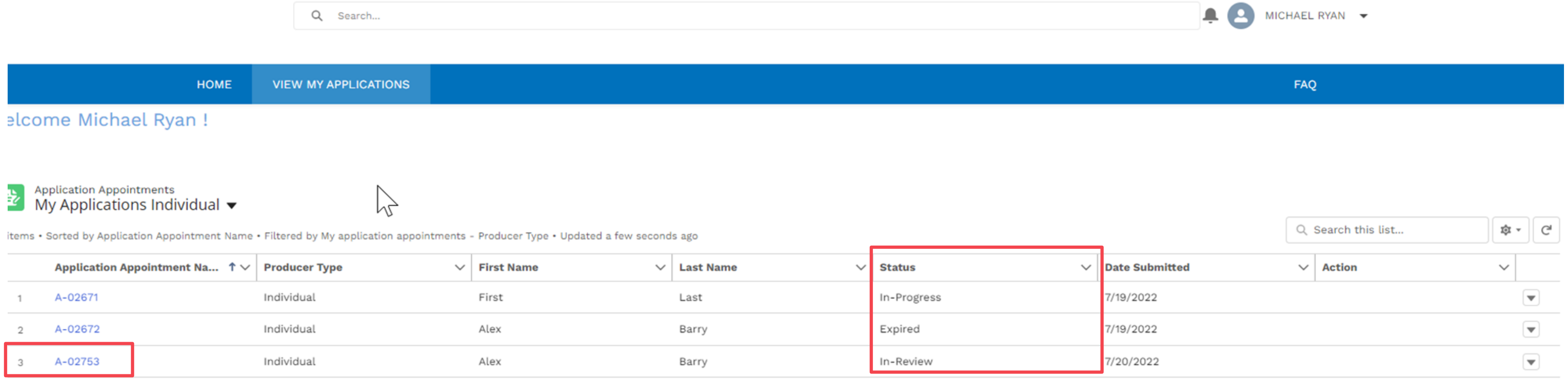
Click *Home* to check for any open tasks.



Application Status Review

Step 2:

Click *Application Appointment Name* hyperlink to view details of any application listed.



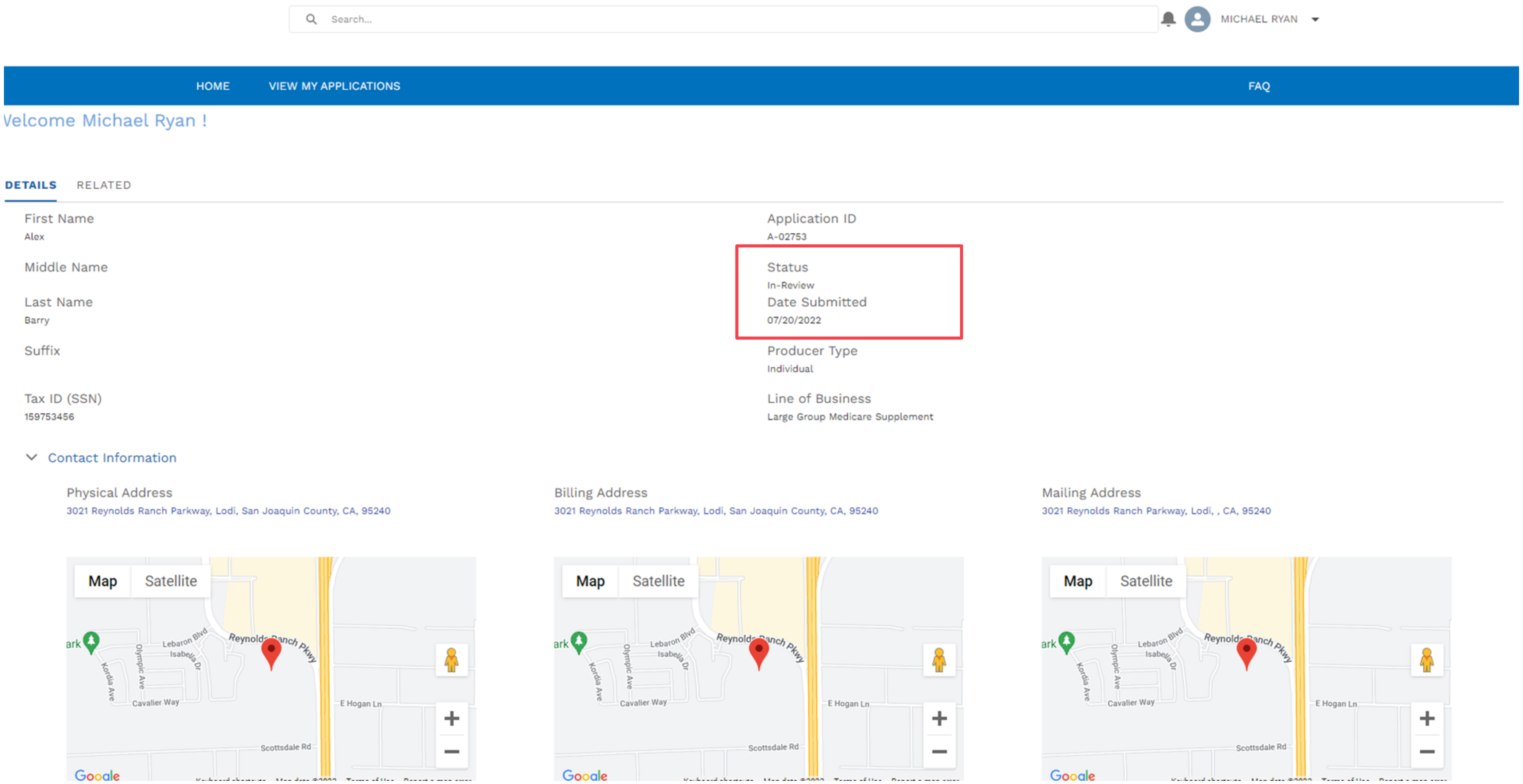
NOTE:

- Each application has a unique ID.
- Always check application status from *View My Applications* tab. All outstanding applications are found on this screen.

Application Status Review

Step 3:

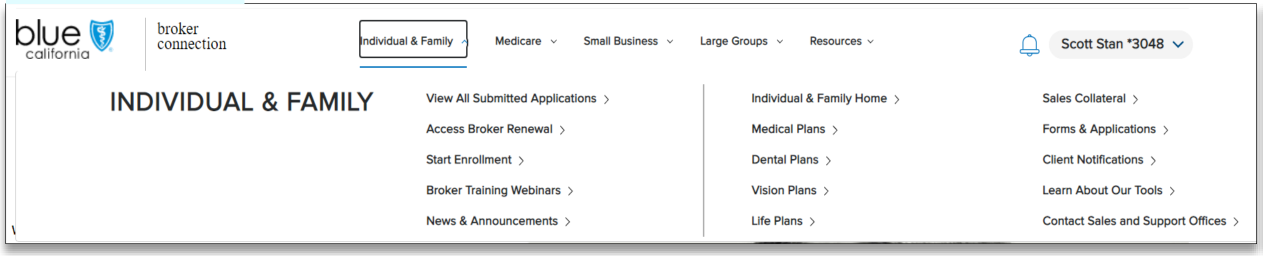
Review the application status.



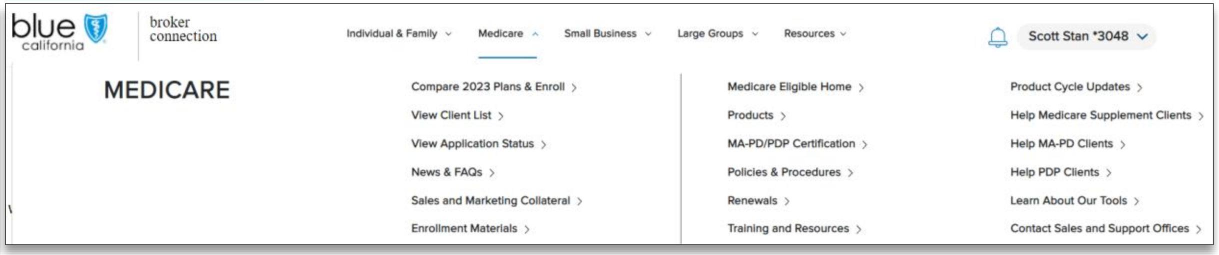
Broker Connection Access

You will get full access to Broker Connection when you are appointed and receive your Welcome email.

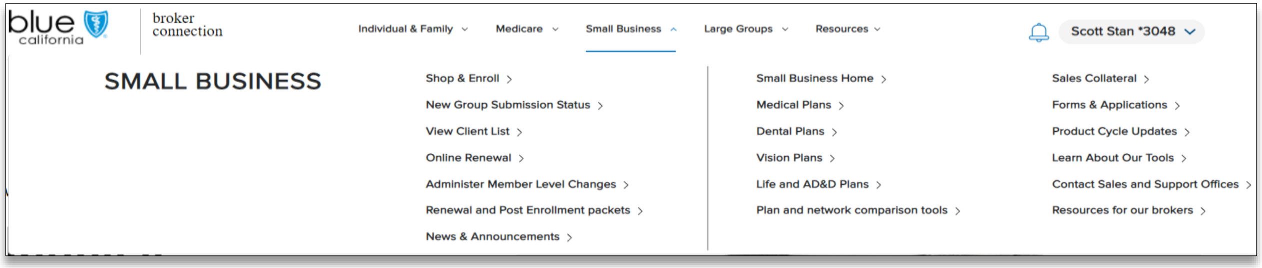
IFP



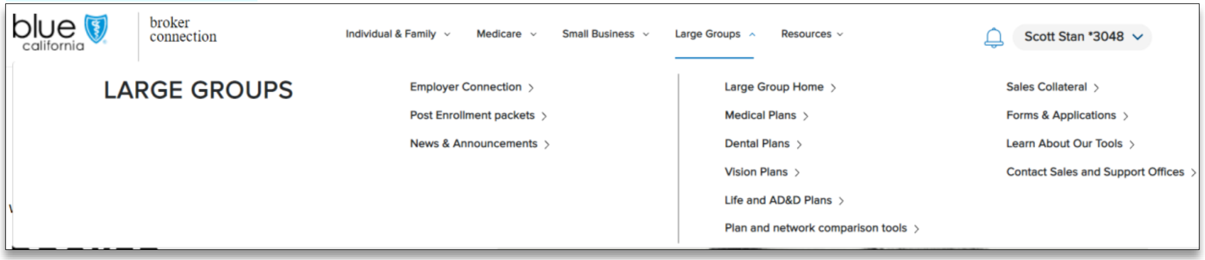
Medicare



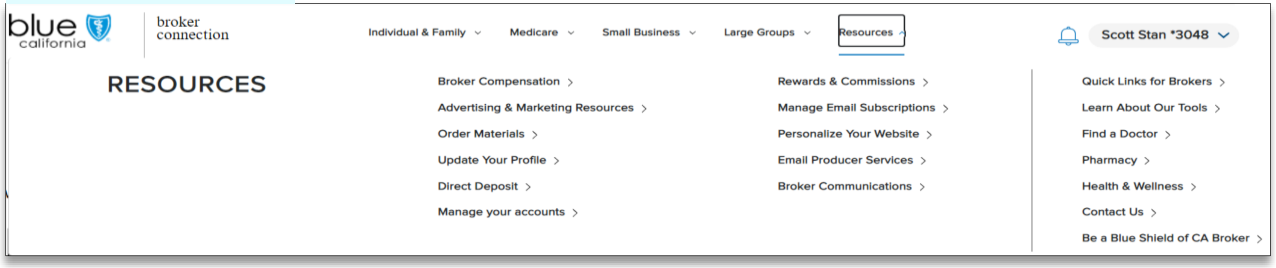
S&B



Large groups



Resources



blue california