

Appointment Automation FAQ

Q: If I am already appointed, how do I register?

A: Navigate to blueshieldca.com and click the Brokers link in the upper right-hand corner.

Then click Get appointed under Become a Blue Shield broker.

Click on Register your account.

Select the LOB on the first page.

In second page deselect the check box Get appointed with Blue Shield of California and broker is diverted to existing flow.

Q: If I choose not to merge my existing account, can I merge it later?

A: Yes, you can. You can always merge your account later.

Q: Once my account is merged, can I unmerge the account?

A: No.

Q: If I already have an existing account, but I don't remember my username or password. Can I update my both username and password at the same time?

A: Yes, using "Forgot your username?" and "Forgot your password?" Links.

Q: Once I'm appointed, how soon can I get full access to Broker Connection.

A: Full access will be given when you receive your welcome email.

Q: I no longer have an active appointment with Blue Shield of California. Do I still have access to Broker Connection?

A: Yes, with limited access. You can still have access.

Q: I'm a retired person with limited access, what kind of access do I have?

A: Retired broker will have access to below

LOB	Links
IFP	Online client list
	Sales Collateral
	Training webinars
Medicare	View client list
	Sales and Marketing Collateral
	Enrollment materials
Small business	View client list
	Employer connection

Large groups	Employer connection
Resources	Broker Compensation
	Advertising & Marketing Resources
	Order Materials
	Update Your Profile
	Direct Deposit
	Manage Broker Accounts
	Rewards & Commissions
	Manage Email subscriptions
	Personalize Your Website
	Email Producer Services
	Contact Us/Live Chat
	Broker Communications

Q: I'm no longer appointed with Blue Shield of California. Do I still have access to view my compensations on Broker connection?

A: No

Q: When did the SSO go live for Broker Connection and Brokers Appointments?

A: 06/01/2023.

Q: If I register and do not follow through getting appointed, will my registration expire?

A: Inactive registered accounts will expire in 13 months.

But can be reactivated, using Forget your password link.

Q: What documents are needed to become appointed with Blue Shield of California?

A: Required documents are:

- o **Producer Agreement** – you will need to complete, sign & date, then submit the electronic form online.
- o **E&O** – you will need to upload your E&O Declaration page. Blue Shield of California requires your E&O declaration page with the start and end dates along with the minimum amounts of 1 million Specific and 1 million Aggregate and must be active on the appointment submitted.
- o **W-9** – you will need to complete, sign & date, then submit the electronic form online. The SSN/EIN on the W-9 form must match the SSN/EIN on the Producer Agreement electronic form.
- o **License** – you will need to upload your certificate copy of your active Accident & Health or Sickness and Life license, and it must be active for more than 30 days from when you submit your appointment request.
 - An individual appointment: requires your individual license.
 - An agency appointment requires the agency license.

- **Direct Deposit information** – all commission pay via direct deposit, and you will need to provide your banking information via the electronic form embedded into the appointment request.

Q: If I can't submit my appointment request online, are appointment paper forms available to submit?

A: No, Blue Shield of California no longer accepts paper appointment requests. If you are having difficulties in submitting your appointment request, we have dedicated specialists ready to help you.

https://www.blueshieldca.com/bsca/bsc/wcm/connect/broker/broker_content_unauth_en/broker/homepage

Apply at: [Be a Blue Shield of CA Broker - Producer Connection \(blueshieldca.com\)](https://www.blueshieldca.com/bsca/bsc/wcm/connect/broker/broker_content_unauth_en/broker/homepage)

Q: Can I be appointed with Blue Shield of California if I don't have a physical address and only have a P.O. Box address?

A: No, Blue Shield of California does require a physical address to be provided for all appointing agents/agencies, even if no mail is delivered to the physical address.

Q: Does Blue Shield of California require a direct individual appointment if I only want to sell Medicare Advantage Prescription Drug/Prescription Drug Plan (MAPD/PDP)?

A: Blue Shield of California will allow agents who are endorsed and certified to write under the endorsing agency. However, any agent who is not endorsed by the agency; but certified, will be required to complete an appointment request directly with Blue Shield of California.

Q: Why do I need to be appointed directly with Blue Shield of California, if I only want to sell Covered CA?

A: Yes, Covered California does require all certified agents to be directly appointed with the carrier they are writing with. For further clarification, please contact Covered California directly.

License

Q: Why can't I be appointed with Blue Shield of California, if my license expires in less than 30-Days?

A: All agents must have a current Life and Accident & Health or Sickness license and must be active for 30 days from the date we receive your appointment request. We understand completing required continued education to renew your license and having the license renewal updated by the California Department of Insurance can take 30 days or more, causing an active Blue Shield of California appointed agent/agencies status to become suspended.

Q: Why do I need to have a Life license when I only plan on selling Health Insurance?

A: The reason we require all agents and or agencies submitting a Blue Shield of California appointment request to be licensed for both Accident & Health and Sickness as well as Life is because for most lines of business, we offer life ancillary products alongside our medical plans. Once appointed, we do not monitor or restrict submissions to ensure you are only writing medical insurance plans.

- Q:** Can I be appointed with Blue Shield of California if I live out of state, or must I reside in CA?
- A:** Blue Shield of California does accept out of state agents/agencies to appoint if they have an active non-resident license for Accident & Health or Sickness, as well as a Life license in California.
- Q:** Can I use my individual license when appointing my agency, if I have the agency name as a Doing Business As (DBA) listed?
- A:** No, Blue Shield of California does require an agency's California Life and Accident & Health or Sickness licenses when requesting to appoint the agency itself.

Errors and Omissions (E&O) Declaration Page

- Q:** What are your required dates of coverage and amounts for the Errors and Omission (E&O)?
- A:** Blue Shield of California requires a copy of your active E&O declaration page with the start and end dates along with the minimum amounts of 1 million Specific and 1 million Aggregate worth of coverage and, must be active on the date the appointment application is submitted.
- Q:** Can I use my E&O binder since I have not yet received the E&O declaration page?
- A:** No, Blue Shield of California does require the E&O declaration page as we do not accept a binder copy.
- Q:** Can I use an agency's Errors and Omissions (E&O) Declaration page when appointing?
- A:** Yes, if you provide us an agency E&O, you must also provide an E&O cover letter on the covered company's letterhead, stating they will cover you as an individual under their E&O policy or, if said agency, has endorsed you on your California Department of Insurance license, we will also allow the use of the agency's E&O Declaration page.
- Q:** Why does my E&O Declaration page have to have my name match exactly how it is written on my license, including any suffixes?
- A:** Blue Shield of California does require the name on the E&O Declaration page or cover letter of an agency's letterhead to show the name as written on the license, including any suffixes because we need to ensure that the E&O covers the appointing agent.
- Q:** What if I only have one E&O policy that I use for both me, individually, and my agency?
- A:** Blue Shield does not accept an individual E&O policy as coverage for an agency. We do not accept an E&O that has a DBA acronym for the agency's name. However, if the E&O has both your individual name and the agency name without a DBA acronym in front of the agency name, we will accept it as coverage for both.

W-9 form

- Q:** Why do I need to submit a W-9 if commission will be paid to my employer?
- A:** Blue Shield of California requires all appointing agents to submit a W-9 with the SSN/EIN to match that of the Producer Agreement. Even if you plan to have your commissions paid to an agency who is your employer. When submitting business, you must make sure you are only submitting business using the agency's FEIN to ensure commissions are paid to the

agency and not to your personal SSN, causing a potential 1099 to be sent with your personal SSN. If you still have questions on this, to contact our specialist who are ready to help you just go to:

https://www.blueshieldca.com/bsca/bsc/wcm/connect/broker/broker_content_en/resources/contactus

Q: If I only write on-exchange business via Covered California (CCA), and I have already designated an agency as the payee, why do I need to provide a W-9 with my SSN?

A: Blue Shield of California requires all appointing agents to submit a W-9 with the SSN/EIN to match that of the Producer Agreement. If you have already designated the agency as your payee with CCA, then, when we receive the feed from CCA, commissions will be paid to the designated payee. It is still our requirement to have a W-9 on file for all appointed agents in case they ever submit business directly with Blue Shield of California.

Front Line Representative Trouble shooting

Q: How does a broker check for status of appointment request?

A: Our Automation Appointment process allows brokers to log back into their application to view real time status.

Q: It's been a week since I submitted my application, why haven't I heard back?

A: Broker should log back into their online application to make sure application did not come back to them for additional information. Brokers get an email notification, and a new task is created in their application home screen identifying additional information needed.

Q: Why do I have a NIPR open task? How do I fix it?

A: After submitting the full application, within a few minutes, the broker will get an email and a new task will be created in their application home screen stating Producer Information not found or No match found. The broker must log back into their online application to view their open task found on their home screen. Click on the link under open task; review and make necessary corrections. The

National Insurance Producer Registry (NIPR) validation uses the NPN, SSN/EIN, License, and Name to validate broker's information.

Q: Does the automation system accommodate an FMO, TMO, super producer, general agency, or other agency that a broker works with and needs to keep track of their subagent's appointment status?

A: When a Field Marketing Organization (FMO), Third Party Marketing Organization (TMO), Super Producer, General Agent, or other agency wants to submit an appointment request on behalf of their sub agent, the appointment automation process will allow this as follows:

Have the agency register the broker using the appointing broker's first and last name and the agency' email address.

- o This will allow application communications to be sent to the agency, therefore allowing the agency to keep track of the agent's appointment status.
- o We, as appointment processors, can see the email address used to register with and can take the extra steps to copy the agency email on the welcome emails.
- o After the agency has successfully registered the broker on the Home Screen, click on "Start My Application"
- o The agency needs to use the appointing agent's own contact information and demographics to ensure the correct details populate on the application and feed into the ICM appointment.