

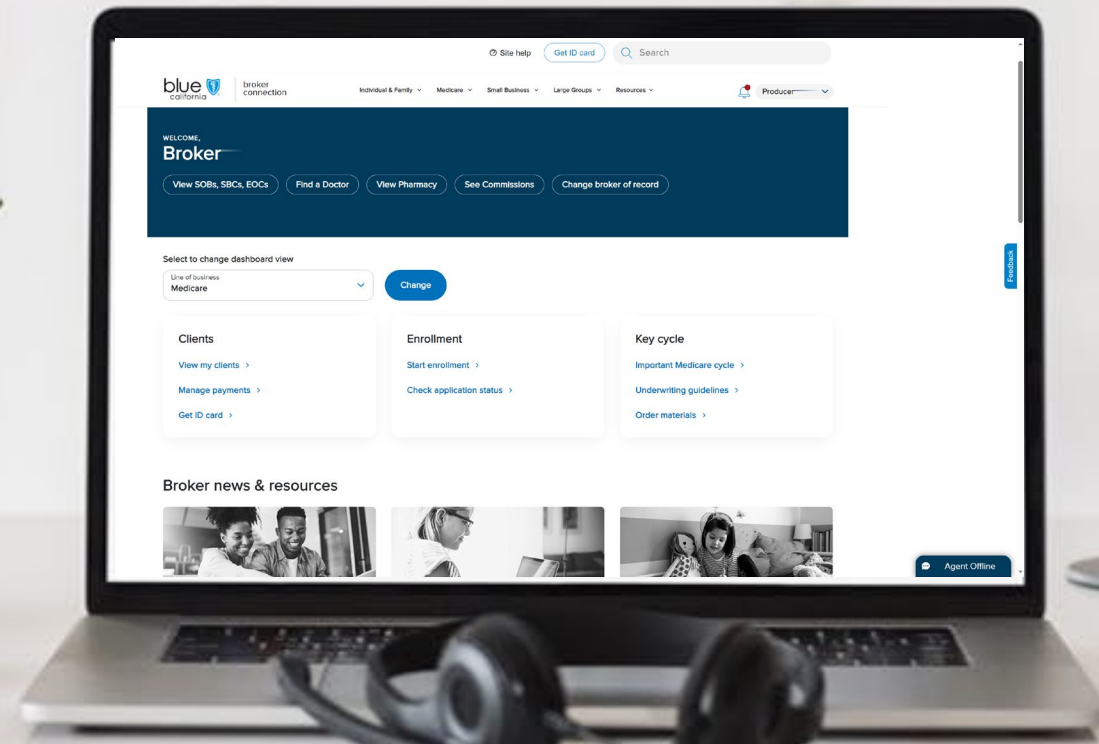
Broker Connection Site

Quick Reference Guide

Y0118_24_679A_C 10012024

H2819_24_679A_C 10012024

[View Quick Reference Guide](#)



Welcome to Broker Connection

Access commissions, client lists, and more in one convenient place with Broker Connection.

Your Broker Connection account provides access to:

- [Application Status](#)
Check updates on client applications with more status detail.
- [Late & cancellation notifications](#)
At a glance, see who's late and if their policy is canceled. Send reminders to your clients with a click.
- [Email ID card links](#)
Get clients using their coverage right away by emailing a link to their member ID card.
- [Commissions quick links](#)
Access your latest commissions statement from the homepage after logging in.

Who can create a Broker Connection account?

Only brokers already appointed with Blue Shield of California can create Broker Connection accounts.

They may be independent brokers or brokers who own the tax ID number of their agency.

If you are not appointed with Blue Shield of California, you must be associated with an agency (Primary Agent) who is appointed with Blue Shield to create a Broker Connection account.

Account Profile Descriptions

Account Profiles

	Support staff	Sales agent	Subagent	Administrator	Primary agent*
Order sales materials	✓	✓	✓	✓	✓
Use enrollment tools	✓	✓	✓	✓	✓
Access their client list		✓	✓	✓	✓
View their commissions		✓	✓	✓	✓
View application status		✓	✓	✓	✓
Access agency client list			✓	✓	✓
View agency commissions			✓	✓	✓
Create and manage user accounts				✓	✓
Update agency profile					✓
Change direct deposit details					✓

✓ Optional

*Primary agents can create up to 4 other primary agent accounts.

The table below shows what each account profile can do on Broker Connection.

There are 5 types of profiles for Broker Connect accounts.

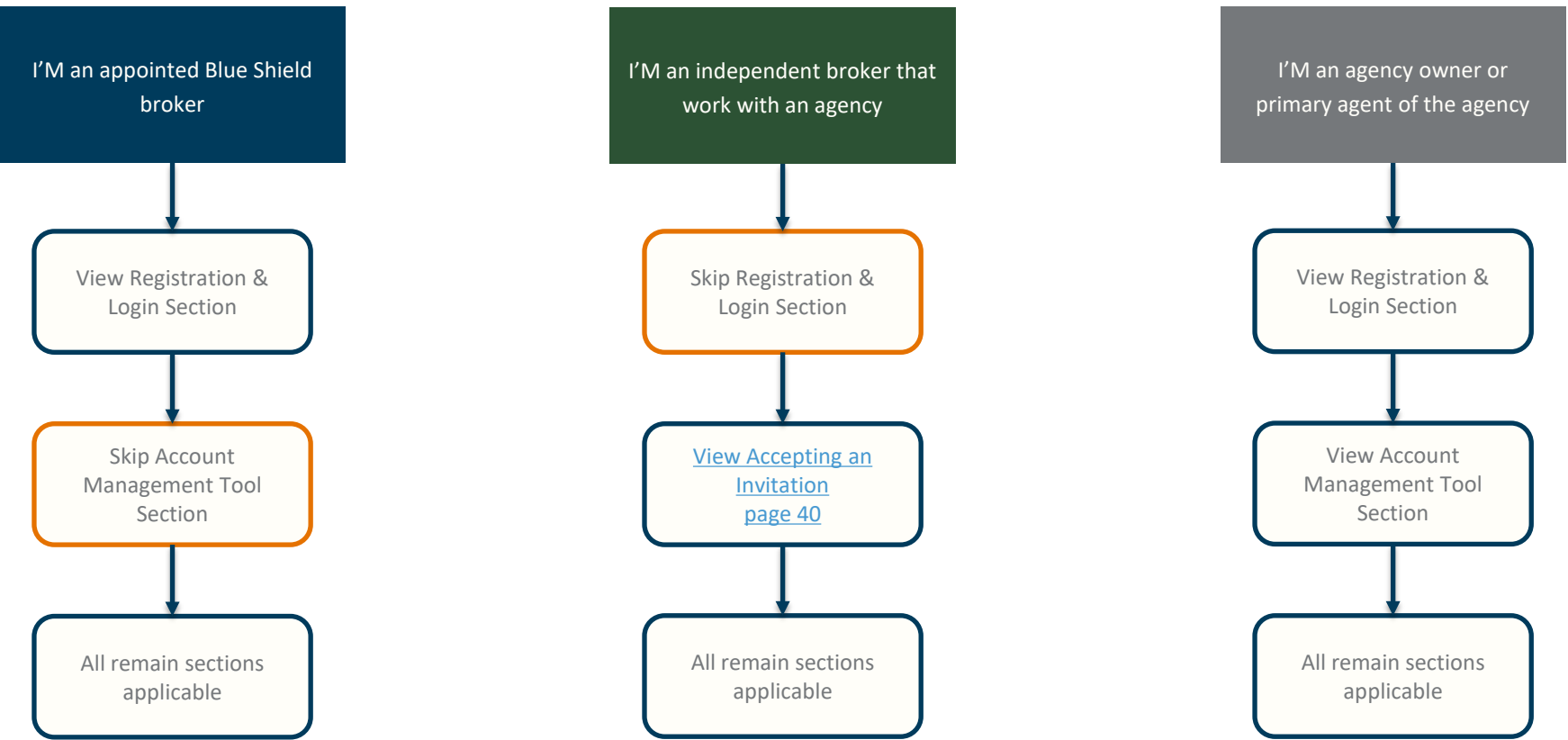
By default, if you are an appointed Blue Shield broker that is registering for an account for the first time and is not affiliated with an agency, your account profile is automatically set to the highest profile – "Primary Agent role".

Agency Owners and Primary Agents can invite brokers to create an account that is affiliated with their agency and assign a specific role for that individual.

Note:

If you are not appointed with Blue Shield of California, you must be associated with an agency (Primary Agent) who is appointed with Blue Shield to create a Broker Connection account.

Using this Quick Reference Guide



Section to View

This guide is written for all audiences and some section may not apply to you.

Please refer to the recommended guidance pathways for using this quick reference guide.

Broker Connection Benefits

Your Broker Connection account provides many essential benefits including:

- **Single location to access sales collateral**
Quickly and easily access commonly used sales materials including Benefit Highlight brochures, marketing brochures, and much more.
- **Manage your book of business**
A single location to compare plans and enroll clients, view application status and client list, and access commission statements.
- **Get the latest Blue Shield Marketing Newsletters and Mandates Information**
Find details and resources on mandates impacting your clients and important updates from Blue Shield.

[Link to Broker Connection](#)

[Blue Shield Broker Connection site:](https://www.blueshieldca.com/producer)
<https://www.blueshieldca.com/producer>

[Blue Shield Producer Services](#)
Phone Number:
1-800-559-5905

Broker Connection Registration Experience

Blue Shield of California

[View Section](#)



Registration Options

AA Increase Text Size



broker connection

Individual & Family Medicare Small Business Large Groups Resources

Search

Login or Register



Option 2

WELCOME TO

Broker Connection

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

Log in to your account



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two-step appointment process on our resources page](#).

Join us and watch your business grow.

[Get appointed >](#)



Option 1

Registration Options

Option 1:

Apply for appointment and register.

To become a Blue Shield Broker, you must first create an account and have your account appointed.

Option 2: Create an Account

Anyone can create a Broker Connection account. However, your account must be appointed to gain full access to all of our products.

Non-appointed broker

If you're not appointed with Blue Shield but work for a broker who is, ask that broker to create a Broker Connection account for you.



Broker Connection Registration Experience

Option 1: Apply for Appointment

AA Increase Text Size

blue shield of california | broker connection

Individual & Family | Medicare | Small Business | Large Groups | Resources


Search Login or Register

WELCOME TO

Broker Connection

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

Log in to your account



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two-step appointment process on our resources page](#).

Join us and watch your business grow.

[Get appointed >](#)

1

Register

- 1. Navigate to the Broker Connect homepage and click the **Get Appointed** button.

Broker Connection Registration Experience

Option 1: Apply for Appointment

Step 1: Start application on Appointment Portal

Click on 'Get appointed' to start the appointment process.

If you have already submitted your application, you can log in and check your application status.



Step 2: Register your account on Broker Connection

Once you register an online broker account, verify your email address, and login.

If you have already submitted your application, you can log in and check your application status.



Note:

Agents already appointed with Blue Shield of California will be able to create an account on Broker Connection with access to all its tools and resources.

It takes about 5 minutes and 6 quick steps to register as an agency principal/broker on Broker Connection.

Important:

If you are a general agent, or other agency submitting a broker appointment request on behalf of someone else, please ensure you add your email as a secondary email address under the "contact information" section of the application.

Apply for Appointment

Only brokers already appointed with Blue Shield of California can create Broker Connection accounts.

They may be independent brokers or brokers who own the tax ID number of their agency.


If you're not appointed with Blue Shield but work for a broker who is, ask that broker to create a Broker Connection account for you.

To [Apply for appointment](#), you will need:

- Tax ID number
- DOI (Dept. of Insurance) license number
- Email address
- Both Accident & Health or Sickness and Life licenses
- Errors & Omissions (E&O) Insurance Certificate
- Direct deposit information

Broker Connection Registration Experience

Option 2: Register and Log In

 > Welcome to Broker Connection

Welcome to Broker Connection

Log in

[Show !\[\]\(2425a24eb19e1259aa2d96cc73bf5ae8_img.jpg\)](#)

Remember my username

[Forgot your password?](#)
[Forgot your username?](#)

Create an account


A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

1

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

 This page cannot be bookmarked. See instructions for how to bookmark this page [here.](#)

Feedback

Registration Steps

1. Click the **Register Now** link to register.

Note:

To register for a Broker Connection account, you must be appointed with Blue Shield.

For endorsed agents working under an agency, please contact your Primary Agent for invite to register.

Register for Broker Connection

Important:

Regardless of the option you have chosen, you will follow the same 6 steps.



What lines of business do you sell?

Select all that apply.

2

Individual & family plans

✓

Medicare

✓

Small business

Large group

3

< Back

Continue

Registration Steps

Regardless of the option you have chosen (get appointed or register), you will follow the same steps.

This is the first of a 6-step process to create an account.

You'll see an indication bar, along the top, to let you know where you are in the process.

2. **Select the lines of business** that you sell.

At minimum, you'll need to select one, and you can select multiple lines, if you sell different lines of business.

3. Click the **Continue** button to move to the next step.

Register for Broker Connection



Registration Steps

4. Select “**Get appointed with Blues Shield of California**” option.

If you are already appointed, deselect the checkbox to continue.

5. Complete the **Tax and License information**. Required fields are marked with an asterisk (*).

6. Click the **Continue** button to move to the next step.

Note:

As a security feature, the system will validate the information with our systems.

If the information does not match what we have on file, you will not be able to proceed.

Tax and license information

Enter the tax ID number (TIN) for your agency or your Social Security number (SSN).

4

Get appointed with Blue Shield of California

Tax and license information

Enter the tax ID number (TIN) for your agency or your Social Security number (SSN).

5

Get appointed with Blue Shield of California

6



Register for Broker Connection



Registration Steps

- 7. Complete the **Contact information**. Required fields are marked with an asterisk (*).
- 8. Click the **Continue** button to move to the next step.

Contact information

7

First name* Middle initial

Last name*

Email*

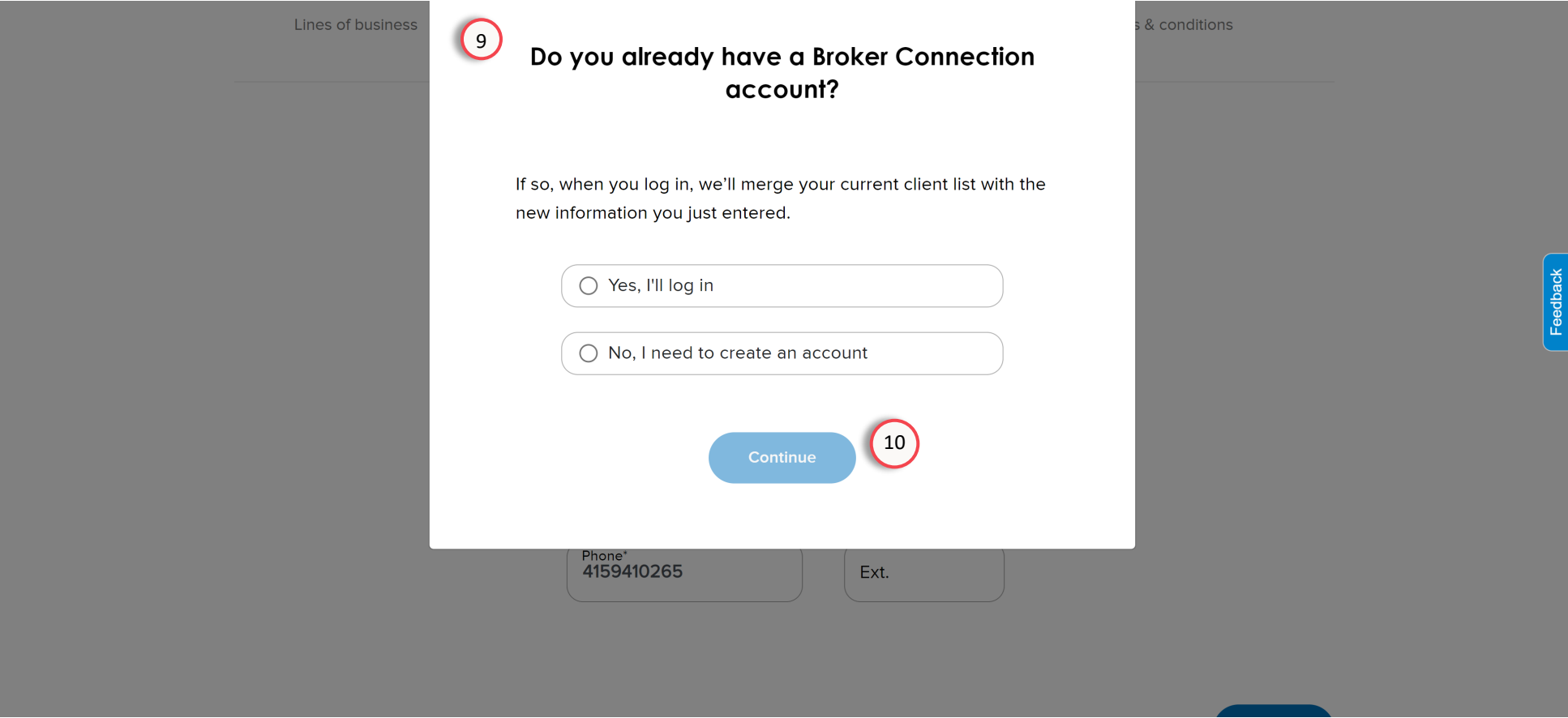
Phone* Ext.

8

Continue

Register for Broker Connection

Registration Steps



- A pop-up window will appear asking if you have a broker connection account.
- If you have a Broker Connection account, your current client list with new information you just entered will be merged.
- For the question, **select a response.**
 - Click the **Continue** button to move to the next step.

Register for Broker Connection




11

Account setup

 Create a username

Your username must have:

- 8-20 characters
- Unique identification
- Numbers and letters only
- No spaces

 Create a password [Show](#) 

Your password must include:

- 8-20 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- A number or symbol (?#!)
- No spaces

 Confirm password [Show](#) 

12

Continue

Registration Steps

If you selected no to the question, you will be prompted to create a username and password.

11. Create a **username and password**.

Guidance is provided below the field to ensure that you have a unique and secure ID and password.

12. Click the **Continue** button to move to the next step.

Register for Broker Connection



Confirm your account information

To make changes to a section, select the corresponding step above.

Tax and license info

Agency TIN	xxxx
Agency ZIP code	XXXX
DOI license number	XXXX
NPN	

Contact info

Name	Bob Smith
Phone	(415) XXXX XXXX
Phone extension	
Email	XXXX@blueshieldca.com

Account setup

Username	4BobSmtih
----------	-----------

Lines of business

Lines of business	Individual & family plans
-------------------	---------------------------

Feedback 

Registration Steps


Confirm the account information. If there are any errors, please use the back button to make edits.

- 13. Click the **Continue** button to move to the next step.

13

Continue

Register for Broker Connection

 > [Create an account](#)



Registration Steps

Review Terms and Conditions information.

14. Scroll down the page to agree to the terms and conditions.

14

Terms and conditions

To create an account, you must agree to the following terms and conditions.

Broker agreement for online access

By clicking Create account below, you agree to the following statement:

I am an authorized broker seeking access to Broker Connection to view claims, authorizations, and eligibility and benefit information for Blue Shield of California subscribers. I understand that Blue Shield of California is not responsible for any unauthorized disclosure or misuse of Taxpayer Identification Numbers (TINs) or broker identification numbers (PINs).

Register for Broker Connection


I understand that an account manager's role is to:

- Keep my organization's account information up-to-date
- Set up other users within my organization
- Supply forgotten usernames and passwords for other users
- Place a user account on inactive status (e.g., for a leave of absence)
- Manage the TINs and PINs associated with my organization (no period)

Blue Shield is not responsible for any unauthorized disclosure or misuse of TINs or PINs.

For security reasons, multiple users may not share login information. Doing so will constitute a violation of state and federal regulations and could place sensitive member data at risk.

Enter your full name and today's date to agree to our terms and conditions.

15

Continue






Registration Steps


For your digital signature, **enter your full name, and select today's date.**

15. To complete your registration, click the **Continue** button.

Register for Broker Connection



Individual & Family  Medicare  Small Business  Large Groups  Resources 

 > [Create an account](#)

You're almost done!

Check your inbox. You should have received an email requesting that you confirm your email address. The verification button will expire in 24 hours. Once you've verified your email address, return here and select Close.



If you haven't received your email confirmation, you can [send another one](#).

Registration Steps

Check your inbox for an email, requesting confirmation of your email address.

If you haven't received your email confirmation within a few minutes, you can click the link to send another verification.

16. Click the **Close** button.

Register for Broker Connection

Activate your Broker Connection account



Thank you for registering with Broker Connection

First Name: Bob
Last Name: Smith
Agency:
User name: 4BobSmith

Once you verify your email address, you can log in with your user name and password. This link will expire in 24 hours after you signed the Terms and Conditions.

[Verify Email](#) 17

Follow Blue Shield



Registration Steps

The Verification button within the email will expire in 24 hours.

Check your email inbox for the “**Activate your Broker Connection account**” email.

- 17. To complete the account creation process, **click the Verification button.**

Register for Broker Connection



Thank you for verifying your email address.
You may now log in to Broker Connection.

Log in

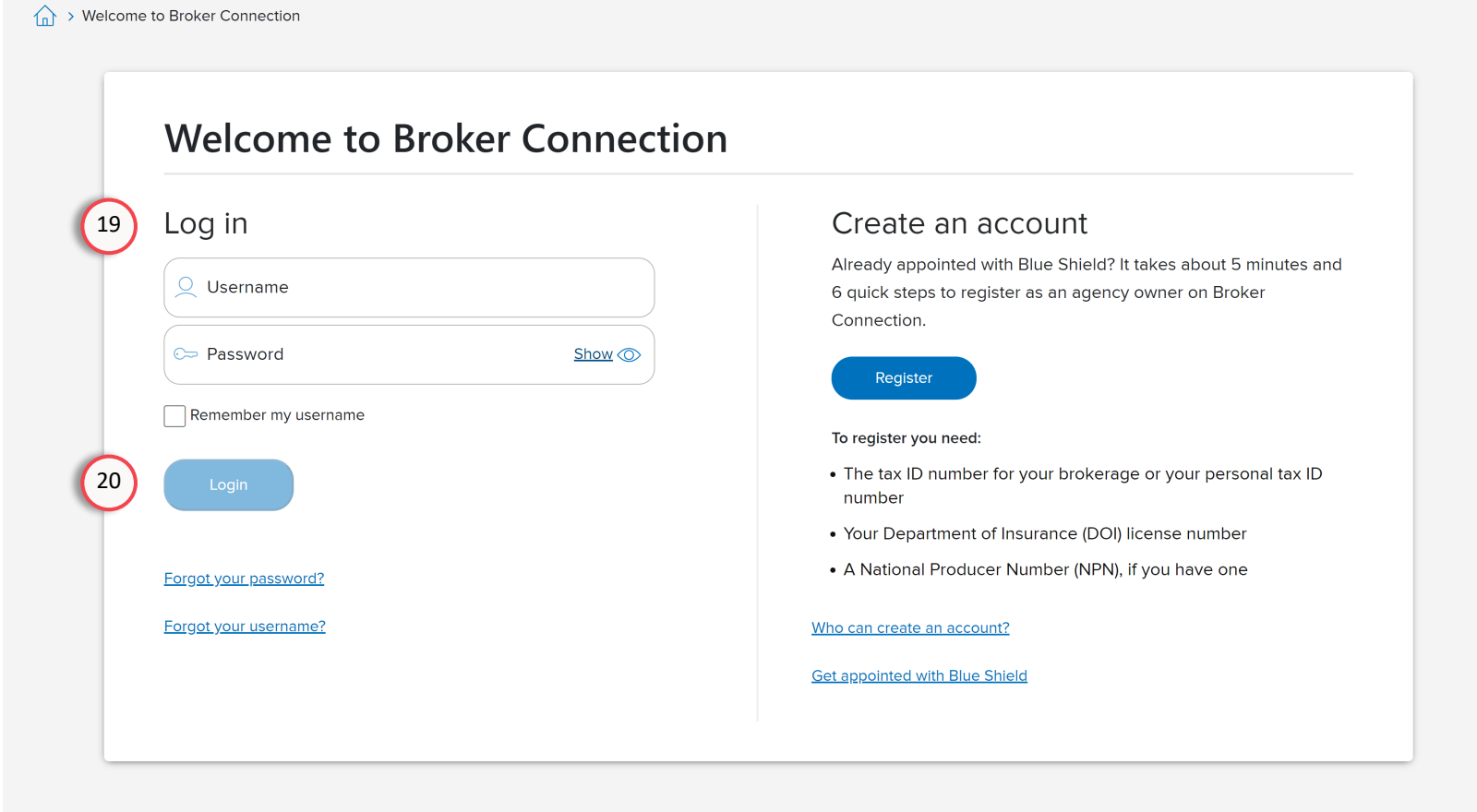
18

Registration Steps

After verifying your email address, you will see a confirmation screen indicating that you have successfully created an account.

18. To access your new Broker Connection account, **click the Log in button.**

Broker Connection



Log in

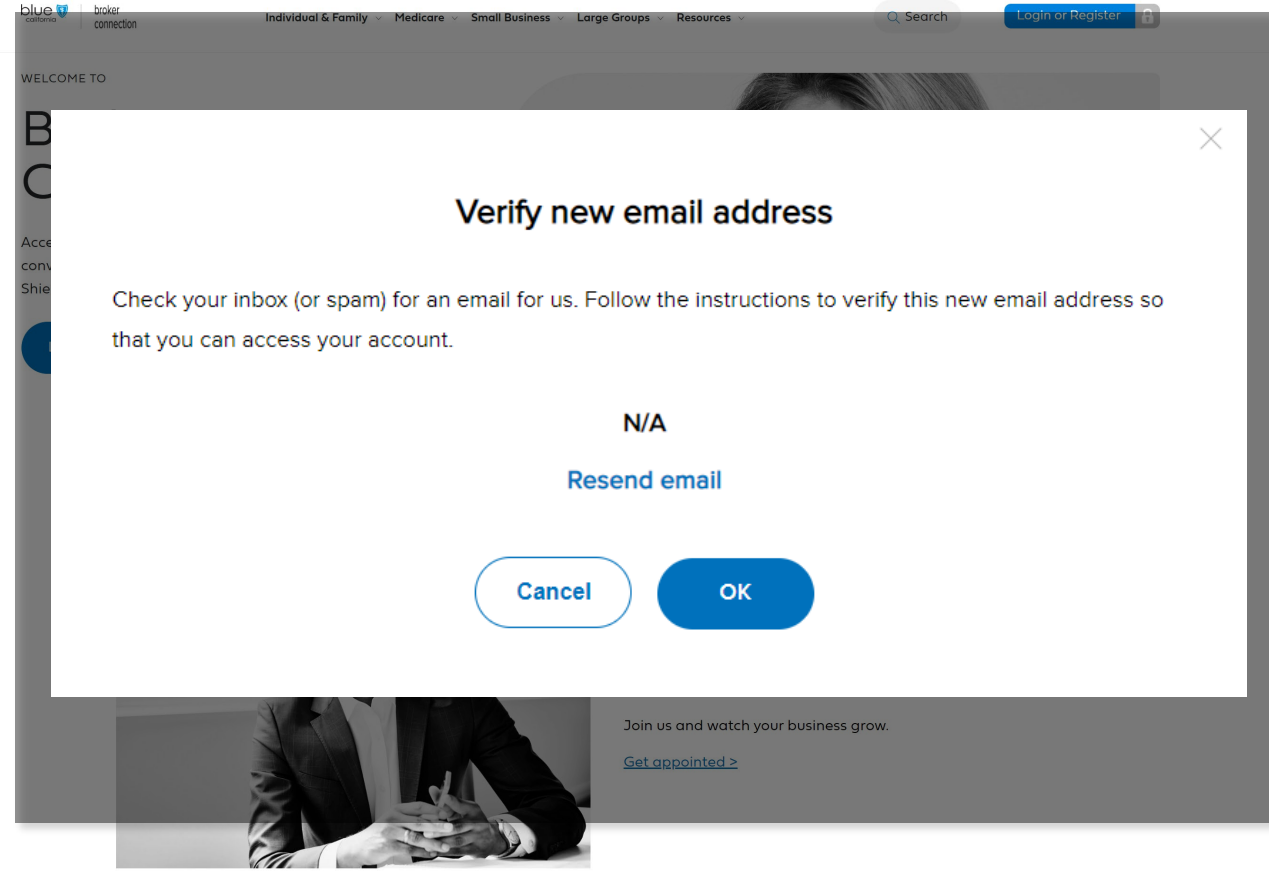
- 19. On the left side of the screen; **enter your username and password.**
- 20. **Click the log in button.**

Important

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

Register for Broker Connection

AA Increase Text Size

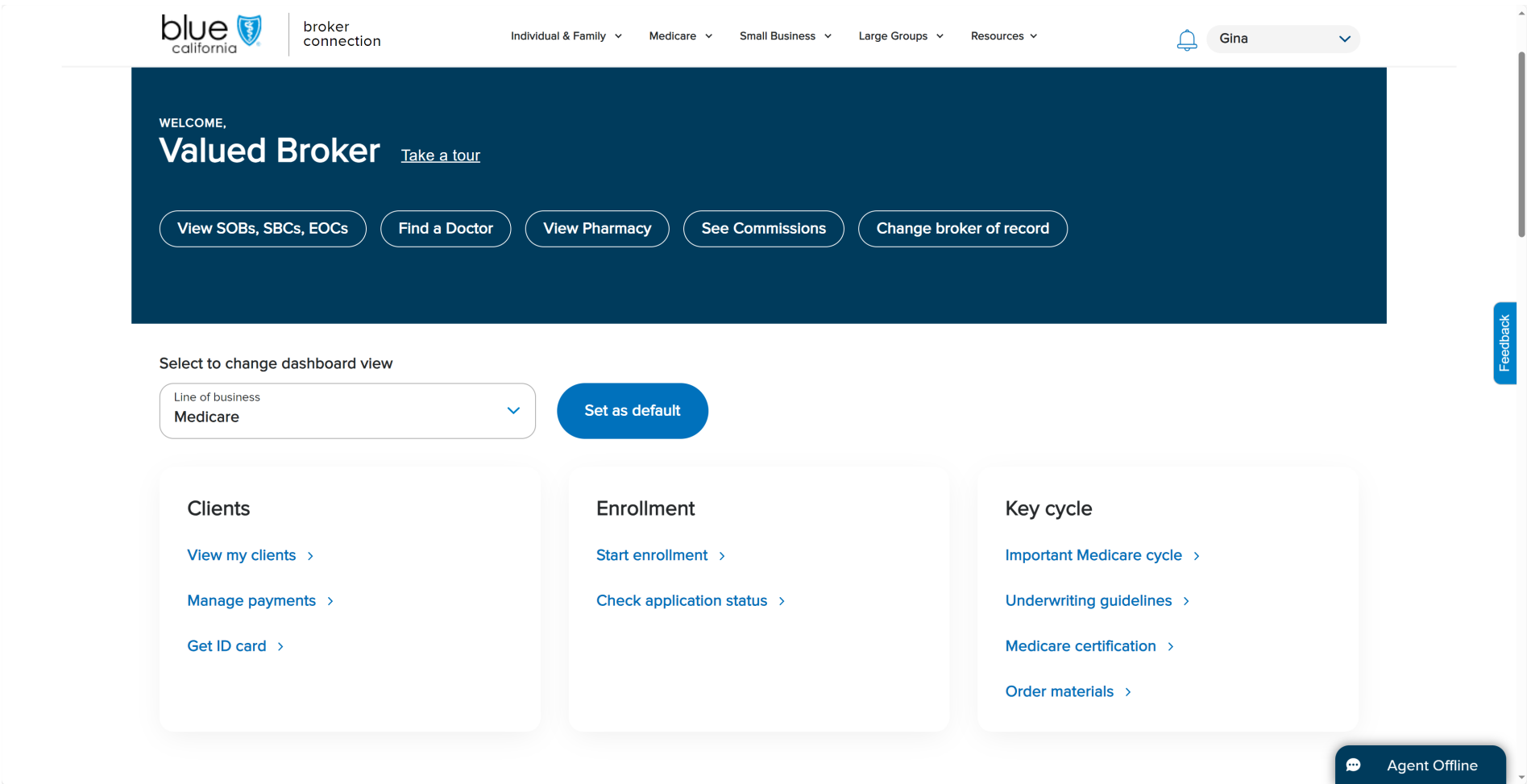


Registration Steps

If you log in for the first time and have not verified your email address, you will receive a reminder.

Get the most from your Broker Connection account

Broker Connection



The screenshot shows the Broker Connection dashboard home page. At the top left is the Blue Shield of California logo and 'broker connection' text. A navigation menu includes 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. A user profile for 'Gina' is visible in the top right. The main content area features a dark blue banner with 'WELCOME, Valued Broker' and a 'Take a tour' link. Below this are five buttons: 'View SOBs, SBCs, EOCs', 'Find a Doctor', 'View Pharmacy', 'See Commissions', and 'Change broker of record'. A section titled 'Select to change dashboard view' has a dropdown menu set to 'Medicare' and a 'Set as default' button. Three main dashboard cards are shown: 'Clients' (with links for 'View my clients', 'Manage payments', and 'Get ID card'), 'Enrollment' (with links for 'Start enrollment' and 'Check application status'), and 'Key cycle' (with links for 'Important Medicare cycle', 'Underwriting guidelines', 'Medicare certification', and 'Order materials'). A 'Feedback' button is on the right side of the dashboard. At the bottom right, there is an 'Agent Offline' status indicator.

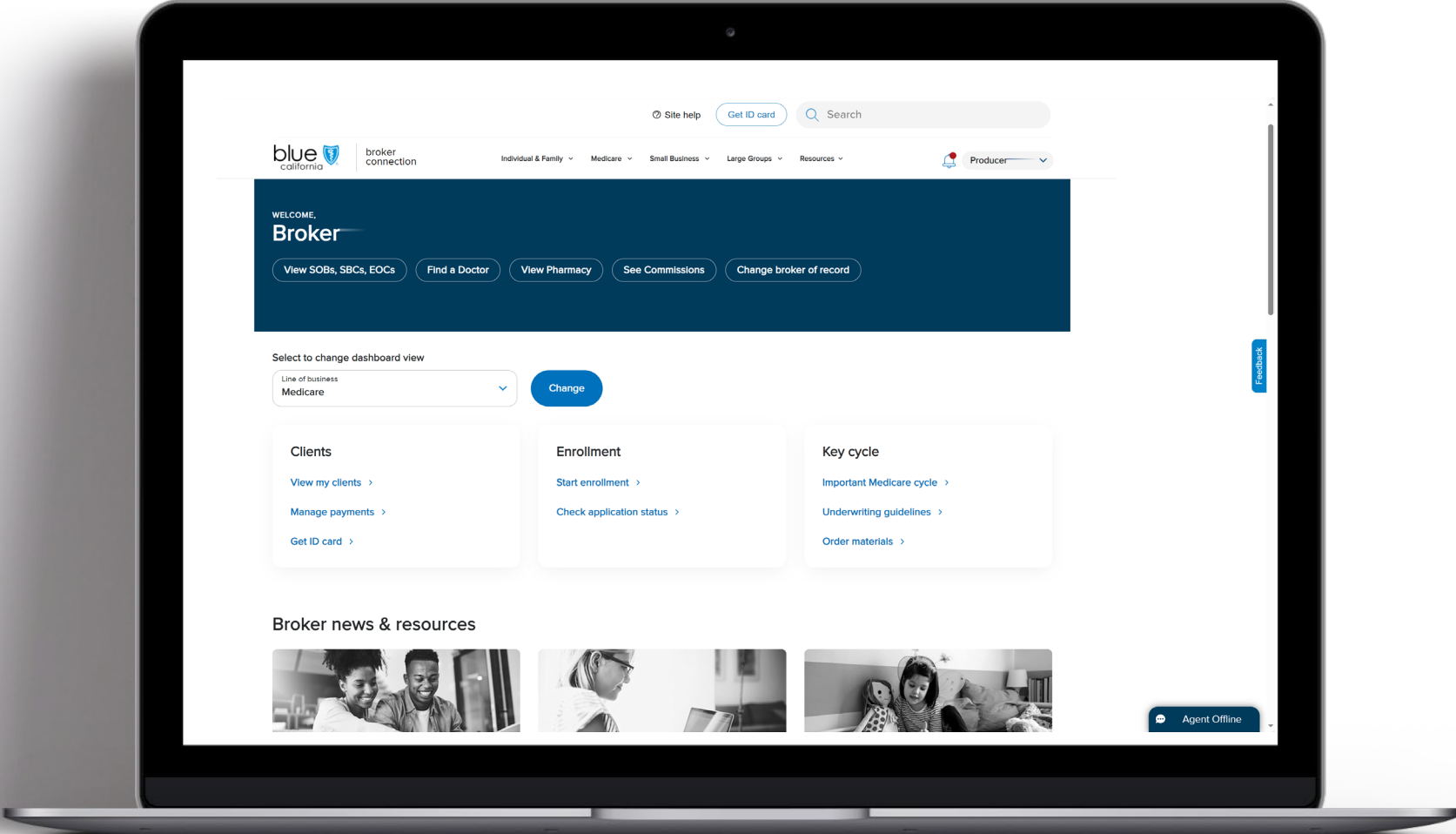
Authenticated Home Page

You are now logged into Broker Connection.

From the home page you can use the dashboard to access various broker tools to help manage your book of business including:

- **Clients**
 - View my clients
 - Manage payments
 - Get ID cards
- **Enrollment**
 - Start enrollment
 - Check application status
- **Key Cycle**
 - Important Medicare cycle
 - Underwriting guidelines
 - Order materials

2- Step Verification



2- Step Verification

Overview

Blue Shield of California is proactively enhancing data security by implementing 2-Step Verification for all external portals. This is additional layer of protection requires users to verify their identity through a personalized code, reducing unauthorized access and potential data breaches. The move aligns with Security Compliance requirements, offering more secure online interactions and better safeguarding sensitive information against compromised passwords.

Important

2-Step Verification is unique to the individual. Each person within your organization, agency, or company who needs access must register for an account on Broker or Employer Connection.

Key Points

1. You cannot bypass the 2-Step Verification.
2. You'll need real-time access to the email inbox of the email address on file in your online profile.
3. You must enter a new 6-digitcode each time you login or after an extended period (4 hours) of inactivity.
4. The 2-Step Verification code is sent to the registered email in your online Broker Portal profile.
5. If you enter an incorrect code three times, your account will be automatically locked for 10 minutes. You can attempt your login after the 10-minute wait period.

Any issues with the 2-Step Verification, please contact Blue Shield Producer Services.

Phone Number:
1-800-559-5905


Completing a 2-Step Verification

> Welcome to Broker Connection

Welcome to Broker Connection

Log in

1

Show 

Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account


A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process](#).

Register

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

 This page cannot be bookmarked. See instructions for how to bookmark this page [here](#).

Steps

1. Enter your **Username and Password** information and **click the Login button**.

Completing a 2-Step Verification

Steps



Log in with 2-step verification

We've sent a verification code to (mr****@blueshieldca.com).

Enter that code here.

2

Confirm

Time remaining 09:50

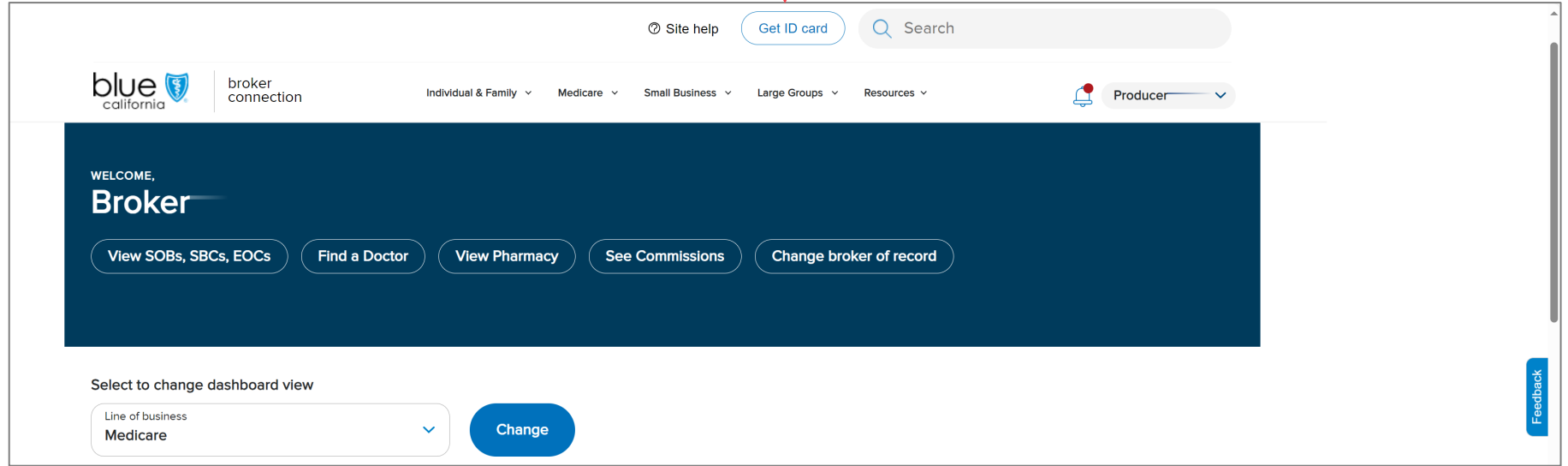
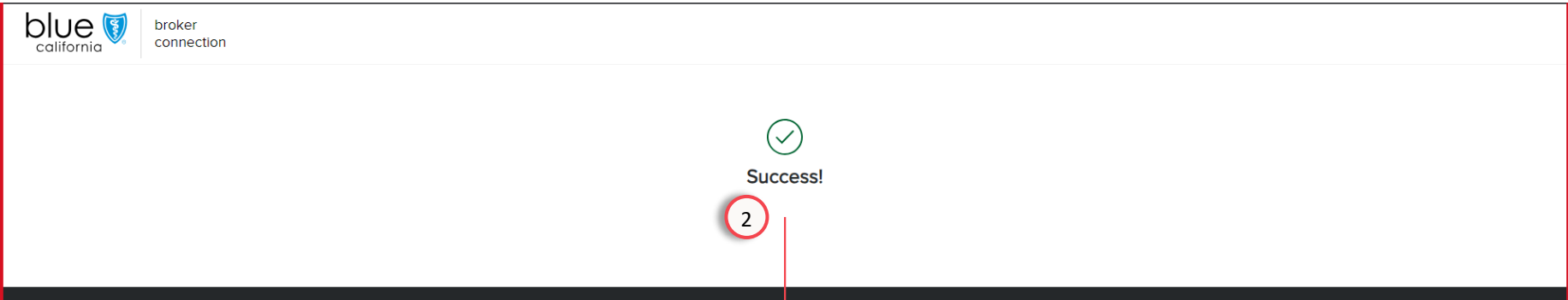
Didn't get the code?

- There may be a delay in processing. Wait a few minutes and check again.
- Check your spam folder
- [Resend code](#)

Need help? Contact Producer Services at (800) 559-5905

- A one-time passcode is sent to your email address.
- You have 10 minutes to enter that code before it expires.
- If you need to have the code sent again, click the **Resend Code link** at the bottom of the page.
2. Enter the code and click **Confirm**.

Completing a 2-Step Verification



Steps

2. After success message is displayed, you are automatically taken to the Broker Connection home page.



Primary Agents & Agency Owners

Account Management Tool

[View Section](#)

Introducing Broker Connection Account Management Tool

Primary agents and agency owners will have administrative control for their account access to Broker Connection using the new “Account Management Tool” features.

Primary agents already appointed with Blue Shield of California will be able to create and manage new user accounts on broker connection with access to all its tools and resources.

Role-based Permissions

User account functionality is determined by role-based permissions and easily set or changed anytime by your designated primary agent.



Register and Log In

Register

1. Click the **Log in or Register** button at the top right of the page.



broker connection

[Individual & Family](#) [Medicare](#) [Small Business](#) [Large Groups](#) [Resources](#)

Search

Login or Register

1

WELCOME TO

Broker Connection

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

Log in to your account



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two-step appointment process on our resources page](#).

Join us and watch your business grow.

[Get appointed >](#)

Register and Log In

> Welcome to Broker Connection

Welcome to Broker Connection

Log in

2

Username

Password [Show !\[\]\(172bfc9d545d1d5db061857c515d842a_img.jpg\)](#)

Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Create an account


A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

Register

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

 This page cannot be bookmarked. See instructions for how to bookmark this page [here.](#)

Registration Steps

2. Enter your **Log In** information and **click the Continue button.**

Note:

This section provides steps for the Primary Agent to perform a secondary registration process for endorsed agents for their agency.

Broker Connection

The screenshot shows the 'Resources' page with a navigation menu at the top. The 'Resources' tab is circled in red with the number 3. Below the navigation menu, there are three columns of links. The 'Manage your accounts' link in the first column is highlighted with a red box and the number 4. Other links include 'Broker Compensation', 'Advertising & Marketing Resources', 'Order Materials', 'Update Your Profile', 'Direct Deposit', 'Rewards & Commissions', 'Mandates Information', 'Personalize Your Website', 'Email Producer Services', 'Broker Communications', and 'Broker of Record Change'. On the right side, there is a notification bell icon with '789' and a list of quick links for brokers.

Resources Menu

Under the resources tab you'll see a new option for manage your accounts.

3. Click the **Resources Tab** to view the menu.
4. Select **Manage your accounts** from the menu options.

Note:

You must sign-in to your Primary Agent or Administrator account to access this menu option.

Other role-based profiles (i.e., sales agent, sub agent) will not display this option in the menu.

Select to change dashboard view

Line of business
Medicare ▼ Change

Clients

- [View my clients >](#)
- [Manage payments >](#)
- [Get ID card >](#)

Enrollment

- [Start enrollment >](#)
- [Check application status >](#)

Key cycle

- [Important Medicare cycle >](#)
- [Underwriting guidelines >](#)
- [Order materials >](#)

Account Management




MANAGE BROKER CONNECTION ACCOUNTS

Create an account

[Need help?](#) [Need to add a delegate?](#)

Pending accounts

5

Name	Role	Email	LOB	Expires	Action
As Sa	Subagent	as@email.com	Small Groups	2024-06-19	Resend invite 
Subagent Test	Subagent	coverageoptions@blueshieldca.com	IFP	2024-06-17	Resend invite 
John Jacob	Primary agent	testabcdxyz@blueshieldca.com	IFP	2024-06-10	Resend invite 

< 1 2 3 4 >

Showing 1 – 5 of 17 pending accounts

Active and deactivated accounts

6

 Filter

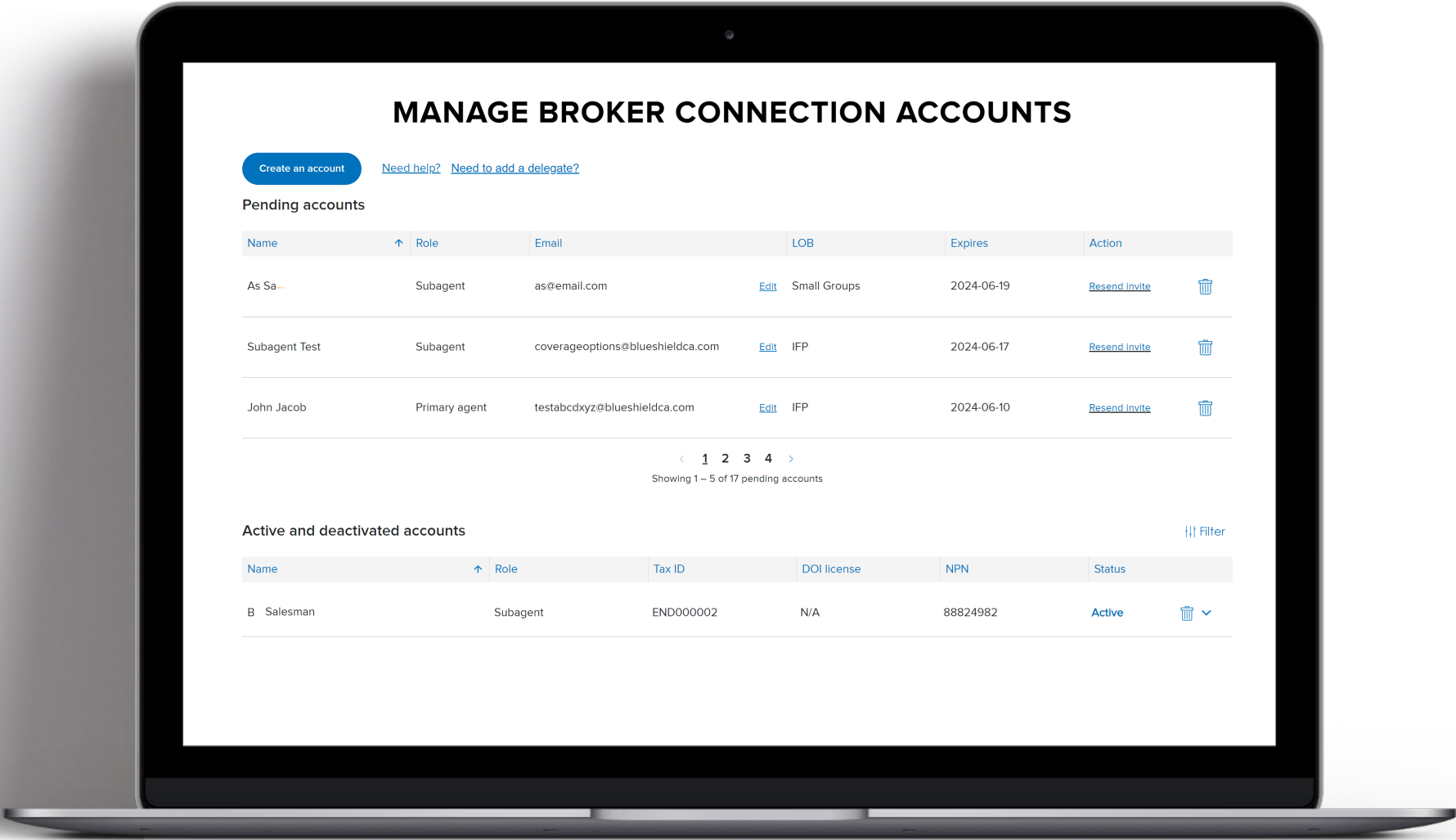
Name	Role	Tax ID	DOI license	NPN	Status
B Salesman	Subagent	END000002	N/A	88824982	Active  

Registration Steps

The Broker Connection Accounts page displays all the accounts for your agency.

- At the top of the page, is the Pending Accounts section, which are accounts that were newly invited to register.
- And at the bottom of the page, there the active and deactivated accounts.

Managing Accounts



Managing Accounts: Pending Accounts

MANAGE BROKER CONNECTION ACCOUNTS

Pending Accounts

Pending Accounts are technically not active.

Therefore, the only field that's editable is the email address field. You can update the email and resend the invite.

You also have the option to delete the pending account by click on the trash icon.

Note:




If the user did not respond within the first seven days, you can resend the invite.

Resending the invite will provide another seven days before it expires again.

Create an account

[Need help?](#) [Need to add a delegate?](#)

Pending accounts

Name	Role	Email	LOB	Expires	Action
As Sa	Subagent	as@email.com	Small Groups	2024-06-19	Resend invite 
Subagent Test	Subagent	coverageoptions@blueshieldca.com	IFP	2024-06-17	Resend invite 
John Jacob	Primary agent	testabcdxyz@blueshieldca.com	IFP	2024-06-10	Resend invite 


< 1 2 3 4 >
Showing 1 – 5 of 17 pending accounts

Active and deactivated accounts

 Filter

Name	Role	Tax ID	DOI license	NPN	Status
B Salesman	Subagent	END000002	N/A	88824982	Active 

Managing Accounts: Active and Deactivated Accounts

John Jacob	Primary agent	testabcdxyz@blueshieldca.com	Edit IFP	2024-06-10	Resend invite	
------------	---------------	------------------------------	--------------------------	------------	-------------------------------	---

< 1 2 3 4 >
Showing 1 – 5 of 17 pending accounts

Active & Deactivated Accounts

Once the user accepts the invite and creates the account, it will move to Active accounts section.


You can expand each user's information by clicking on the expand arrow on the right side of their information.

The expanded information now includes the ability to:

- Change the user's role, and if you selected sub-agent, you could turn on or off access to the agency's client list, and commissions.
- Add and remove, the lines of business the person sells.
- Account controls to "dis-associate" the user from the agency.

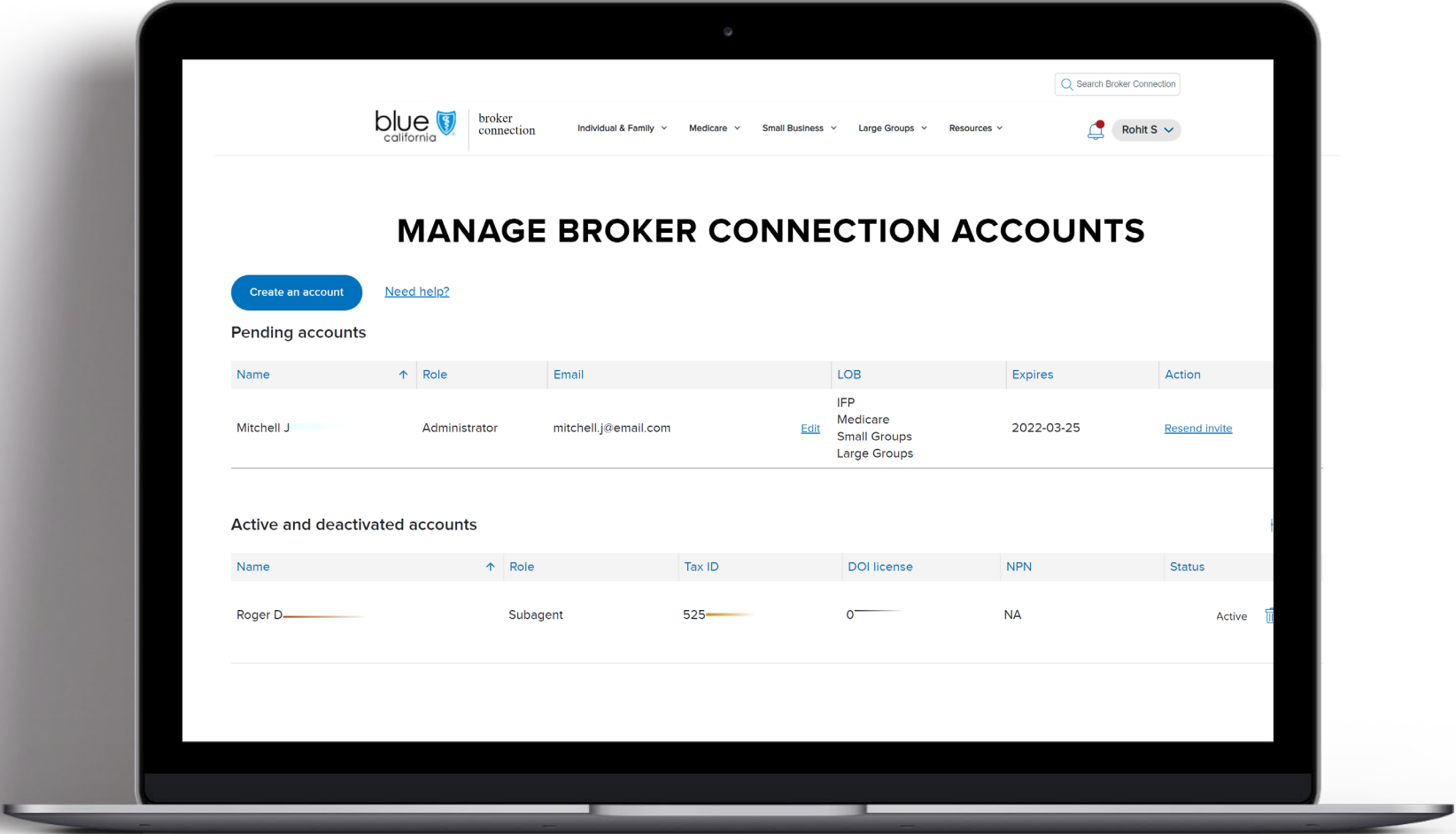
Active and deactivated accounts

 Filter

Name	Role	Tax ID	DOI license	NPN	Status
B Salesman	Subagent	END000002	N/A	88824982	Active 

Contact information		User information			
Username Batman01	Change role Subagent	Add/remove lines of business		Account status	
Email Batman@gmail.com	<input type="checkbox"/> Access agency client list	<input checked="" type="checkbox"/> IFP	<input checked="" type="checkbox"/> Medicare	<input checked="" type="radio"/> Active	
Phone 4878757858	<input type="checkbox"/> View agency commissions	<input type="checkbox"/> Small Groups	<input type="checkbox"/> Large Groups	<input type="radio"/> Deactivated	
				<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

Creating an Account





Create an Account

Create an Account

MANAGE BROKER CONNECTION ACCOUNTS

1

Create an account

[Need help?](#)

Pending accounts

Name	Role	Email	LOB	Expires	Action
Jasprit B	Primary agent	93@email.com	IFP Medicare Small Groups Large Groups	2022-03-22	Resend invite

Active and deactivated accounts

[Filter](#)

No accounts.

1. Click the **Create an Account** button to invite the user to register for a Broker Connection account associated with your agency.

Create an Account

Create an Account

blue california | broker connection | Individual & Family | Medicare | Small Business | Large Groups | Resources | Search Broker Connection | Rohit S

Home > Create an account

1 Assign a role | 2 Lines of business | 3 Personal details | 4 Confirmation

Assign a role

You can change the role later after the account is created.

- Support Staff
- Sales agent
- Subagent
- Administrator
- Primary agent

Select optional subagent permissions

- Access agency client list
- View agency commissions

4 Continue

The primary agent begins a four-step process, and at the top of the page is a progress bar.

- For the first step, **assign a role**.
- If Subagent is selected, you can **select optional permissions** to:
 - Access agency client list.
 - View agency commissions.
- Scroll to the bottom of the page and click **Continue** to move to the next step.

Note:

Subagent is the only role that has optional permissions.

Create an Account

What can each role do?

	Support staff	Sales agent	Subagent	Administrator	Primary agent*
Order sales materials	✓	✓	✓	✓	✓
Use enrollment tools	✓	✓	✓	✓	✓
Access their client list		✓	✓	✓	✓
View their commissions		✓	✓	✓	✓
View application status		✓	✓	✓	✓
Access agency client list			✓	✓	✓
View agency commissions			✓	✓	✓
Create and manage user accounts				✓	✓
Update agency profile					✓
Change direct deposit details					✓

✓ Optional

*Primary agents can create up to 4 other primary agent accounts.

Roles Defined

Each of the different roles are clearly defined.

There can be up to four primary agents that are assigned per agent.

There are no restrictions in terms of how many administrators, subagents, sales agents, or a support staff that can be created.

For the Medicare lines of business, endorsed agents will be fulfilled with the sales agent role.

Subagents technically are applicable for all lines of business.

However, endorsed agents are not appointed with blue shield, and we are requiring users who are set up as a subagent to be appointed with blue shield directly.



Create an Account

Create an Account

blue california broker connection

Individual & Family Medicare Small Business Large Groups Resources

Search Broker Connection

Rohit S

Home > Create an account

Progress: 1. Assign a role (checked), 2. Lines of business (active), 3. Personal details, 4. Confirmation

Choose lines of business

This is just for our information. It won't affect user access.

5 Individual & family plans (checked)

Medicare (checked)

Small business

Large group

6 Continue

- Select the lines of business that the user will sell.
- Click the **Continue** button to move to the next step.

Note:

At least one option must be selected, and you can select as many as you need.



Create an Account

Create an Account

For personal information, we enter only the essential data that's required to trigger the invitation .

7. Enter the **personal details to create the account** and send the invite and click **Continue**.

blue california | broker connection | Individual & Family | Medicare | Small Business | Large Groups | Resources | Search Broker Connection | Rohit S

Home > Create an account

Progress: Assign a role (1) | Lines of business (2) | **Personal details (3)** | Confirmation (4)

Enter personal details

First name*
Bob

Last name*
Smith

Email address*
bSmtih@email.com

7 Continue



Create an Account



Account created



Account info

Name: Bob Smith Role: Salesagent
Email: _____

We emailed **Bob Smith** a link to activate their account. They need the last 4 digits of the agency's tax ID for activation.

The link expires in 7 days.

[Return to dashboard](#)

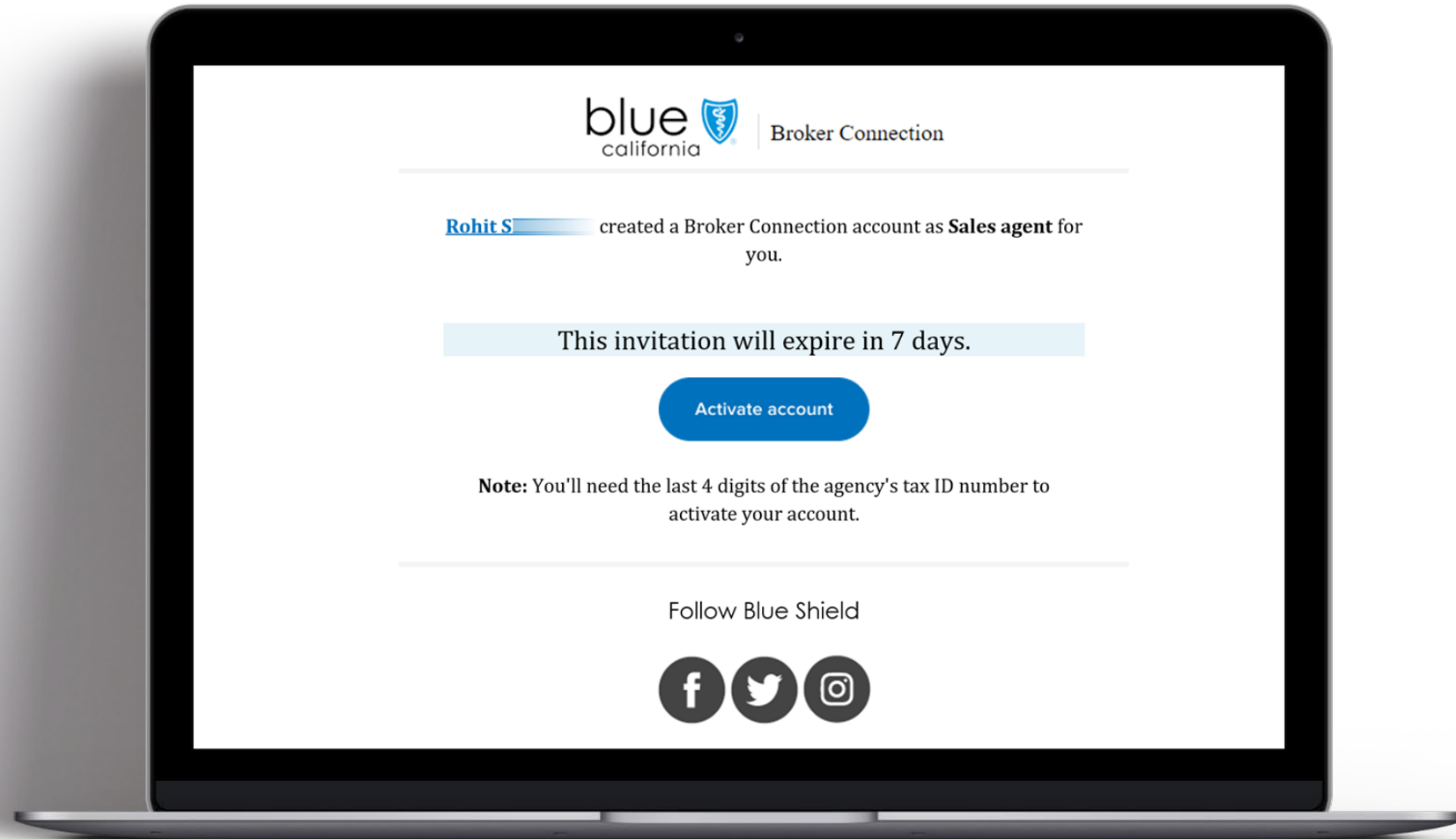


[Create an Account](#)

You will get a confirmation stating that an account for a specific individual and specific role was created.

8. Click the **Return to Dashboard** to exit this screen.

Accepting an Invitation & Merging Accounts



Broker Connection registration experience for agents associated with an agency

Agents that are currently not appointed with Blue Shield of California, will be able to create an account on Broker Connection through an invite registration process from their agency. Additionally, agents that have Broker Connection accounts or are appointed with Blue Shield can accept an invite to register an account that is associated with an agency.

These types of user accounts are assigned role-based permissions and functionality, as determined by the primary agent or agency and will provide access to tools and resources to help agents sell and help manage their book of business.

Role-based Permissions

User account functionality is determined by role-based permissions and easily set or changed anytime by your designated primary agent for the agency.

Accepting an invitation and merging accounts



Rohit S created a Broker Connection account as **Sales agent** for you.

This invitation will expire in 7 days.

[Activate account](#) 1

Note: You'll need the last 4 digits of the agency's tax ID number to activate your account.



[Invite](#)

In the prior section, a new user was invited to create a Broker Connection.

The new user received their invite email.

1. To accept the invite, **click the Activate Account** button in the invite email.

The invite expires in 7 days.

If the invite has expired, please contact the sender to create a new invite.

Note:

You will need the last 4 digits of the agency's tax ID number to activate your account.



Register for Broker Connection



broker connection

Individual & Family Medicare Small Business Large Groups Resources

Search

Login or Register

2

WELCOME TO

Broker Connection

Access commissions, client lists, and more in one convenient place when you're a broker with Blue Shield of California

Log in to your account



Become a Blue Shield broker

Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business.

To become a Blue Shield Broker, you must first create an account and have your account appointed. Learn more about our [two-step appointment process on our resources page](#).

Join us and watch your business grow.

[Get appointed >](#)

Registration Steps

After clicking on the Activate Account button in the email, you will be taken to the Broker Connection home page.

- 2. Click the **Log In or Register** button.



Register for Broker Connection

Home > Welcome to Broker Connection

Welcome to Broker Connection

Log in

Username

Password [Show](#)

Remember my username

[Forgot your password?](#)

[Forgot your username?](#)

Create an account

A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

3

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

ⓘ This page cannot be bookmarked. See instructions for how to bookmark this page [here](#).

Feedback

Registration Steps

If you have an account already, do not log in.

You must continue with registration steps to merge and link your account with the agency.

3. Click the **Register** button.

Register for Broker Connection

Registration Steps

We see again the six-step process in the non-affiliated agent registration.

- 4. Enter **last 4 digits of agency TIN** to validate and get started with secondary registration.

Search Broker Connection

blue california | broker connection | Individual & Family | Medicare | Small Business | Large Groups | Resources

ount

Agency information

Enter the last 4 digits of the tax ID (TIN) for the agency.

Last 4 digits of the agency TIN 4

Register for Broker Connection

1 ✓ 2 ✓ 3 4 5 6

Lines of business Tax and license Contact Account Confirmation Terms & conditions

Do you already have a Broker Connection account?

If so, when you log in, we'll merge your current client list with the new information you just entered.

5 Yes, I'll log in

No, I need to create an account

Continue

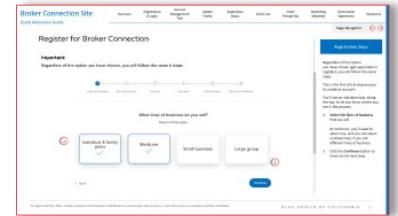
< Back Continue

Registration Steps

After entering the Tax Information Number, you will receive a pop-up asking if you have an account.

- 5. Select a response to the account question (default pop-up).

If you select no, it will follow the same registration process as we demonstrated in the first part of the guide:





Register for Broker Connection

Search Broker Connection



broker connection

Individual & Family

Medicare

Small Business

Large Groups

Resources

[Create an account](#)



You already have a Broker Connection account

Log in with your existing username and password. We'll merge your current client list with the new information you just entered.

Continue

6

Registration Steps

If you select **Yes**, you have a **Broker Connection** account:

- 6. Confirm your **account information**, the system recognizes existing account and click **Continue**.

Register for Broker Connection

Log in to merge your accounts

7

 [Show](#)  Remember my username

Login

[Forgot your password?](#)

[Forgot your username?](#)

Registration Steps

- 7. Log in using your **current ID and password** to merge your accounts.

Register for Broker Connection



Your Broker Connection accounts have been successfully merged.

To make changes to your new Broker Connection account, go to your Profile page.

[Log in](#) 

Follow Blue Shield



Registration Steps

After you log in, you will receive an email confirming that your account has been merged.

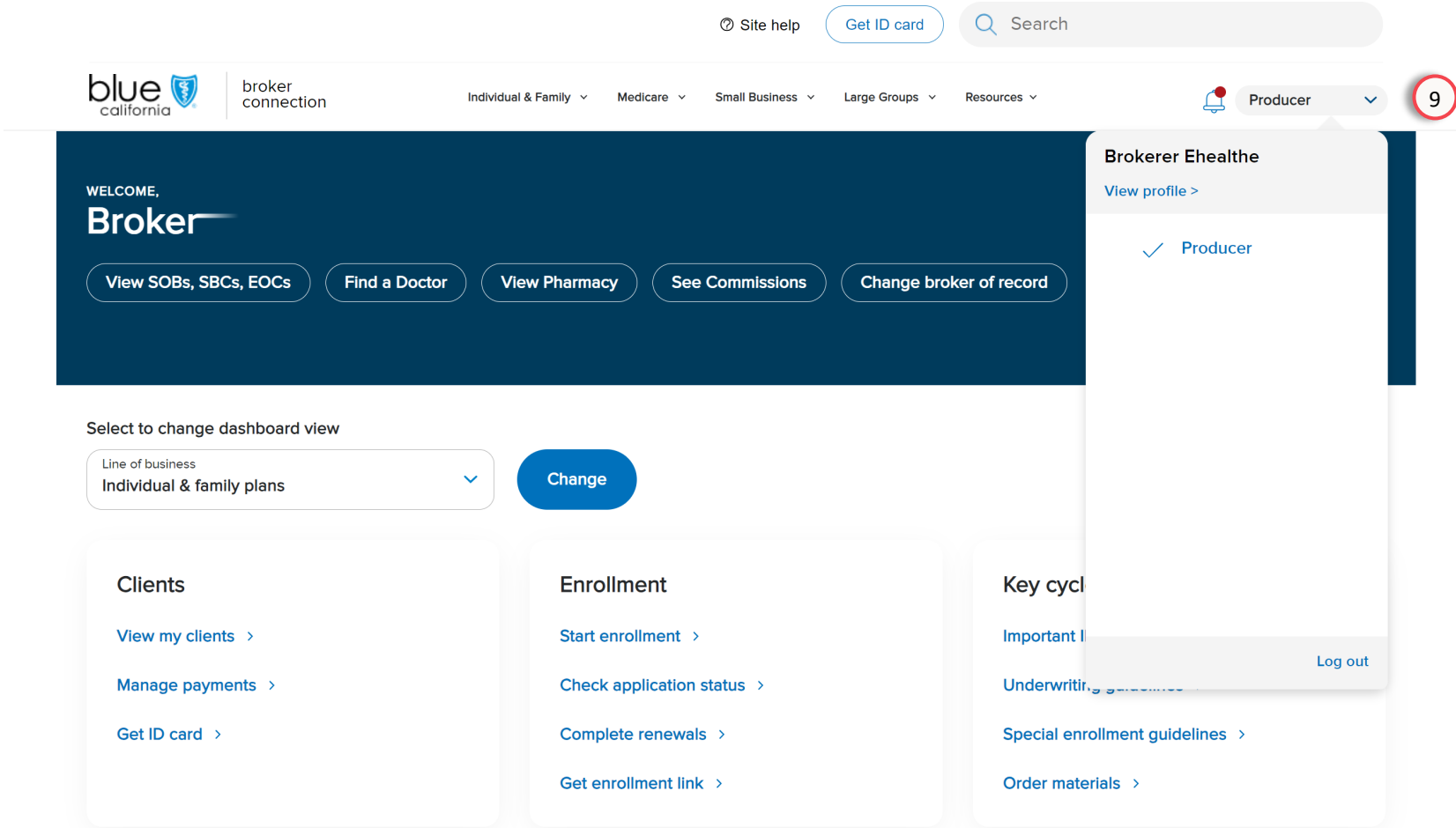
- 8. Click the **Log in button in the email** to return to Broker Connection.

Register for Broker Connection

Registration Steps

On your next log in, you will see an option to select the company.

9. When you **select the company**, you will have access to the role assigned to you.



The screenshot shows the Broker Connection site dashboard. At the top, there is a navigation bar with links for Site help, Get ID card, and Search. Below this is a header with the Blue Shield of California logo and the 'broker connection' text. The main navigation menu includes 'Individual & Family', 'Medicare', 'Small Business', 'Large Groups', and 'Resources'. A user profile dropdown is open, showing the role 'Producer' with a checkmark. A red circle with the number '9' highlights the dropdown menu. Below the header, there is a 'WELCOME, Broker' section with buttons for 'View SOBs, SBCs, EOCs', 'Find a Doctor', 'View Pharmacy', 'See Commissions', and 'Change broker of record'. Below this is a 'Select to change dashboard view' section with a dropdown menu set to 'Individual & family plans' and a 'Change' button. The dashboard is divided into three columns: 'Clients' (with links for View my clients, Manage payments, and Get ID card), 'Enrollment' (with links for Start enrollment, Check application status, Complete renewals, and Get enrollment link), and 'Key cycle' (with links for Important information, Underwriting guidelines, Special enrollment guidelines, and Order materials). A 'Log out' button is visible in the bottom right corner of the dropdown menu.



Updating Your Broker Profile


Broker Connection Site

[View Section](#)

Updating Your Broker Profile

Log In


1. Enter your credentials and click the **Log In** button.

 > Welcome to Broker Connection

Welcome to Broker Connection

Log in

1

Show 

Remember my username

[Forgot your password?](#)

[Forgot your username?](#)


Create an account

A Broker Connection account allows you to get updates on your client applications, check for policy cancellations, and view your latest commissions. You'll need to get your [Broker Connection account appointed through our two step process.](#)

To get appointed you need:

- The tax ID number
- Email address
- Errors & Omissions Insurance Certificate
- Direct deposit information

[Who can create an account?](#)

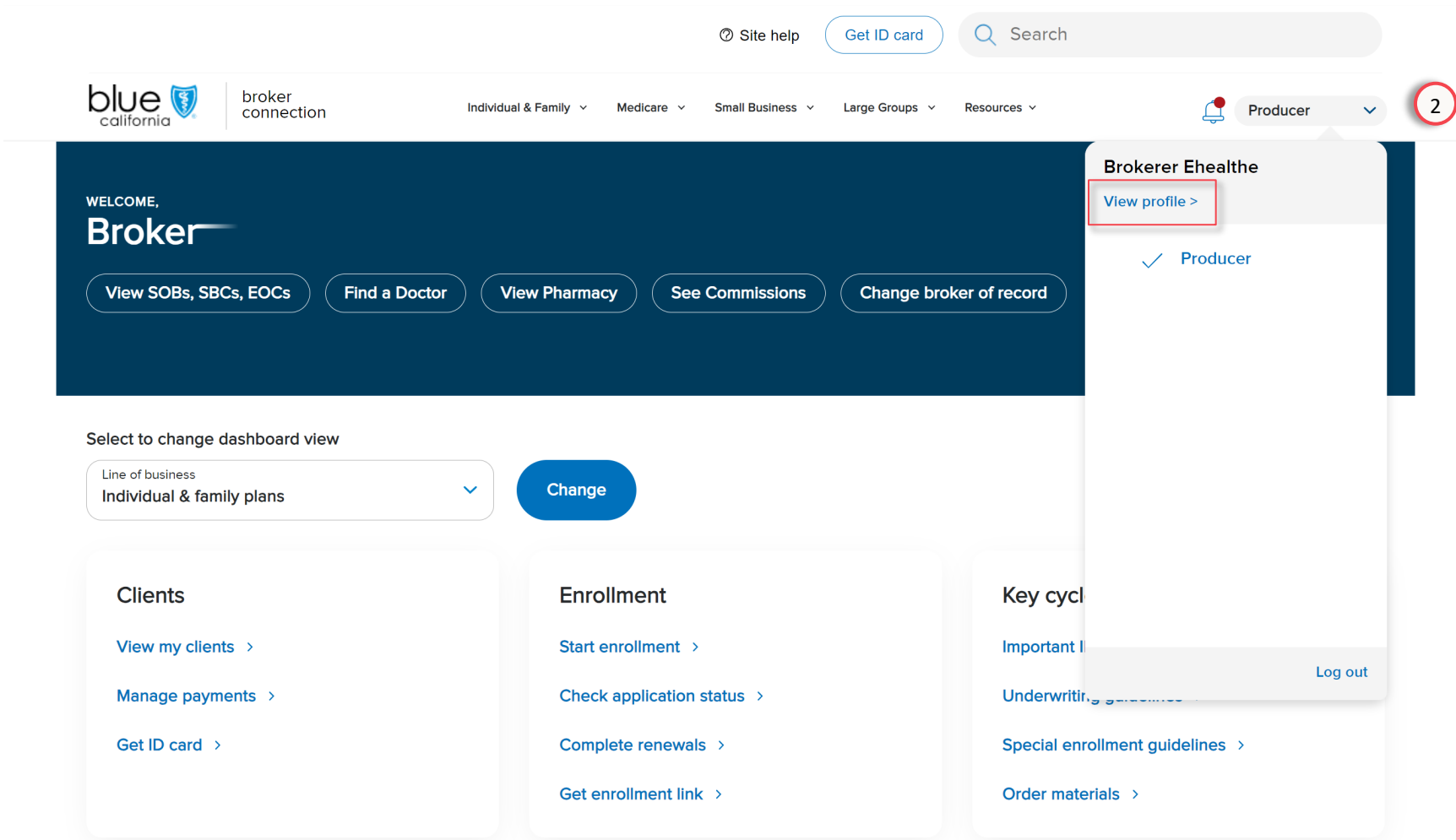
 This page cannot be bookmarked. See instructions for how to bookmark this page [here.](#)

Feedback

For Agent Use Only. Plans contain exclusions and limitations. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

BLUE SHIELD OF CALIFORNIA 58

Updating Your Broker Profile



The screenshot shows the Broker Connection dashboard. At the top right, there is a profile icon with a notification bell and the name 'Producer'. A red circle with the number '2' highlights this icon. A dropdown menu is open, showing the 'View profile >' option highlighted with a red box. Below the profile icon, there is a 'Change broker of record' button. The dashboard also features a 'WELCOME, Broker' banner with buttons for 'View SOB, SBCs, EOCs', 'Find a Doctor', 'View Pharmacy', 'See Commissions', and 'Change broker of record'. Below the banner, there is a 'Select to change dashboard view' section with a dropdown menu set to 'Individual & family plans' and a 'Change' button. The dashboard is divided into three main sections: 'Clients', 'Enrollment', and 'Key cycle'. The 'Clients' section includes 'View my clients >', 'Manage payments >', and 'Get ID card >'. The 'Enrollment' section includes 'Start enrollment >', 'Check application status >', 'Complete renewals >', and 'Get enrollment link >'. The 'Key cycle' section includes 'Important I...', 'Underwriting...', 'Special enrollment guidelines >', and 'Order materials >'. A 'Log out' button is visible at the bottom right of the dropdown menu.

Broker Connection Home Page

2. Click the **profile icon** (your name) at the top right of the page to access your profile information.

Updating Your Broker Profile

MY PROFILE

User account [Edit](#)

First name Valid	Username bsmith
Last name Producer	Password ••••••
Email producerconnection@blueshieldca.com	

3

Updating your Profile

3. To update your profile information, click the **Edit** icon in the section you want to update.

Personal broker credentials

Updating Your Broker Profile

MY PROFILE

User account
Edit

First name
Valid

Last name
Producer

Email
producerconnection@blueshieldca.com


Username
Must have:


- 8-20 characters
- Numbers and letters only
- No spaces
- Unique Identification

Username
bsmith

Password
Must have:

- 8-20 characters
- At least 1 lowercase letter
- At least 1 uppercase letter
- A number or symbol (?#!*)
- No spaces

New password [Show](#) 

Confirm new password [Show](#) 

Cancel
Save Changes
4

Updating your Profile

4. When you are done editing your profile, click the **Save Changes** button.

Remember

It's important to keep your information up-to-date.

Application Status

Check updates on client applications

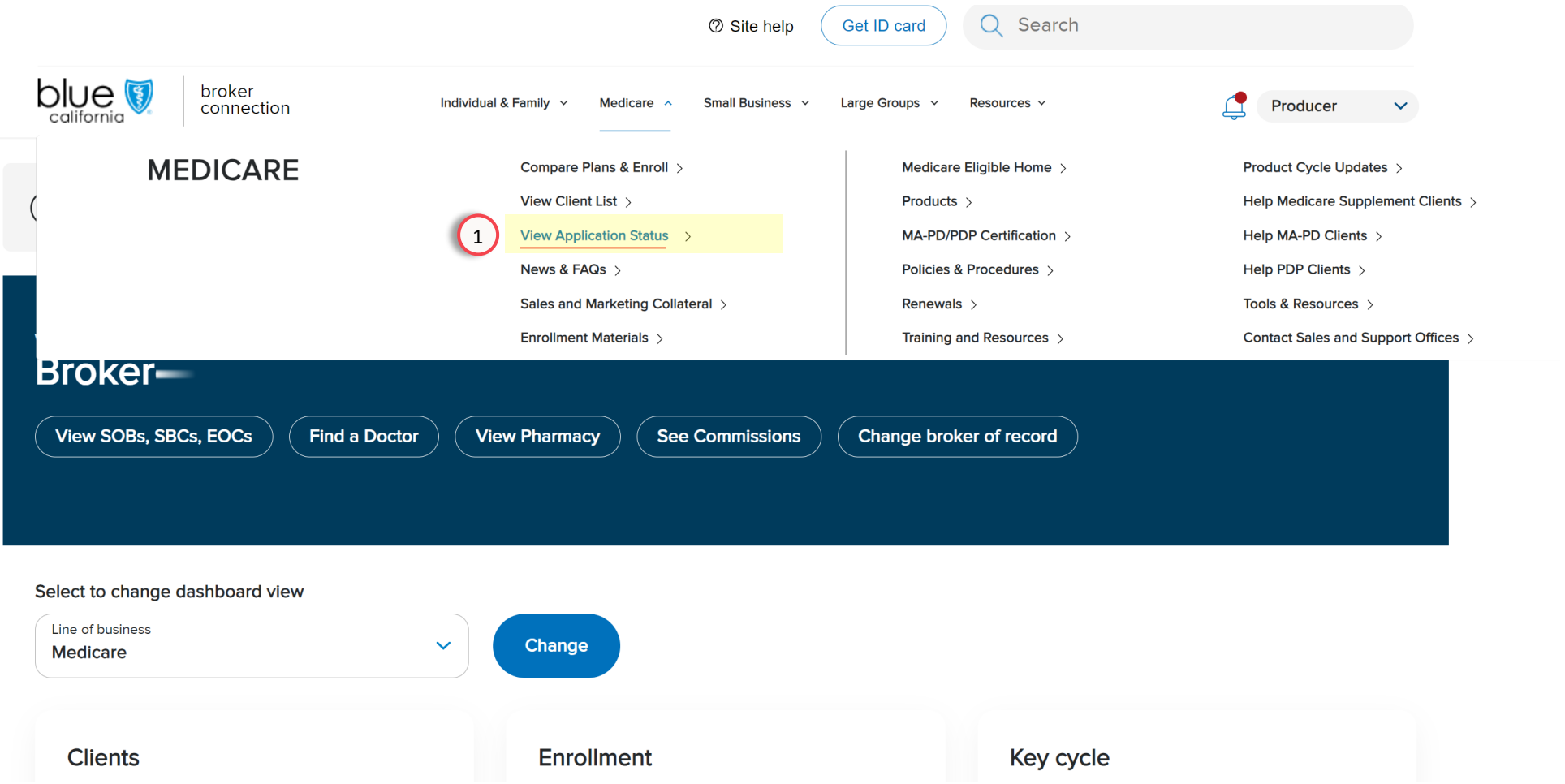
[View Section](#)

Application Status

[View Application Status](#)

Click on the **Medicare** tab on the navigation bar to open the menu.

1. Select **View Application Status** from the menu.



The screenshot shows the Medicare navigation menu. The 'View Application Status' option is highlighted in yellow and circled with a red '1'. The menu includes options like 'Compare Plans & Enroll', 'View Client List', 'News & FAQs', 'Sales and Marketing Collateral', 'Enrollment Materials', 'Medicare Eligible Home', 'Products', 'MA-PD/PDP Certification', 'Policies & Procedures', 'Renewals', 'Training and Resources', 'Product Cycle Updates', 'Help Medicare Supplement Clients', 'Help MA-PD Clients', 'Help PDP Clients', 'Tools & Resources', and 'Contact Sales and Support Offices'. Below the menu is a dark blue bar with buttons for 'View SOB, SBCs, EOCs', 'Find a Doctor', 'View Pharmacy', 'See Commissions', and 'Change broker of record'. At the bottom, there is a 'Select to change dashboard view' section with a dropdown menu set to 'Medicare' and a 'Change' button, followed by three tabs: 'Clients', 'Enrollment', and 'Key cycle'.

Application Status

Medicare plan application status

- IFP Off Exchange
- IFP On Exchange
- Medicare

Filter and Sort X

2

Name	Application status	Plan name	Confirmation number
Steve	Approved	Medicare Supplement Plan A Apr18	SCOP21012
Venus	Received	Medicare Supplement Plan A Apr18	SCOP21012
RASHID	Action Required - On Hold Due to Missing Info	Medicare Supplement Plan A Apr18	DRX009072
BRIAN	Processing	Medicare Supplement Plan A Apr18	DRX009072

View Application Status

The page displays all available applications and the following information for each:

- Name
- Application status
- Plan name
- Confirmation number

2. Click the **Filter and Sort** link to expand or close the search options.

Application Status

Medicare plan application status

[Data Update Details](#)

IFP Off Exchange IFP On Exchange **Medicare**

Hide Filter X

Enter the required information to check your client's application status. To perform a search enter criteria into at least ONE of these fields: First Name, Last Name, Medicare ID, Confirmation Number or National Producer Number.

Confirmation Number/Application ID

Application Submitted

Within last 6 months

First Name

Last Name

Medicare ID Number

National Producer Number

Sort By

Latest application

3

Search

Clear form

Register

To perform a search, enter at **least one** criteria in its corresponding field.

Use the filters (highlighted in yellow) to narrow your search by application submitted:

- Within the last 6 months
- Within the last 24 hours
- Within the last 48 hours
- Within the last week
- Within the last month
- Other

You can sort the results by:

- Latest application
- Last Name

3. Click the **Search** button to execute the search.

Application Status









Medicare plan application status

IFP Off Exchange

IFP On Exchange

Medicare

Filter and Sort 

Name	Application status	Plan name	Confirmation number
Steve	 Approved	Medicare Supplement Plan A Apr18	SCOP21012 
Venus	 Received	Medicare Supplement Plan A Apr18	SCOP21012 
RASHID	 Action Required - On Hold Due to Missing Info	Medicare Supplement Plan A Apr18	DRX009072 
BRIAN	 Processing	Medicare Supplement Plan A Apr18	DRX009072 

4

[View Application Status](#)

The search results are returned and sorted in the order you selected.

Each result displays the applicant's:

- Name
- Application status
- Plan name
- Confirmation number

4. To view details, click the **Expand** arrow.

Application Status

Medicare plan application status

- IFP Off Exchange
- IFP On Exchange
- Medicare**

Filter and Sort X

Name Venus	Application status Received	Plan name Medicare Supplement Plan A Apr18	Confirmation number SCOP210121	
---------------	--------------------------------	--	-----------------------------------	--

Name RASHID	Application status Action Required - On Hold Due to Missing Info	Plan name Medicare Supplement Plan A	Confirmation number DRX009072	
----------------	--	---	----------------------------------	--

Application requires additional information. Please contact the Support team.

Date of birth 04/03/1952	Medicare ID 9A	Subscriber ID N/A	Email address N/A
Plan type Med Supp	Specialty plans N/A	Coverage effective date N/A	Other subscribers N/A
Producer name N/A	Producer ID #####0494	Agency name N/A	Agency/Super Producer ID N/A
Application submitted date 04/30/2019	Application source DRX		

[View Application Status](#)

Additional details are shown including:

- Application submitted date
- Medicare ID
- Subscriber ID
- Email address
- Producer of record

Note – Hover Text

If you hover your mouse over the **Application status**, additional information about the status is displayed.

When contacting Producer Services, please provide the Application Confirmation Number and Application Status Message.

Application Status

Status Options

Here are the different status options that will be displayed and the text you will see when hovering over the status.

Status Displayed	Hover Text
Closed due to Incomplete Application	Closed due to missing info or by request. Please re-apply if needed.
Closed by Request	Closed due to missing info or by request. Please re-apply if needed.
Declined in Underwriting	Application has been declined during Underwriting process. Contact the Support team for details.
At Prospect's Request	None
Processing. No issues to report	Application is currently being processed.
See status below	Application is currently being processed
Submitted to CMS for approval	None
Please contact our Support team.	None
CMS approved request to enroll	None

Application Status, Continued

Status Options

Here are the different status options that will be displayed and the text you will see when hovering over the status.

Status Displayed	Hover Text
Approved	Application has been approved. Member will be/is active on effective date.
Request to cancel was received	None
Terminated by Request	None
Contact Producer Services	Contact your broker or Customer Support
Enrollment Denied by CMS	Enrollment Denied by CMS
ID Card Sent	ID Card Sent
Received	Application has been received.
Terminated	Application cancelled before effective date.



Prospect Application Status Site



Medicare plan application status

[Data Update Details](#)

Text size: [A](#) [A](#)

To check your application status, enter required information below (marked with *).

First Name *

Last Name *

Date Of Birth *

Medicare ID Number *

Confirmation Number/Application ID

I'm not a robot



Search

Clear form

Prospect Application Status

You can share the confirmation number with your client, so they too can check the status of their application.

Link to Prospect Application Status Site:

[BrokerWebApp: Blue Shield of California \(blueshieldca.com\)](https://www.blueshieldca.com)

Contact Us

Customer Service: (800) 393-6130
Pre-admission: (800) 541-6652
Technical Support (800) 393-6130

Blue Shield of California
PO Box 272540
Chico, CA 95927-2540

Quick Links

[Home](#)
[About Blue Shield](#)
[Contact Us](#)
[Media Center](#)

Get Social



© California Physicians' Service DBA Blue Shield of California 1999-2024. All rights reserved. California Physicians' Service DBA Blue Shield of California is an independent member of the Blue Shield Association.

Health insurance products are offered by Blue Shield of California Life & Health Insurance Company. Health plans are offered by Blue Shield of California.



Client List

Broker Connection Site

[View Section](#)

Client List (OLCL) Recent Updates

- Powerful data exporting options
- Send ID cards to the client
- Send Payment reminders to the client

Highlights

The Client List displays your prior and newly enrolled clients.

Please note that pending and prospective clients are not displayed on this list.

To view pending or prospective clients, refer to your Dashboard in the "Compare Plan & Enroll" application.

Client List

Site help [Get ID card](#) Search

blue california | broker connection

Individual & Family ▼ Medicare ▲ Small Business ▼ Large Groups ▼ Resources ▼

MEDICARE

- 1 [View Client List](#) >
- [Compare Plans & Enroll](#) >
- [View Application Status](#) >
- [News & FAQs](#) >
- [Sales and Marketing Collateral](#) >
- [Enrollment Materials](#) >

- [Medicare Eligible Home](#) >
- [Products](#) >
- [MA-PD/PDP Certification](#) >
- [Policies & Procedures](#) >
- [Renewals](#) >
- [Training and Resources](#) >

- [Product Cycle Updates](#) >
- [Help Medicare Supplement Clients](#) >
- [Help MA-PD Clients](#) >
- [Help PDP Clients](#) >
- [Tools & Resources](#) >
- [Contact Sales and Support Offices](#) >

Producer ▼

Main Menu

The Client List displays your prior and newly enrolled clients.

Note

Pending and prospective clients are not displayed on this list.

To view pending or prospective clients, refer to your Dashboard in the **Compare Plan & Enroll** application.

Click on the **Medicare tab** on the navigation bar to open the menu.

1. Select **View Client List** from the menu.

Select to change dashboard view

Line of business
 Medicare ▼ [Change](#)

Clients

- [View my clients](#) >
- [Manage payments](#) >
- [Get ID card](#) >

Enrollment

- [Start enrollment](#) >
- [Check application status](#) >

Key cycle

- [Important Medicare cycle](#) >
- [Underwriting guidelines](#) >
- [Order materials](#) >



Client List

[Data Update Details](#)

[Payment FAQ](#)

Individual & family

Medicare

Small Business

Hide Filters

Enter search criteria or select a filter here to view specific subscriber results.*

Subscriber First Name

Subscriber Last Name

Subscriber Plan Type

Medicare Supplement Plans

Subscriber ID

Subscriber Payment Status

View all

Payment Due Date

View all

Sort By

Default

2

Search

Clear form

Showing results 1 - 10 of 163

[Download client list](#)

of records 10

[Expand All](#)

Payment status

Name

Subscriber ID

Plan

ID card

Manage payments

Last Payment Received

Agent Offline

Viewing Your Client List

To perform a search, enter at **least one** criteria in its corresponding field.

Example:

Use the filters (highlighted in yellow) to narrow your search by Subscriber Plan Type:

- Medicare Supplement Plans
- MAPD
- PDP

You can sort the results by:

- Payment Status
- Last Name
- Subscriber ID

2. Click the **Search** button to execute the search.

Note:

To clear search results, click the **Clear Form** button.

[Data Update Details](#)

[Payment FAQ](#)

Client List

Showing results 1 - 10 of 228 [Download client list](#)

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⁱ	Manage payments ⁱ	Last Payment Received
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80

Get ID Cards

The Client List provides a snapshot of your client's enrollment data including:

- Payment Status
- Name
- Subscriber ID
- Plan Name
- ID Card
- Manage Payments
- Last Payment Received

You can provide a copy of your clients' ID Card by downloading a PDF version for print, sending their ID via email, or emailing instruction to download via the Member Portal.

3. Click **Get ID card** to view options to send the ID card.

Client List

[Get ID Cards](#)

The screenshot shows the Client List interface with two pop-up windows. The first window, titled "Select coverage ID", has a radio button selected for "Medical" and a "Continue" button circled in red with the number 4. The second window, titled "Select delivery method", has three radio button options: "Download ID card (PDF)", "Send ID card (PDF) via email", and "Receive ID card via member portal". The "Download ID card (PDF)" option is circled in red with the number 5. The background shows a table of client records with columns for status, name, ID number, plan name, and a "Get ID card" link.

Status	Name	ID Number	Plan Name	Action	Payment
CURRENT	FRIDAY	980336		Get ID card	\$2.00
LATE	RAMIRO	703500		Get ID card	\$610.00 Statement
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	\$568.35
CANCELLED	LAZARUS	703500190	Blue Shield 65 Plus (HMO)	Get ID card	\$120.00
CURRENT	DAVIN	7035001	Blue Shield Coordinated Choice Plan (HMO)	Get ID card	\$34.80

When you click on Get ID card, you will see a pop window with your client's available ID cards for their plans.

In some cases, the ID card may not be ready yet; however, you can email your client to let them know, and help them schedule services with their provider by clicking the send email button.

- Select** the Coverage and click continue.
- Select** a method to provide this ID card to your client and click continue.

Example:

To download the ID card, select the download option and click Continue.

A PDF of the ID will be downloaded for printing.



Client List

Get ID Cards

Showing results 1 - 10 of 228 [Download client list](#) Show Filters

Payment status	Name	Subscri	Last Payment Received
CURRENT	HEATH	980336	\$2.00
CURRENT	FRIDAY	980336	\$2.00
LATE	RAMIRO	703500	\$610.00 Statement
LATE	SACHIN	980336	\$568.35
LATE	DHONI	980336	\$568.35
LATE	JASON	980336	\$117.80
LATE	KEIRON	9803360	\$117.80

Send ID card

6

To: test23@bsc23.com

Subject: Receive Blue Shield ID card(s)

Dhoni Singh,

We have attached your Blue Shield of California ID card as a PDF. It also includes cards for your dependents, if any.

If you need anything else, please don't hesitate to reach out to my office.

Thank you for your business.

60366236_ID_Card.pdf (63 KB)

[Back](#) [Send](#)

of records 10 [Expand All](#)

« « 1 2 3 4 5 ... 23 » »

Or you can select Send ID card by email and an email form will display with the client's email address prepopulated.

Please note, for security reasons, you can't change the email address.

- Add** any additional information to the body of the email and **click send**.

Client List

Get ID Cards

Showing results 1 - 10 of 228 [Download client list](#)

Payment status	Name	Subscri	Last Payment Received
CURRENT	HEATH	980336	\$2.00
CURRENT	FRIDAY	980336	\$2.00
LATE	RAMIRO	703500	\$610.00
LATE	SACHIN	980336	\$568.35
LATE	DHONI	980336	\$568.35
LATE	JASON	980336	\$117.80
LATE	KEIRON	980336	\$117.80
CURRENT	JOSEPH	703500	\$636.00

Send member instructions

7 To: test23@bsc23.com

Subject: Receive Blue Shield ID card(s)

Dhoni Singh,
 You can use the information below to schedule services with your provider.
 Member ID: 98033608
 Group #: W00517

To receive your Blue Shield ID card(s):

1. Log in to the Blue Shield Member website.
2. Go to the profile menu and select 'ID card'.
3. Download your Blue Shield of California ID card(s). It also includes cards for your dependents, if any.

If you need anything else, please don't hesitate to reach out to my office.
 Thank you for your business.

[Back](#) [Send](#)

«« « 1 2 3 4 5 ... 23 » »

To send via email, select the "Receive ID card via member portal", and click continue.

A form is displayed with the client's Member ID and directions for logging to the Member Portal.


Again, for security reasons, you won't be able to send an email to yourself or receive a copy of the email.

7. Click send.






Client List

[Data Update Details](#)

[Payment FAQ](#)

Showing results 1 - 10 of 228  [Download client list](#)

of records [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card 	Manage payments 	Last Payment Received
CURRENT	HEATH	9803361 	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
CURRENT	FRIDAY	9803361 	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement
LATE	SACHIN	9803360 	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80

8

Manage Payments

Manage Payments allows you to set up a monthly autopay or make a one-time payment.

8. Click **Set up autopay or make a payment** to view options for your client.

Client List

Manage Payments

Client List

Individual & family | Medicare

Showing results 1 - 10 of 228 [Download client list](#)

Manage payments

1 Manage | 2 Method | 3 Confirmation

Select a payment option

Set up autopay **9**

Make a payment

Cancel | Continue

[Terms and conditions](#)

Payment status	Name	Subsidy	Last Payment Received
CURRENT	HEATH	9803	\$2.00
CURRENT	FRIDAY	9803	\$2.00
LATE	RAMIRO	7035	\$610.00 Statement
CURRENT	DAVIN	7035001	\$34.80

You will have two options:

- Set up autopay
- Make a payment

Example 1:

For this example, we will walk you through the steps of setting up an autopay for your client.

9. Select **Set up autopay** and click **Continue**.



Client List

Manage Payments

The screenshot shows the 'Client List' page with a modal window titled 'Set up autopay'. The modal has a progress bar with three steps: 'Manage' (checked), 'Method' (selected), and 'Confirmation'. Below the progress bar, it says 'Set up autopay' and 'Select the payment method that you want to link to this account.' There is a dropdown menu labeled 'Payment method' with a red circle around the number '10' next to it. At the bottom of the modal are 'Back' and 'Submit' buttons. The background shows a table with columns for 'Payment status', 'Name', 'Subscription ID', 'Last Payment Received', and 'Amount'. The table has three rows of data.

Payment status	Name	Subscription ID	Last Payment Received	Amount
CURRENT	HEATH	9803	\$2.00	
CURRENT	FRIDAY	9803	\$2.00	
CURRENT	DAVIN	703500	\$34.80	

10. Next, select the payment method from the drop-down list:

- Credit or debit card
- Checking account
- Saving account

Click **Submit** to go the next step.

Client List

Manage Payments

11. Complete the Set-up autopay form:

- Select payment method from the drop-down menu
- Complete the banking information including:
 - Name on the Account
 - Account Number
 - Routing Number
- Member email address

Click **Submit** to go the next step.



Client List

Manage Payments

The screenshot shows the 'Client List' page with a modal window open. The modal has a progress bar at the top with three steps: 'Manage' (checked), 'Method' (checked), and 'Confirmation' (active, with a '3' in a blue circle). Below the progress bar is a green checkmark icon and the text: 'Autopay has been successfully added for Friday Morning'. Underneath, it says: 'Your next payment will be on 09/30/2023. You will be billed every last day of the month.' At the bottom of the modal are two buttons: 'Print as PDF' and 'Close'. A red circle with the number '12' is drawn around the 'Close' button. The background shows a table with columns for 'Payment status', 'Name', 'Subs...', and 'Last Payment Received'. The table has three rows of data.

Payment status	Name	Subs...	Last Payment Received
CURRENT	HEATH	9803	\$2.00
CURRENT	FRIDAY	9803	\$2.00
CURRENT	DAVIN	703500	\$34.80

12. A confirmation screen will display.

You have the option to print the confirmation as a PDF.

Click **Close** to exit out of the payment set-up and return to the main Client List screen.

Client List

[Data Update Details](#)

[Payment FAQ](#)

Showing results 1 - 10 of 228 [Download client list](#)

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⁱ	Manage payments ⁱ	Last Payment Received
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00 Statement
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80

13

Manage Payments

Example 2:

Manage Payments allows you to set up a monthly autopay or make a one-time payment.

13. Click **Set up autopay or make a payment** to view options for your client.



Client List

[Manage Payments](#)

You will have two options:

- Set up autopay
- Make a payment

For this example, we will walk you through the steps of making a payment for your client.

14. Select **Make Payment** and click **Continue**.

Client List

Individual & family | Medicare

Showing results 1 - 10 of 228 | [Download client list](#)

Payment status	Name	Subs	Last Payment Received
CURRENT	HEATH	9803	\$2.00
CURRENT	FRIDAY	9803	\$2.00
LATE	RAMIRO	7035	\$610.00 Statement
CURRENT	DAVIN	703500	Blue Shield Coordinated Choice Plan (HMO) Get ID card Set up autopay or Make a payment \$34.80

Manage payments

Select a payment option

Set up autopay

Make a payment

[Cancel](#) | [Continue](#)

[Terms and conditions](#)



Client List

Manage Payments

15. Choose an amount to be paid:

- Current balance
- Enter a custom amount

Click **Continue** to go to the next step.

Client List

Manage Payments

16. Select the payment method:

- Account shown
- Or add a new payment method

Enter the **members email** and click **Continue**.



Client List

Manage Payments

17. Review the payment details and click **Submit** to make the payment.

Client List

Individual & family Medicare

Showing results 1 - 10 of 228 [Download client list](#)

Make a payment

This payment will be made on 09/07/2023.

Review payment

Amount
Custom amount: \$2.00

Payment method
Checking ****6789

Member email
fridaym@email.com

17

[Back](#) **Submit**

Payment status	Name	Subscription ID	Plan	Last Payment Received
CURRENT	HEATH	9803		\$2.00
CURRENT	FRIDAY	9803		\$2.00
LATE	RAMIRO	7035		\$610.00 Statement
CURRENT	DAVIN	703500192	Blue Shield Coordinated Choice Plan (HMO)	\$34.80

Client List

Manage Payments

Client List

Individual & family **Medicare**

Showing results 1 - 10 of 228 [Download client list](#)

Payment status	Name	Sub#
CURRENT	HEATH	980
CURRENT	JOSEPH	703
CANCELLED	LAZARUS	703
CURRENT	DAVIN	703

Payment successful

Confirmation details

Client name Zackery Dalton	Custom amount \$22.00
Subscriber ID 910032650	Confirmation number 1009187649
Member email zackery60319513@pod5auto mation.com	Payment date 09/20/2023
Payment method Star ****0011	Processing time 1-2 business days
Autopay Off	

[Print as PDF](#)
Close

18

3. Click **Close** to dismiss the pop-up window and return to the main Client List screen.

Client List

[Data Update Details](#)

[Payment FAQ](#)

Showing results 1 - 10 of 228 [Download client list](#)

19

of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card ⁱ	Manage payments ⁱ	Last Payment Received	
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00	▼
CURRENT	FRIDAY	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00	▼
LATE	RAMIRO	7035003	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$610.00	▼
LATE	SACHIN	9803360	Blue Shield Inspire (PPO)	Get ID card	Set up autopay or Make a payment	\$568.35	▼
CANCELLED	LAZARUS	7035001	Blue Shield 65 Plus (HMO)	N/A	Set up autopay or Make a payment	\$120.00	▼
CURRENT	DAVIN	7035001	Blue Shield 65 Plus (HMO)	Get ID card	Set up autopay or Make a payment	\$34.80	▼

20

Download Client List and Statements

- 19. Client data can be exported to Excel and sorted to your specifications by clicking the **Download client list link**
- 20. Click **Statement** to view the current statement.



Client List

Client List [Data Update Details](#)

Individual & family **Medicare** Small Business [Payment FAQ](#)

[Show Filters](#)



Showing results 1 - 10 of 228 [Download client list](#) # of records 10 [Expand All](#)

Payment status	Name	Subscriber ID	Plan	ID card 	Manage payments 	Last Payment Received
CURRENT	HEATH	9803361	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00

 21

Subscriber Information

Client Information	Plan information	Additional Products	Rate Section	Additional Billing Info	Members on policy
Subscriber Name: HEATH	Plan renewal date: 01/01/2024	Dental Plan N/A	Subscriber Rate Change: N/A	Payment due date: 09/01/2023	Household Savings N/A
Address 373 SONY ROAD, CA, 940	Cancellation date: N/A	Rate Change date: N/A	Bill Type Social Security Withhold		
Phone (965) 847	Original enrollment date: 08/01/2023	Rate notification date: N/A	Bill Frequency: Monthly		
DOB 03/03/1951	Application id 519	Rate region N/A			
Member registered email N/A	Application email N/A	National producer ID 152			

Payment status	Name	Subscriber ID	Plan	ID card 	Manage payments 	Last Payment Received
CURRENT	FRIDAY	980336	Blue Shield AdvantageOptimum Plan (HMO)	Get ID card	Set up autopay or Make a payment	\$2.00

Viewing Your Client Details

21. Click the arrow to expand the line to view additional account details.

Click the arrow again to close the expanded details.

The additional details include:

- Demographic information for the client.
- Information regarding rate changes and notifications.
- Original effective dates and cancellation dates for those who have recently left the plan.
- The NPN for the writing agent.

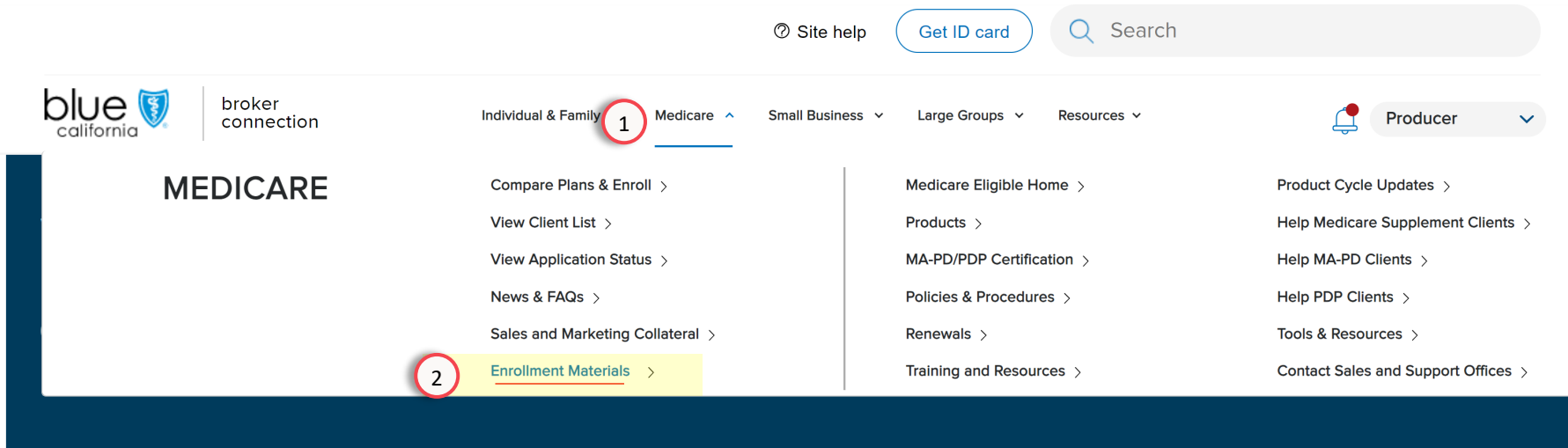


Order Presale Kits

Blue Shield Online Store

[View Section](#)

Order presale kits



Site help [Get ID card](#) Search

blue california | broker connection

Individual & Family **1** Medicare ^ Small Business v Large Groups v Resources v

Producer v

MEDICARE

- Compare Plans & Enroll >
- View Client List >
- View Application Status >
- News & FAQs >
- Sales and Marketing Collateral >
- 2** [Enrollment Materials](#) >

- Medicare Eligible Home >
- Products >
- MA-PD/PDP Certification >
- Policies & Procedures >
- Renewals >
- Training and Resources >

- Product Cycle Updates >
- Help Medicare Supplement Clients >
- Help MA-PD Clients >
- Help PDP Clients >
- Tools & Resources >
- Contact Sales and Support Offices >

Ordering Steps

1. Click the **Medicare** tab at the top of the page.
2. Select **Enrollment Materials** for the list.

Select to change dashboard view

Line of business
Medicare v [Change](#)

Clients

- [View my clients](#) >
- [Manage payments](#) >
- [Get ID card](#) >

Enrollment

- [Start enrollment](#) >
- [Check application status](#) >

Key cycle

- [Important Medicare cycle](#) >
- [Underwriting guidelines](#) >
- [Order materials](#) >



Order presale kits

Ordering Steps

The screenshot shows the Blue Shield of California storefront. At the top left is the logo "blue of california". To the right are icons for home, user, shopping cart, calendar, and help. A navigation menu on the left is highlighted with a blue border and contains the following items:

- 4 - BSC MAPD (expanded)
 - Alameda
 - Fresno
 - 5 - Kern (highlighted)
 - Los Angeles
 - Madera
 - Merced
 - Orange
 - Riverside
 - San Bernardino
 - San Diego
 - San Joaquin
 - San Luis Obispo
 - San Mateo
 - Santa Barbara
 - Santa Clara
 - Stanislaus
- ▶ BSC PDP
- ▶ BSC MEDSUPP
- ▶ BSC OTHER
- ▶ BSC IFP

The main content area has a blue header with "Welcome, Broker". Below it is a blue banner that reads: "Welcome to the newly designed DIGITAL ONLY Blue Shield of California storefront." The text below the banner says: "Here you will order Medicare materials for the Medicare Annual Enrollment Period. To place an order for **Presale Materials**, please select the product line in the upper left hand corner for which you would like to order materials." Below this is a list of two items:

- Order received by 10 a.m. will process same day and ship within 2-3 days.
- Order received after 10 a.m. will process next day.

A "Note:" section follows with one bullet point:

- If you need to place an order with a lower quantity that is offered as an option, please contact your Regional Sales Manager.

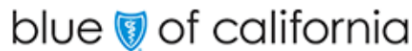
Note:

The default view of the menu is expanded for MAPD.

To expand the other sections, click the triangle.

4. Click on the **Plan type** to expand the tab.
5. Select the **County/Plan** from the list.

Order presale kits

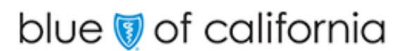


Ordering Steps

- 6. Select the type of materials you want to order.
- 7. Click the **Order** button.

The screenshot shows a web interface for a broker. At the top, it says 'Welcome, Broker'. Below that, there's a dropdown menu for 'kern' with 'presale kit' selected. A red circle with the number '6' highlights this dropdown. Below the dropdown is a card for 'Kern-65 Plus (HMO)' featuring a couple and the text 'Embrace your journey'. A blue '+ Order' button is at the bottom of the card, highlighted with a red circle and the number '7'. On the left side, there's a sidebar with a dropdown for 'BSC MAPD' and a list of counties: Alameda, Fresno, Kern (selected), Los Angeles, Madera, Merced, Orange, Riverside, San Bernardino, San Diego, San Joaquin, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, and Stanislaus. Below this are buttons for 'BSC PDP', 'BSC MEDSUPP', 'BSC OTHER', and 'BSC IFP'.

Order presale kits



Ordering Steps

- Select the **quantity**.
- Click the **Add to Cart** button.

Important:

To ensure your kits ship as soon as they are available, submit separate orders for each language,.

NOTE:

You can click the PDF icon next to the amount field to view and print the information.



Order presale kits

blue of california



10

Ordering Steps

- 10. Click on the **basket** to view the order.
- 11. Enter the shipping information.
- 12. Click **Validate Address**.
- 13. Select **Place Order** to complete the order.

▼ BSC MAPD

- Alameda
- Fresno
- Kern
- Los Angeles
- Madera
- Merced
- Orange
- Riverside
- San Bernardino
- San Diego
- San Joaquin
- San Luis Obispo
- San Mateo
- Santa Barbara
- Santa Clara
- Stanislaus

▶ BSC PDP

▶ BSC MEDSUPP

▶ BSC OTHER

▶ BSC IFP

Welcome, Broker

your order

Please review your order. The shipping address defaults to the address in your user profile (change this with the "Edit Profile" feature). To ship this order to a different address simply enter it in the fields below.

Once your order items and delivery address are confirmed click "Place Order".

Orders received by 10 a.m. (PST) will process same day and ship within 2-3 days.

Orders received after 10 a.m. will process next day.

order information

Year	Item	Description	Language	Qty	
2024	Kern-65 Plus (HMO)	Kern	English	5	✕
2024	Kern-65 Plus (HMO)	Kern	Spanish	15	✕

Your order is 8.6 lbs. If you wish to place this order click on the Place Order button below.

shipping information

11 Name

Attention

Street 1

Street 2

City State Zip

Phone

12 Validate Address

13



Marketing Materials

Download Advertising Materials

[View Section](#)


Advertising Materials

Site help [Get ID card](#) Search

Ordering Steps

1. Click the **Medicare** tab at the top of the page.
2. Select **Sales and Marketing Collateral** from the list.



Individual & Family **1** Medicare Small Business Large Groups Resources  Producer

MEDICARE

- Compare Plans & Enroll >
- View Client List >
- View Application Status >
- News & FAQs >
- 2** Sales and Marketing Collateral >
- Enrollment Materials >
- Medicare Eligible Home >
- Products >
- MA-PD/PDP Certification >
- Policies & Procedures >
- Renewals >
- Training and Resources >
- Product Cycle Updates >
- Help Medicare Supplement Clients >
- Help MA-PD Clients >
- Help PDP Clients >
- Tools & Resources >
- Contact Sales and Support Offices >

Select to change dashboard view

Line of business
Individual & family plans  [Change](#)

Clients

- [View my clients](#) >
- [Manage payments](#) >
- [Get ID card](#) >

Enrollment

- [Start enrollment](#) >
- [Check application status](#) >
- [Complete renewals](#) >
- [Get enrollment link](#) >

Key cycle

- [Important IFP cycle](#) >
- [Underwriting guidelines](#) >
- [Special enrollment guidelines](#) >
- [Order materials](#) >

Advertising Materials

Catalog > Medicare Broker Marketing Collateral

Search for Assets

Sort by Recently Added Showing 20 per page 3 < 1 2 >

4 Refine by

- Language
 - English 19
 - Chinese 2
 - Korean 1
 - Spanish 6
- Audience
 - Medicare Prospects 15
 - Medicare Brokers 4
- Plan Type
 - Medicare Supplement 4
 - Medicare Advantage 3
 - Medicare Duals 5
 - Age-In Materials 4
 - Other - Broker 4
 - Seminar Materials 5
 - AEP Materials 1

5 Common Medicare Mistakes
5 Common Medicare Mistakes and How to Avoid Them: Age-In Version
An educational booklet to help Medicare enrollees or prospective members avoid common mistakes when enrolling in Medicare.
Updated 21 hours ago

Medicare Decision Guide Booklet
Medicare Decision Guide Booklet
An educational booklet to guide prospects through Medicare and plan selection to make sure they enroll in a plan that best meet their needs.
English and Spanish versions available.
Updated 21 hours ago

TotalDual Connecting Benefits Flyer
TotalDual Connecting Benefits Flyer
A55240MADD_1024
A flyer that visually shows how Medicare and Medi-Cal benefits and services are connected under one TotalDual Plan. English and Spanish versions available.
Updated 21 hours ago

Southern California Blue Shield TotalDual (HMO D-SNP) Flyer
A53063-TD_1024
Flyer that outlines benefits and provider networks of Southern California TotalDual (HMO D-SNP) plan.
English and Spanish versions available.
Updated 21 hours ago

Medicare LIS Flyer
A52562-FF_1024
A flyer that encourages Medicare beneficiaries to contact you to find out if they qualify for LIS/Extra Help paying for a portion of their prescription drugs.
English and Spanish versions available.
Updated 21 hours ago

Blue Shield TotalDual DSNP Comparison Flyer
Blue Shield TotalDual DSNP Comparison Flyer
A55240MED_1024
A flyer that compares benefits and services of Original Medicare, Medi-Cal and the Blue Shield TotalDual HMO D-SNP plan.
English and Spanish versions available.
Updated 21 hours ago

Ordering Steps

3. Navigate between pages using the **forward and back** buttons.
4. Filter the catalog by **selecting one or more options from the left panel.**
5. To select marketing collateral, **click on the item.**

Pro Tip:
For quicker access to an item, you can click the **heart icon** to save it to your favorites.

You can also click the **pencil icon** on each item card to customize it with your personalized contact information.

Advertising Materials

Ordering Steps

A preview of the marketing collateral is displayed.

6. Click the **Customize** button to add your personalized contact information.

Catalog > 2025 Medicare Broker Marketing Collateral > TotalDual Connecting Benefits Flyer

TotalDual Connecting Benefits Flyer ♥

TotalDual Connecting Benefits Flyer
A55240MADD_1024

A flyer that visually shows how Medicare and Medi-Cal benefits and services are connected under one TotalDual Plan. English and Spanish versions available.

Plus, you will have a dedicated care coordinator (like a nurse) that will help you understand how to use these benefits and services.

Contact your authorized Blue Shield Medicare adviser for a benefits review today

Name:
Email:
Phone:
Hours:

H2819_24_G20A_M 09182024

Share Customize

6



Advertising Materials

Ordering Steps

- 7. Enter your **information**.
- 8. Click the **Preview** button to continue to the next screen.

Customize >

TotalDual Connecting Benefits Flyer

TotalDual Connecting Benefits Flyer
A55240MADD_1024
A flyer that visually shows how Medicare and Medi-Cal benefits and services are connected under one TotalDual Plan. English and Spanish versions available.

7 Language*
English

First name*

Last name*

Phone number

TTY

Operating hours

Agent url/email

Prefill Options
Cancel
Preview

View

Page

<
>

1 of 1

Zoom

-
+

100%

8

Advertising Materials

Ordering Steps

9. To complete the customization and exit the screen, click the **Done** button.

Customize >

TotalDual Connecting Benefits Flyer

TotalDual Connecting Benefits Flyer
A55240MADD_1024
A flyer that visually shows how Medicare and Medi-Cal benefits and services are connected under one TotalDual Plan. English and Spanish versions available.

Language*
English

First name*
Broker

Last name*
Agent

Phone number

TTY

Operating hours

Agent url/email

9

Prefill Options Cancel **Done**

Blue Shield TotalDual Plan (HMO D-SNP) offers all these benefits and more at no extra cost to you

- Durable medical equipment
- Community-based adult services
- In-home supportive services
- Skilled nursing facility
- Transportation
- Personal Emergency Response System (PERS)
- Over-the-counter (OTC) Items allowance
- Fitness and wellness programs
- Medi-Cal dental
- Healthy groceries
- Hearing aids
- Medications
- Dental
- Vision

Plus, you will have a dedicated care coordinator (like a nurse) that will help you understand how to use these benefits and services.

Contact your authorized Blue Shield Medicare adviser for a benefits review today Name: Broker Agent
Hours:

H2819_24_620A_M 09182024

View □ ☰ Page < > 1 of 2 Zoom - + 100%

Advertising Materials

Ordering Steps

The screenshot shows a user interface for advertising materials. At the top, there is a search bar labeled 'Search for Assets' and navigation links for 'Back to customization' and 'Back to catalog'. The main content area displays a customized advertisement for the 'Blue Shield TotalDual Plan (HMO D-SNP)'. The ad features the Blue Shield California logo and a list of benefits including durable medical equipment, community-based adult services, in-home supportive services, skilled nursing facility, transportation, personal emergency response system (PERS), over-the-counter (OTC) items allowance, fitness and wellness programs, healthy groceries, hearing aids, medications, vision, and dental. A pink box highlights that users will have a dedicated care coordinator. At the bottom of the ad, there is contact information for a Blue Shield Medicare adviser. Below the ad, a 'Download' button is circled in red with the number 10. To the right of the ad, a 'Back to catalog' link is circled in red with the number 11.

10. Click the **Download** button save and print your marketing collateral.
11. To return to the main screen, click the **Back to Catalog** link at the top right of screen.



Commission Statements

Broker Connection Site

[View Section](#)

New Commission Statements

Accessing Commission Statements

Under **Resources**, you can access your commission statements.

- 1. Click **Broker Compensation**

Site help Get ID card Search

blue california broker connection Individual & Family Medicare Small Business Large Groups Resources Producer

RESOURCES

- 1 **Broker Compensation** >
- Advertising & Marketing Resources >
- Order Materials >
- Update Your Profile >
- Direct Deposit >
- Manage your accounts >
- Rewards & Commissions >
- Mandates Information >
- Personalize Your Website >
- Email Producer Services >
- Broker Communications >
- Broker of Record Change >
- Quick Links for Brokers >
- Tools & Resources >
- Find a Doctor >
- Pharmacy >
- Health & Wellness >
- Contact Us >
- Be a Blue Shield of CA Broker >

Select to change dashboard view

Line of business Medicare Change

Clients

- View my clients >
- Manage payments >
- Get ID card >

Enrollment

- Start enrollment >
- Check application status >

Key cycle

- Important Medicare cycle >
- Underwriting guidelines >
- Order materials >



Check Out All The Features...



Statement Detail Extract

Select a statement to view "Statement Detail" screen, and download a .xls/.csv data extract for that statement period.

PDF Statement!

Click to download.

The screenshot shows the 'Statements' page with a table of statement records. Callout 2 points to the 'Hello,' dropdown menu. Callout 3 points to the 'Statements' link in the left sidebar. Callout 4 points to the 'Commission Detail' link in the left sidebar. A red arrow points to the 'Statement' link in the table.

<input type="checkbox"/>	Process Year	Process Month	Pay Entity ID	Pay Entity Name	Payout Type Id	Date To	
<input type="checkbox"/>	2019	4	00255	CSQHH	Commercial Payout	05/07/2019	Statement
<input type="checkbox"/>	2019	3	00255	CSQHH	Commercial Payout	04/07/2019	Statement
<input type="checkbox"/>	2019	3	00255	CSQHH	BON-ManualAdjust...	03/29/2019	Statement
<input type="checkbox"/>	2019	2	00255	CSQHH	Commercial Payout	03/07/2019	Statement

Commission Detail Report

Provides commission details for sub-brokers/writing agents who are being paid through their agency and not directly by Blue Shield.

"Pay Entity ID"

System-assigned producer ID to replace TIN on statements.

- Hello, [Broker Name]:**
This option allows brokers to exit the tool while still remaining in Producer Connection. The tool will automatically log brokers out of the Broker Compensation Tool after 10 minutes of inactivity but will still be logged-into PC.
- Statements Detail:**
The "home page" automatically defaults to the Statements webpage where brokers can select, search, view, print, and download easy-to-read PDF versions of their statements.
- Commission Detail:**
The Commission Detail webpage allows sub brokers/writing agents to search for commission information by month/year so they can view the details of a sale they participated in but did not receive a statement for the month.



New Commission Statements (Broker Only Statement)

Viewing Detail Page

Smith Insurance Company Inc
Bill Smith
Producer ID # 0012
Producer NPN # 123456789

Commission Statement

Blue Shield of California

Medicare Supplement Commissions

Writing Producer 00123456789		Smith Insurance Company, Bill Smith				NPN 123456789			
Group Number	Subscriber ID	Customer Name	Product	Effective Date	Period	Gross Premium	Base Premium	Commission Rate	Commission Paid
X000	9091	Clark, George	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
X000	9091	Bill, Marks	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
X000	9091	Sam, Hill	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
X000	9091	Jane, Smith	Med Supp	01/2025	02/2025	\$598.00	\$598.00	10.00%	\$59.80
								Total	\$239.20

All your Senior business is now located in **one statement!**

Note

Agents contracted with both Blue Shield and Blue Shield Promise, will need to contact their FMO/Agency for all Blue Shield Promise related business.

Viewing Commission Detail

Viewing Commission Detail

BSC - Commission Detail

Enter monthend period (YYYYMM): 201608

Run Report Clear Parameters Save

Process_Month	Business_Type	Broker_ID	Broker_Name	Broker_NPN	Payee_ID	Payee_Name
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L
201808	CI	48	CSLQC		48	CSLQCHW, QSCLHH L

Save

Your requested report has the following "Save as" options. Please tap one of the available items to save in that format.

- CSV (Comma-separated values): Use this format to create comma separated files, *.CSV. This format is widely adopted by many software programs, and is commonly viewed with Excel or Notepad.
- XLS (Microsoft Excel): Use this format to create a Microsoft Excel file, *.XLS. This format is commonly opened with Microsoft Excel. If the values in this format are not properly formatted, try the *.CSV option instead.
- New Window: View content in new window

Cancel

The Commission Detailed Statements provide a list of commissions paid to the writing agent for a given period (i.e. Jan, Feb, etc.).

- Enter the year and month where dues were received (08/2016 earliest).
- Click Run Report.
- To export the information, click the **Save** button.
- Select a format to save the exported information.

Note

Transactions where commissions are paid to an **FMO/Agency** will not be visible to the writing agent.

Commission Schedule

The screenshot shows the Blue Shield of California Broker Connection website. The 'Resources' dropdown menu is open, and 'Rewards & commissions' is highlighted with a red box. Other menu items include 'Broker compensation', 'Advertising & marketing resources', 'Order materials', 'Update your profile', 'Direct deposit', 'Manage your accounts', 'Mandates information', 'Personalize your website', 'Email Producer Services', 'Broker communications', 'Broker of Record Change', 'Quick links for Brokers', 'Tools & Resources', 'Find a Doctor', 'Pharmacy', 'Health & wellness', 'Contact us', and 'Be a Blue Shield of CA Broker'.

Accessing the Commission Schedule

Commissions are paid out during the **second week** of each month.

Note:

Once released, payment is delivered within 2-5 business days.

Commissions are based on paid member premiums. Premiums received after the commission cutoff date will be paid on the next commission payout date.

Producer agreement and commission schedule updates

[FAQs for Commission Schedule updates](#) (PDF, 136 KB)

[Broker Payout Calendar](#) (PDF, 49 KB)

[Commission Schedule for IFP plans, Small Business plans, and plans for Medicare beneficiaries](#) (PDF, 209 KB)

[Producer Agreement](#) (PDF, 671 KB)

Resources

Broker Connection Site

[View Section](#)



Resources

- Broker Connection Site: <https://www.blueshieldca.com/producer>
- Shield on Demand Site: <http://www.shieldondemand.com/>
- Consumer Application Status Site: <https://www.blueshieldca.com/bwa/unauth/medicareProspectAppStatus>

Footer



Contact Us

Producer Services (800) 559-5905
Employer Services (800) 325-5166

Blue Shield of California
 PO Box 272540
 Chico, CA 95927-2540

Quick Links

[About Blue Shield](#)
[Contact Us](#)
[News](#)
[Careers](#)

Send Feedback

[Terms of Use](#)
[Privacy](#)
[Sitemap](#)

Get Social

Cobrowse

© California Physicians' Service DBA Blue Shield of California 1999-2024. All rights reserved. California Physicians' Service DBA Blue Shield of California is an independent member of the Blue Shield Association.
 Health insurance products are offered by Blue Shield of California Life & Health Insurance Company. Health plans are offered by Blue Shield of California.

[Let's chat](#)

[Contact Us](#)

Blue Shield Producer Services
 Phone Number:
 1-800-559-5905

Email:
seniormarketsproducer@blueshieldca.com

For Agent Use Only. Plans contain exclusions and limitations. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

BLUE SHIELD OF CALIFORNIA 112