JANUARY 25, 2024

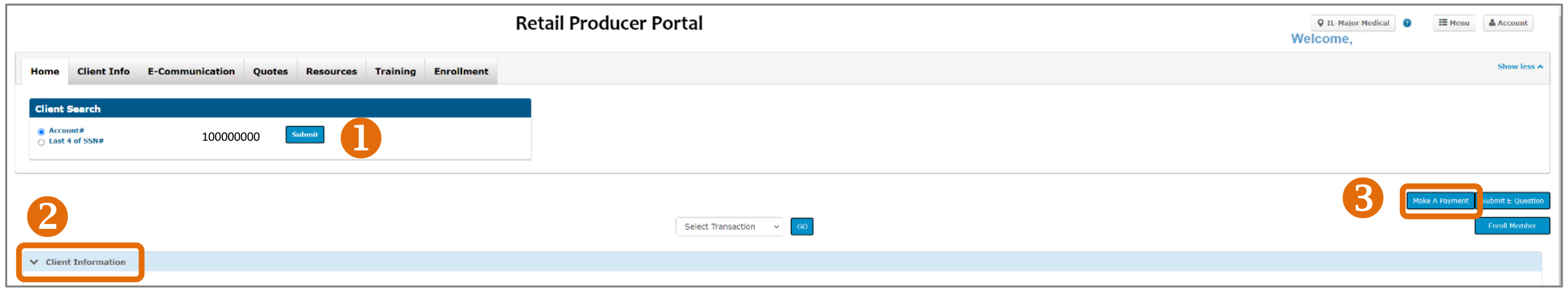
Member Payment Portal: How to Make Payments as a Broker

The Member Payment Portal will enable Brokers to set up auto bill pay and make one-time payments for their active retail members. The services discussed in this section do not pertain to Medicare clients.

Auto Bill Pay

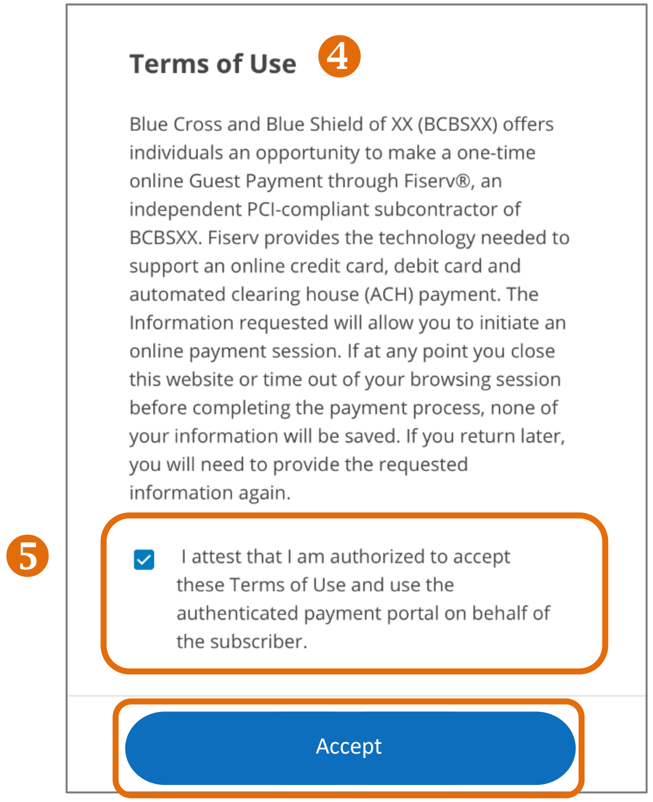
You can now easily set up auto bill pay from your Retail Producer Portal on behalf of your active retail clients.

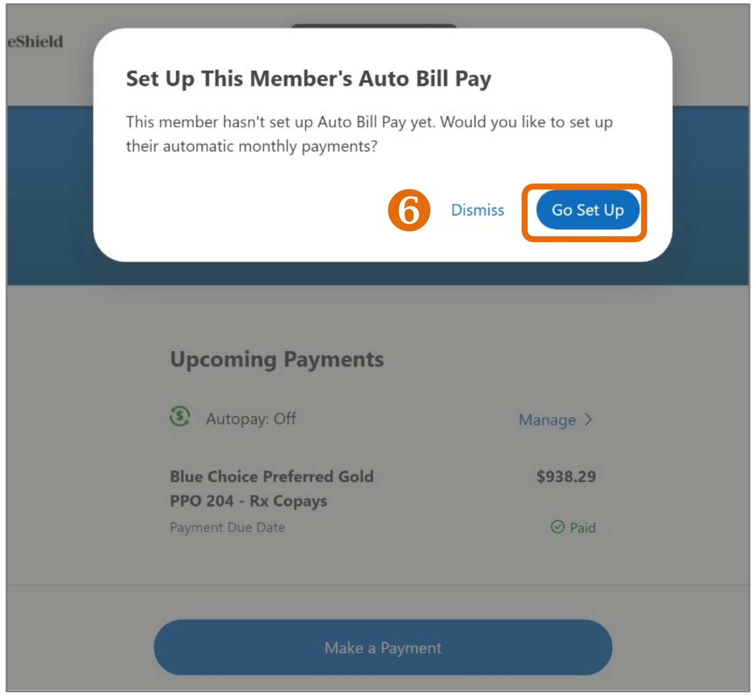
Setting up Auto Bill Pay



Retail Producer Portal

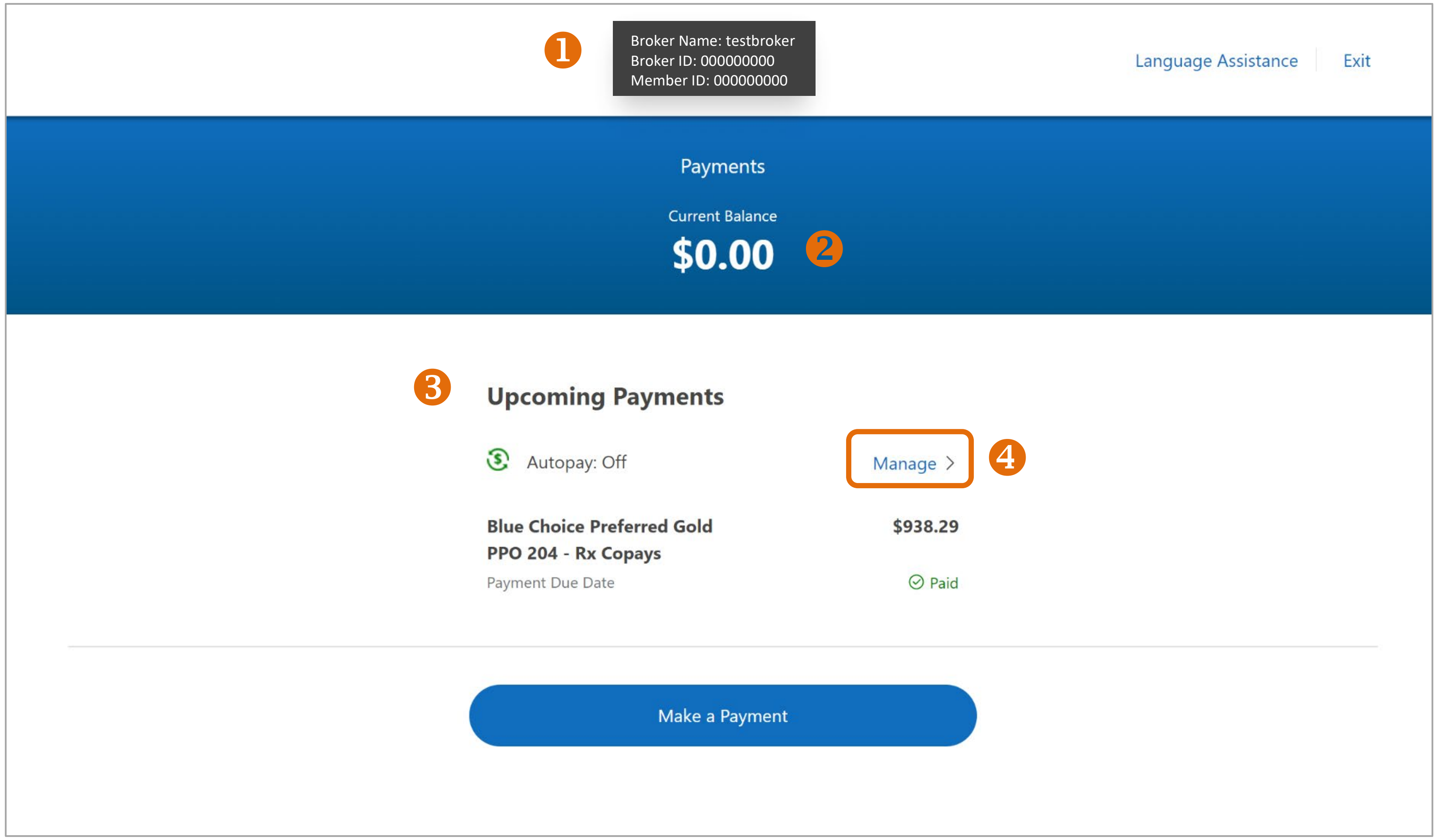
1. On the ‘Home’ page of the **Retail Producer Portal**, search for a client using the ‘Account#’ or ‘Last 4 of SSN#’ click ‘Submit’
2. The ‘Client Information’ will show below
3. To the right of the page click the ‘Make a Payment’ button
4. The MPP application will open a new window and show the ‘Terms of Use’
5. Review and check off the attestation, press ‘Accept’
6. A pop-up will appear, click ‘Go Set Up’



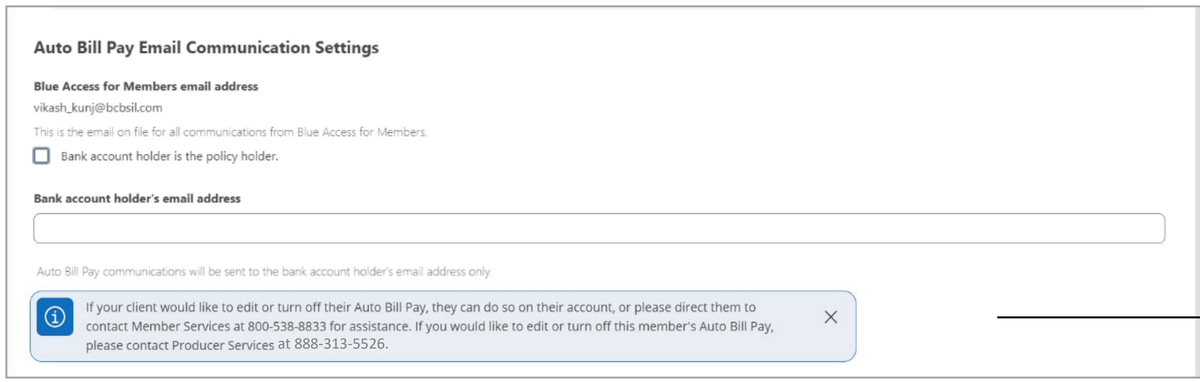


Manage Account

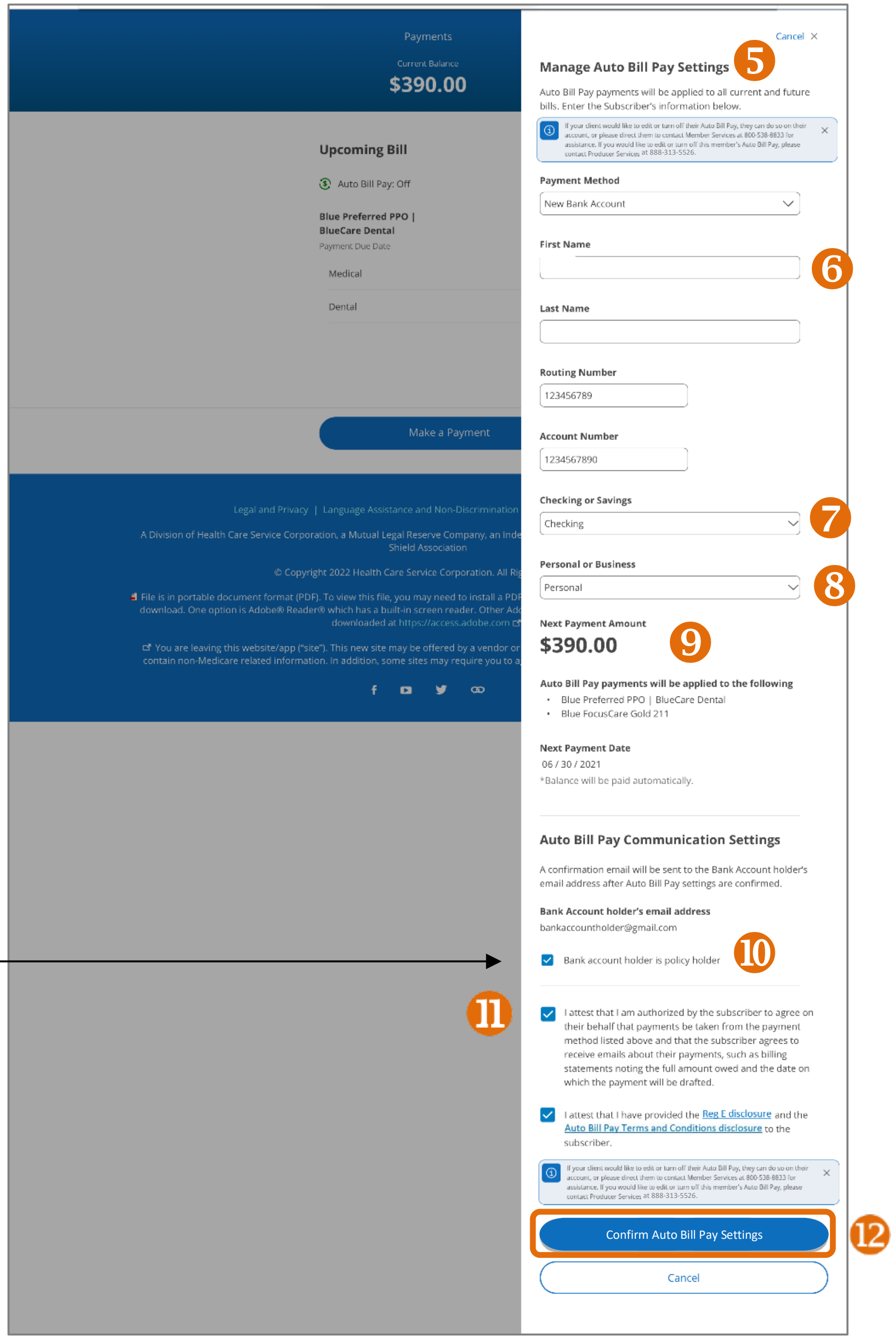
1. On the **Payments** page, you will see your Broker Name, Broker ID and Member ID at the top of the page
2. The 'Current Balance' is displayed in the blue bar
3. Below the blue bar you will see the 'Upcoming Payments' information which includes the Autopay label and the chosen health plan with the balance and due date
4. To set up 'Autopay' for your client, click 'Manage'



5. **'Manage Auto Bill Pay Settings'** pop-up will appear
6. Fill out the policy holder's personal information
7. Enter in the bank account information and select 'Checking' or 'Savings' account
8. Select 'Personal' or 'Business' account
9. Payment amount will be listed
10. If the email listed is correct, check off 'Bank account holder is the policy holder' box
11. Review the attestations closely and check off both boxes
12. Press 'Confirm Auto Bill Pay Settings'

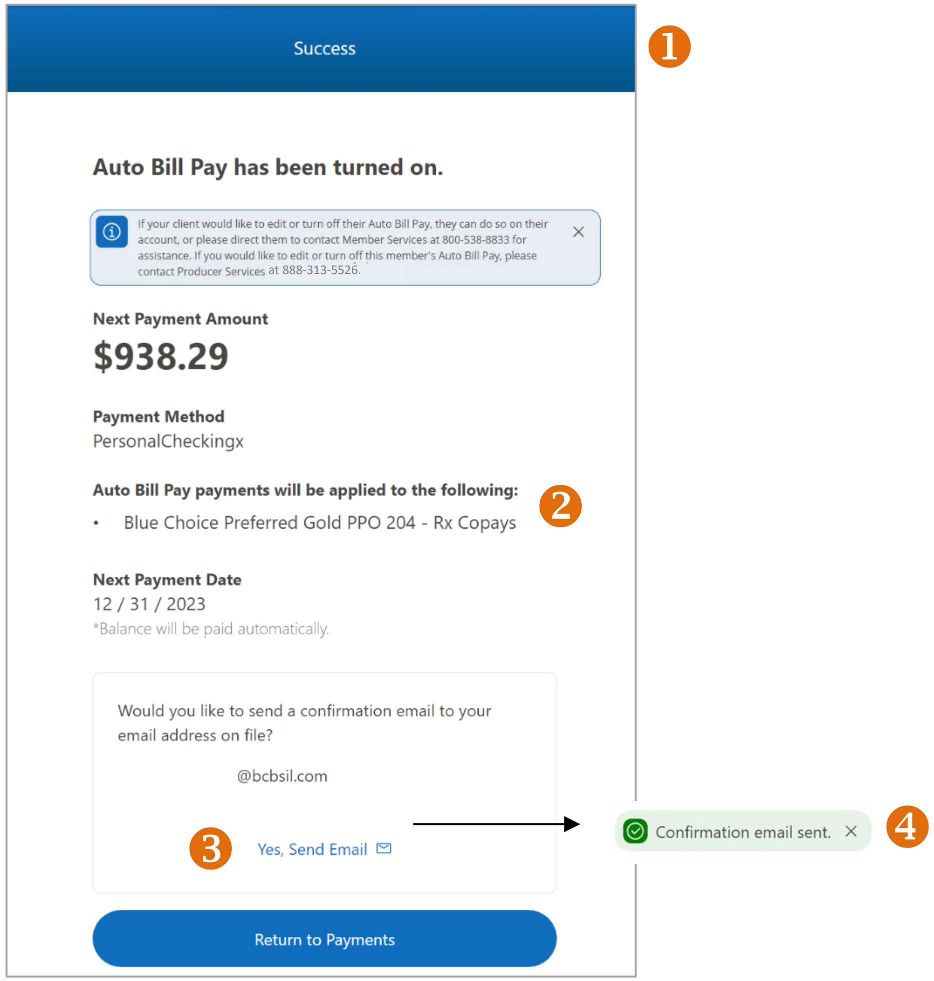


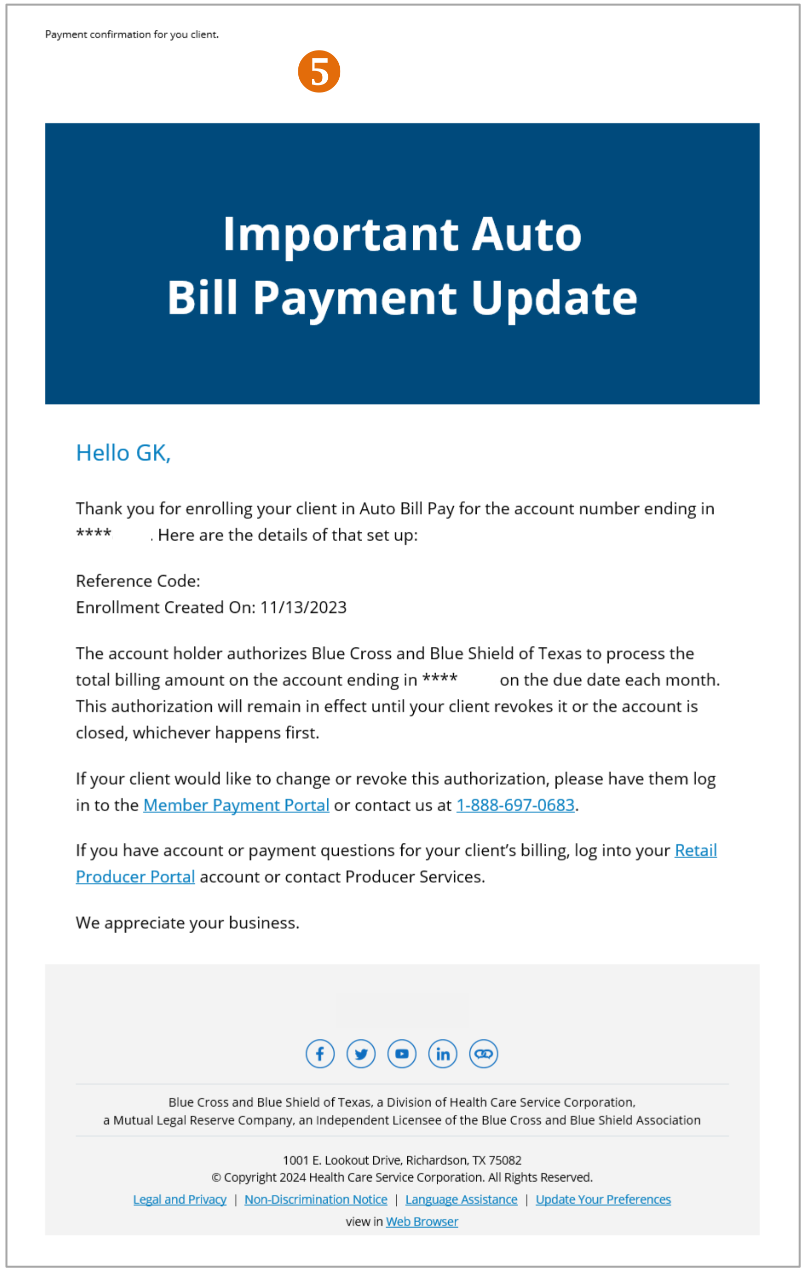
Note: If you have another email address, deselect the box. Add in new email address and continue



Payment Summary

1. You will see a **Success** page letting you know 'Auto Bill Pay' has been turned on
2. Review the payment summary
3. You can choose to send yourself a confirmation email
4. When you click 'Yes, Send Email' a green confirmation message will appear
5. Sample email sent to the agent




Payment confirmation for you client.

5

Important Auto Bill Payment Update

Hello GK,

Thank you for enrolling your client in Auto Bill Pay for the account number ending in **** . Here are the details of that set up:

Reference Code:
Enrollment Created On: 11/13/2023

The account holder authorizes Blue Cross and Blue Shield of Texas to process the total billing amount on the account ending in **** on the due date each month. This authorization will remain in effect until your client revokes it or the account is closed, whichever happens first.

If your client would like to change or revoke this authorization, please have them log in to the Member Payment Portal or contact us at 1-888-697-0683.

If you have account or payment questions for your client's billing, log into your Retail Producer Portal account or contact Producer Services.

We appreciate your business.

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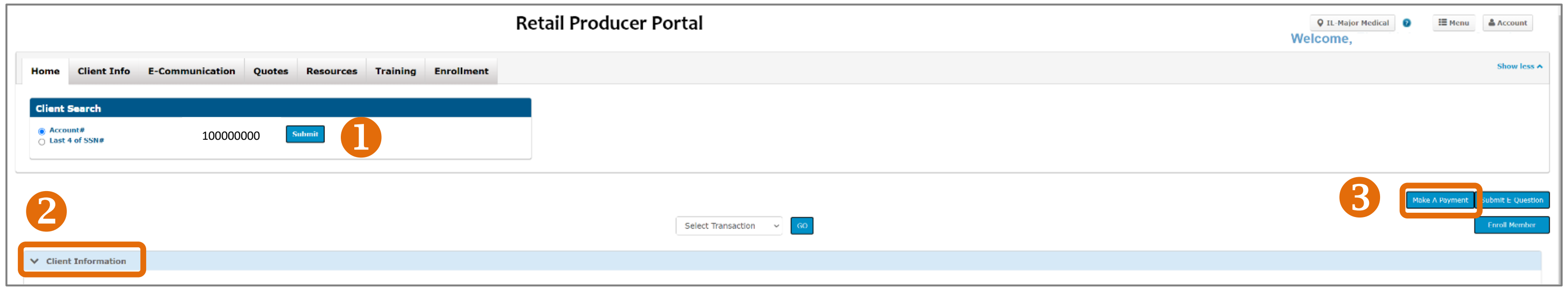
One-time Payment

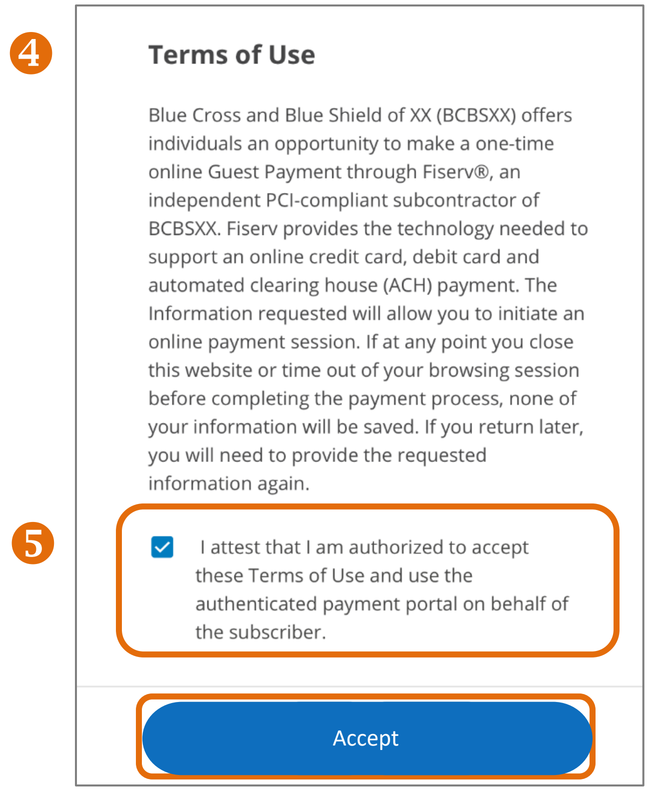
You can now easily set up a one-time payment from the Retail Producer Portal on behalf of your active retail clients. (This is not applicable for initial binder payments. For instructions on how your client can make their initial payment, please refer to page 12.)



Setting up a One-Time Payment

Retail Producer Portal

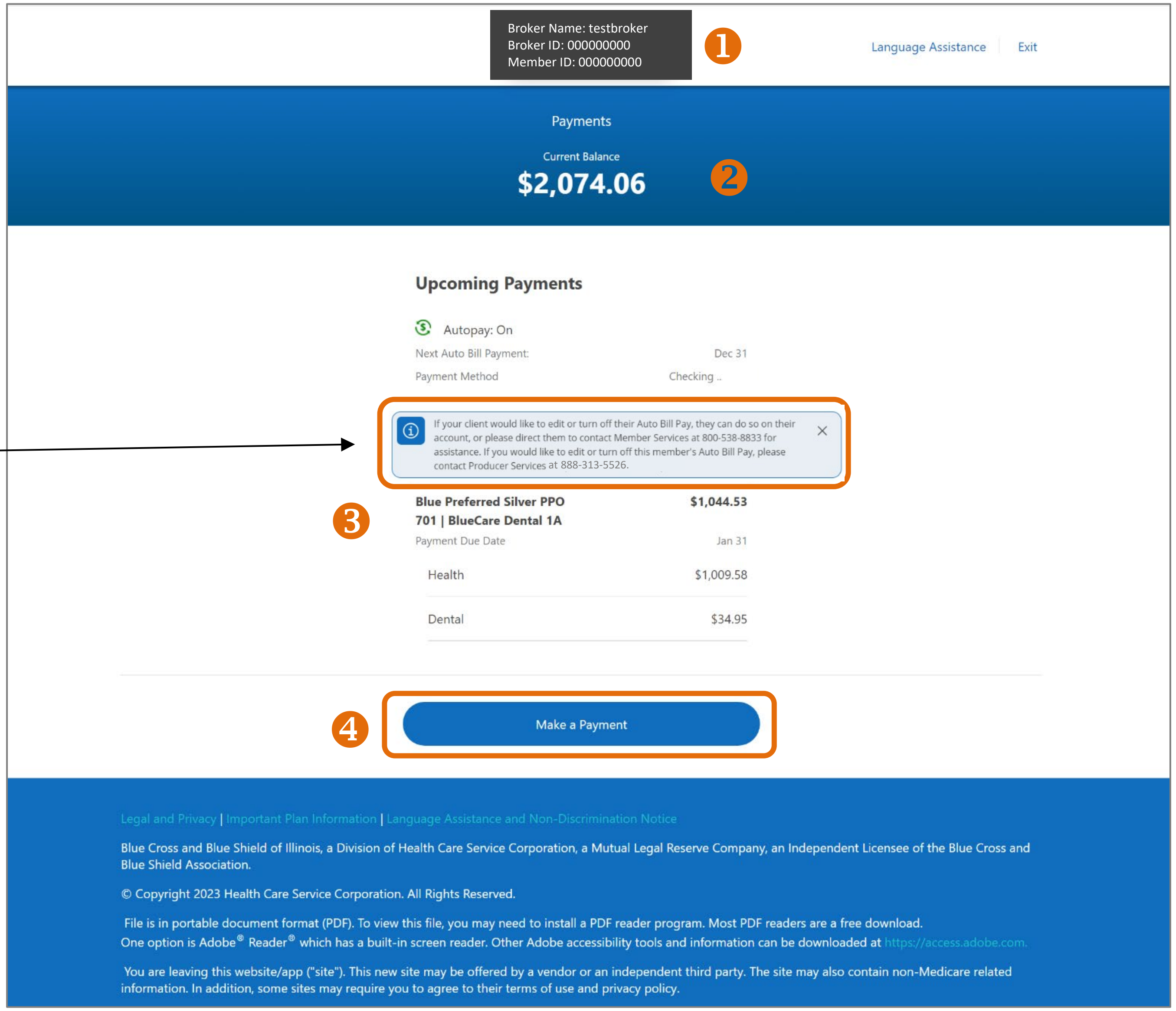
1. On the 'Home' page of the **Retail Producer Portal**, search for a client using the 'Account#' or 'Last 4 of SSN#' click 'Submit'
2. The Client Information will show below
3. To the right of the page click the 'Make a Payment' button
4. The MPP application will open a new window and show the 'Terms of Use'
5. Review and check off the attestation, press 'Accept'



Manage Account

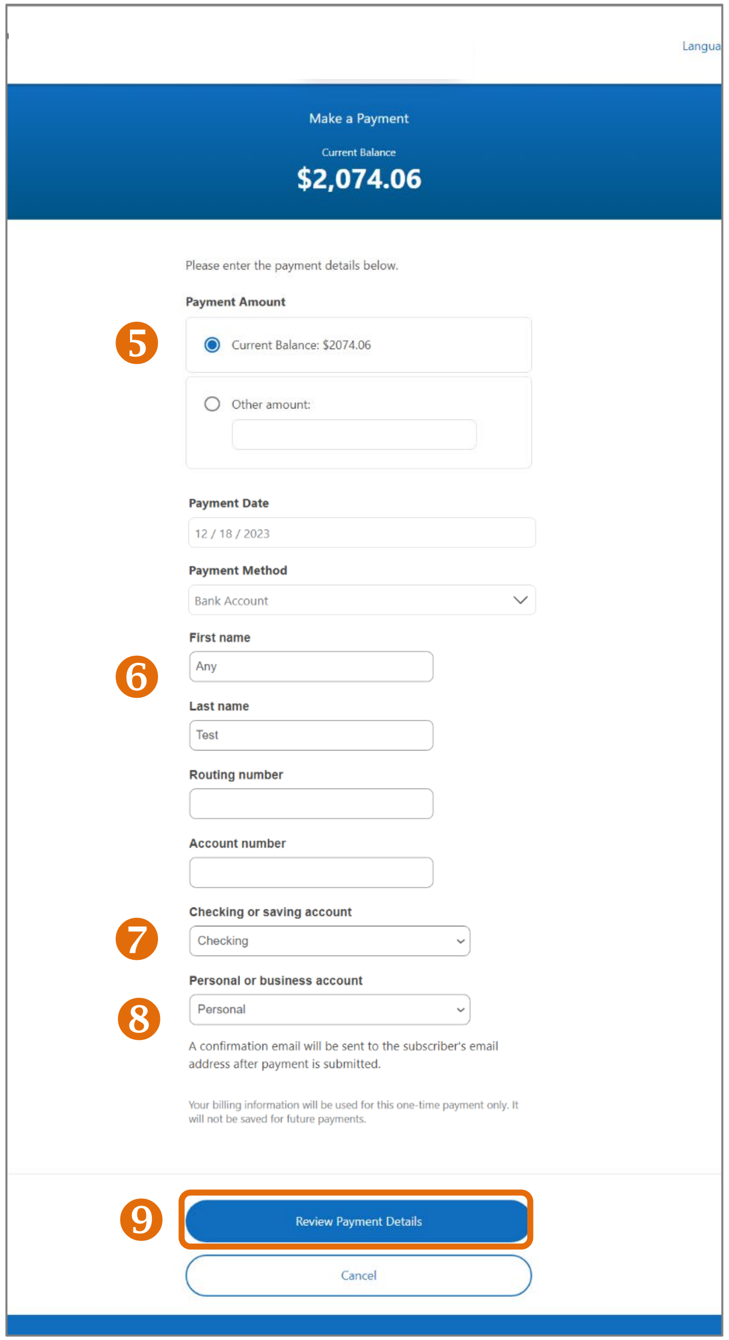
1. On the **Payments** page, you will see your Broker Name, Broker ID and Member ID at the top of the page
2. The ‘Current Balance’ is displayed in the blue bar
3. Below the blue bar you will see the ‘Upcoming Payments’ information which includes the chosen health plan with the balance and due date
4. To make a one-time payment, click ‘Make a Payment’

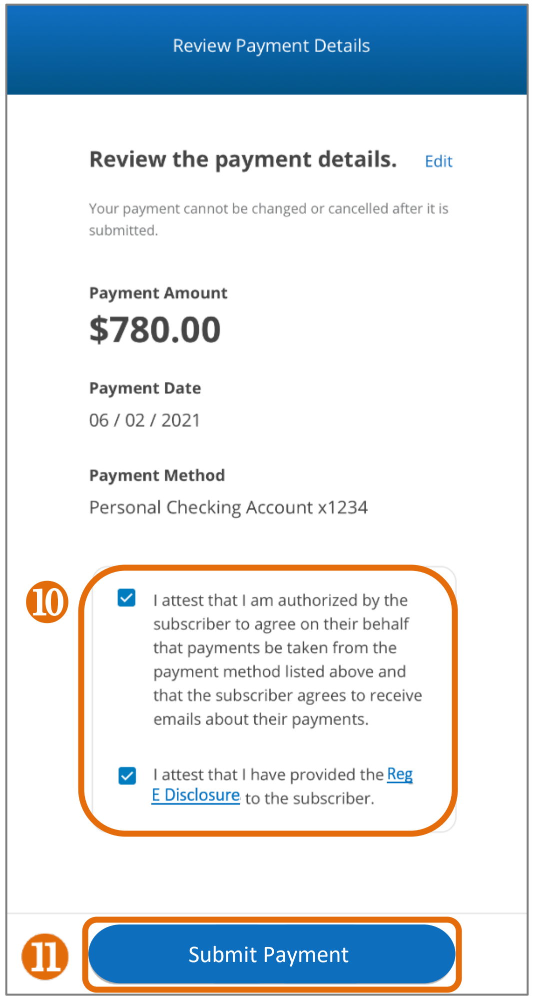
Note: Producers – To edit or turn off Auto Bill Pay for your client, you must call Producer Services and talk to a representative. FYI: Displayed Member Services and Producer Services phone numbers are state specific

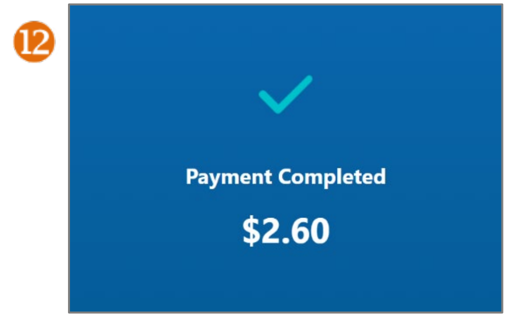


5. On the 'Payment Amount' section, you can choose 'Current Balance' or enter in 'Other amount'
6. Fill out the policy holder's personal information
7. Enter in the bank account information and select 'Checking' or 'Savings' account
8. Select 'Personal' or 'Business' account
9. Once complete, click 'Review Payment Details'
10. Payment Details summary will show, (click 'Edit' if needed) review and check off attestations
11. Select 'Submit Payment'
12. Payment is now completed

Note: A confirmation email will be sent to the subscriber's email address after payment is submitted

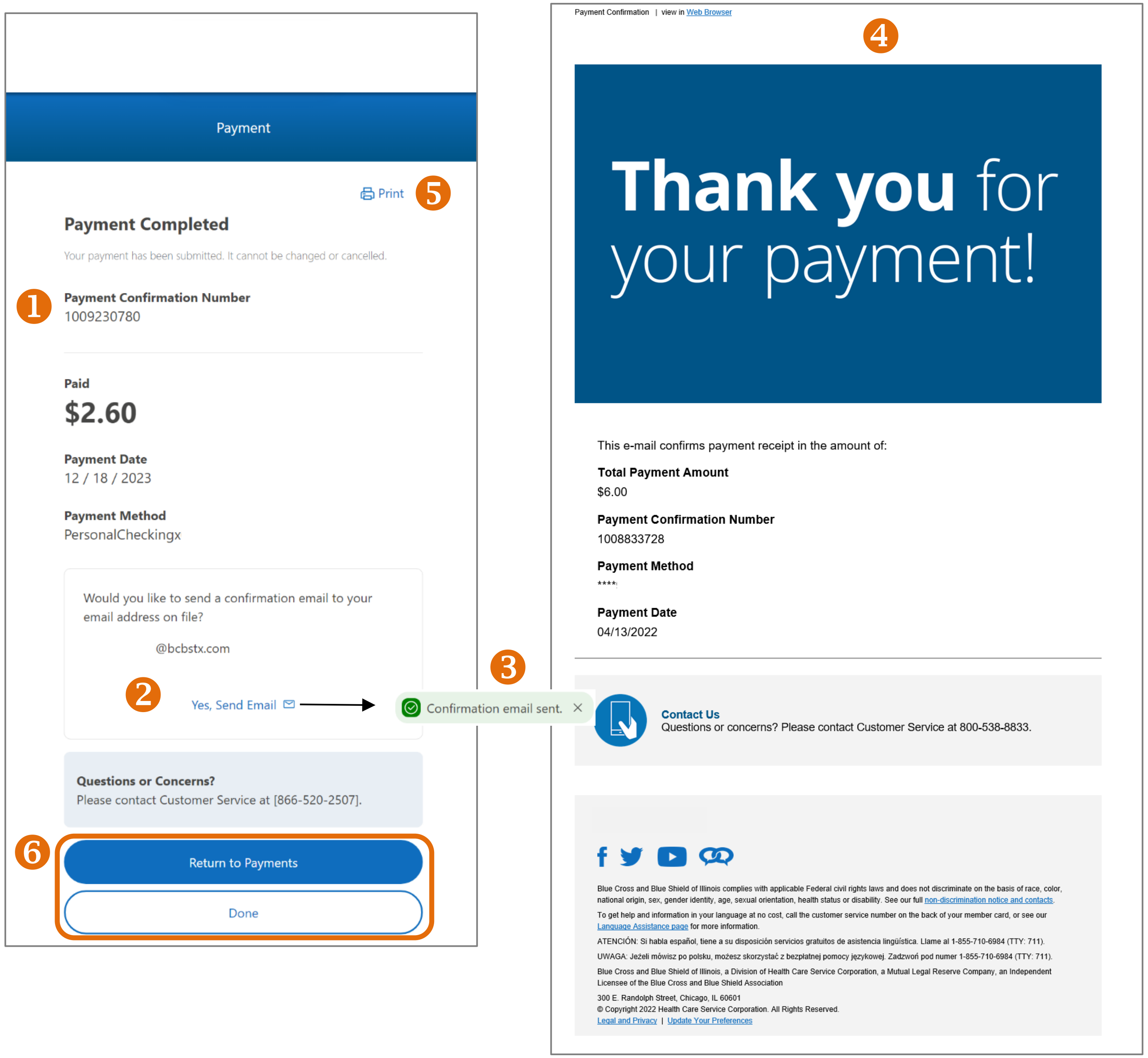






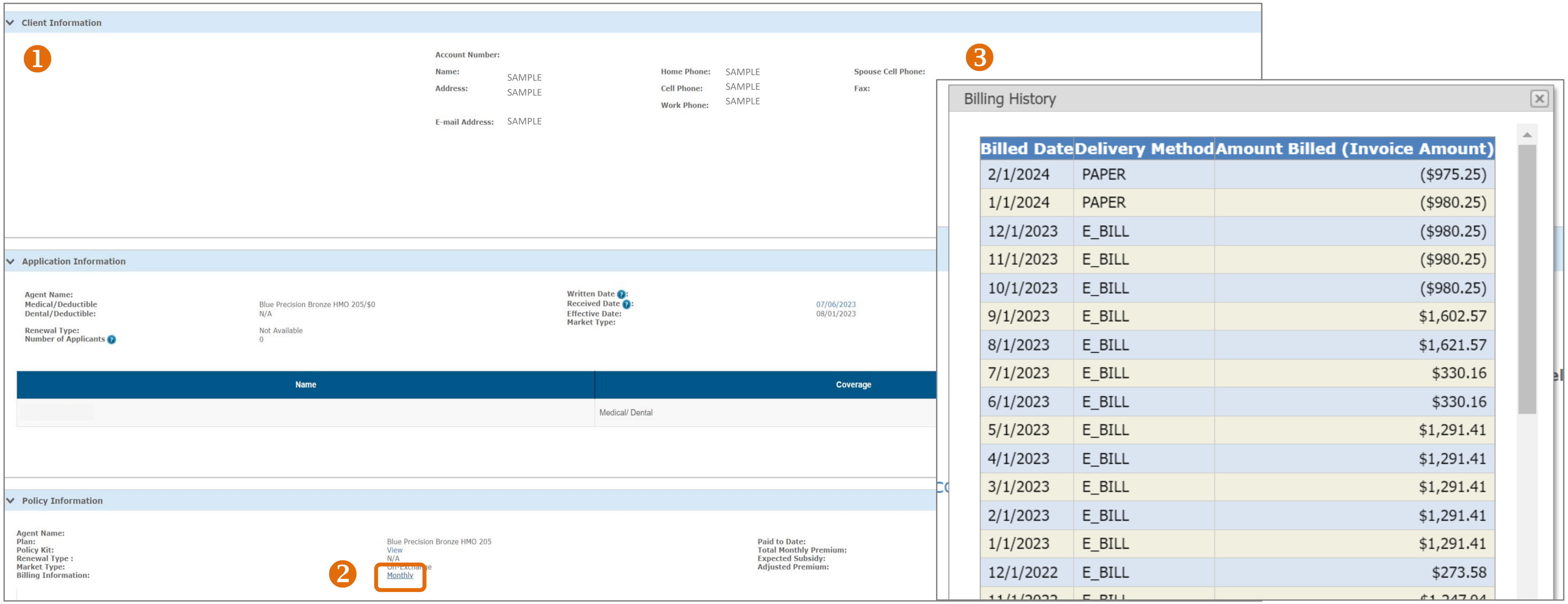
Payment Summary

1. **Payment Completed.** Please take note of the confirmation number for your records
2. You can choose to send yourself a confirmation email
3. When you click 'Yes, Send Email' a green confirmation message will appear
4. Sample email sent to the agent
5. You can "Print" the confirmation or save as a PDF
6. You can click 'Return to Payments' to make another payment, or select 'Done'



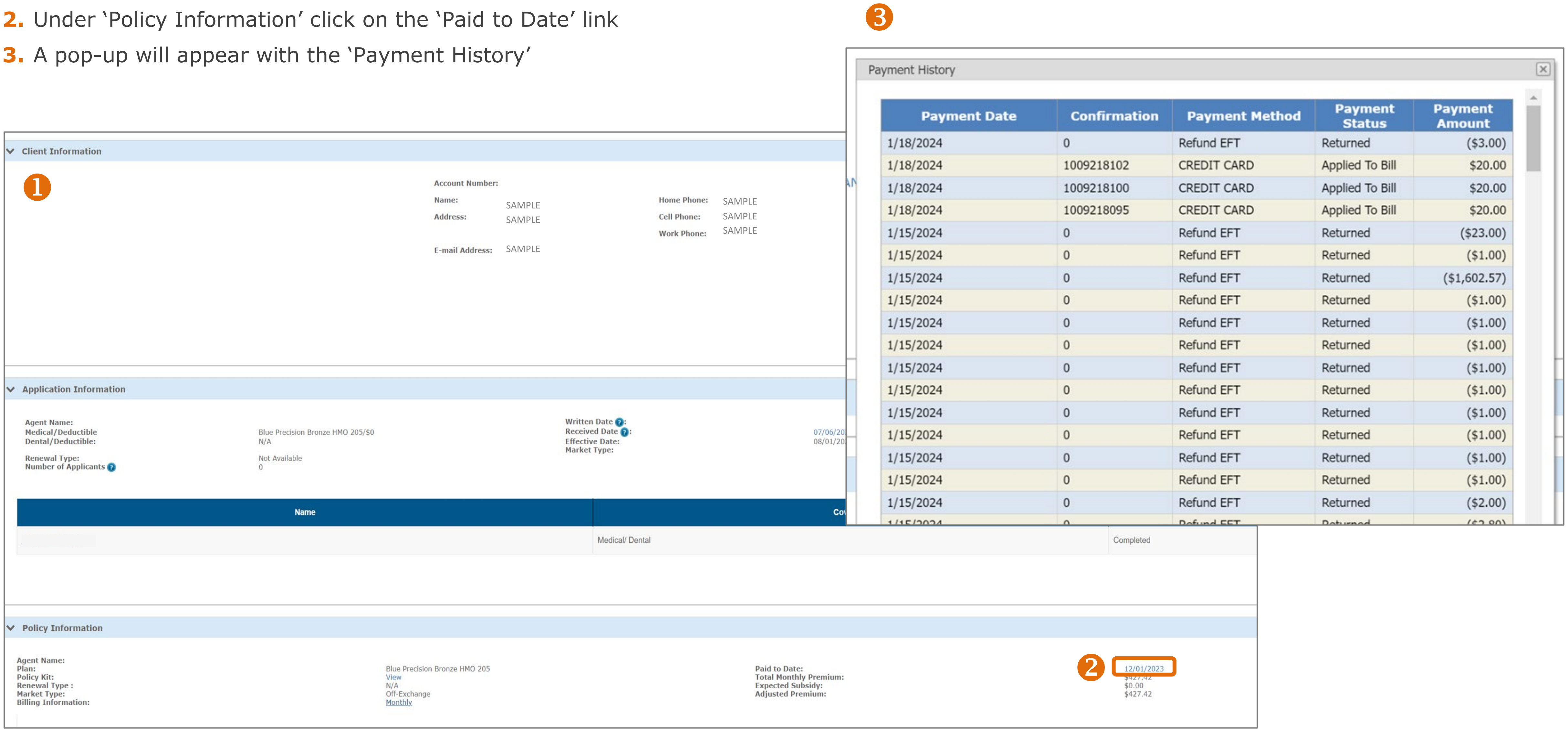
View Billing History

1. On the **Retail Producer Portal**, pull up your retail client's information
2. Under 'Policy Information' click on the 'Billing Information' link
3. A pop-up will appear with the 'Billing History'



View Payment History

1. On the **Retail Producer Portal**, pull up your retail client's information
2. Under 'Policy Information' click on the 'Paid to Date' link
3. A pop-up will appear with the 'Payment History'



Payment Date	Confirmation	Payment Method	Payment Status	Payment Amount
1/18/2024	0	Refund EFT	Returned	($3.00)
1/18/2024	1009218102	CREDIT CARD	Applied To Bill	$20.00
1/18/2024	1009218100	CREDIT CARD	Applied To Bill	$20.00
1/18/2024	1009218095	CREDIT CARD	Applied To Bill	$20.00
1/15/2024	0	Refund EFT	Returned	($23.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1,602.57)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($1.00)
1/15/2024	0	Refund EFT	Returned	($2.00)

Binder Payments

A binder payment is the initial payment your client needs to make when buying a health plan. This payment covers their first month's premium and must be paid within 30 days of enrolling in the plan. If they don't make this payment, their policy will not take effect (effectuate) which means they won't have health care coverage even though they signed up for it. **You cannot make Binder payments on behalf of your client.**

Making a Binder Payment

Member Payment Portal

1. On the 'Home' page of the Blue Cross and Blue Shield website, select 'Make a Payment' and then 'Pay My Bill'
2. On the 'Pay My Bill' page, click "First-Time Payment"
3. Fill out the policy holder's information and accept 'Terms of Use'
4. Fill out payment details and submit binder payment