

Managing Delegates in Blue Access for ProducersSM

We designed Blue Access for Producers (BAPSM) for all our producers as well as their administrative staff. Producers register for and log in to BAP with the 9-digit ID number we issue to them after they complete onboarding. For clarity purposes, we'll call them "primary" users. Primary users can then give BAP access to delegates. A delegate may be assigned specific access based on their role.

"Primary" Users versus Delegates in BAP

Questions	"Primary" Users	Delegates
User types?	If we issued a producer a 9-digit producer ID number, that producer can and should register for BAP. This is true for all licensed producer types authorized to sell our products: <ul style="list-style-type: none">• General Agents and Marketing Organizations• Agencies• Independent Producers• Subproducers (Those that sell over-65 and retail ACA policies may need to log in to BAP with their own ID number for us to track their regulatory compliance.)	Delegates can be other producers, accounting personnel, admin support and more. Here are some examples: <ul style="list-style-type: none">• A general agent (or any producer type) can add accounting personnel as delegates and assign them commission statement access.• An agency can add subproducers as delegates for quoting and enrolling employer groups or accessing small group renewal exhibits.• A subproducer who has a sales role can add an account management colleague as a delegate to manage groups post-sale.
User names?	The producer's own 9-digit ID number	The producer's 9-digit number followed by a dot [.] and additional characters (for example, 123456789.Mary)
Grant access?	Primary users can give BAP access to delegates.	Delegates can't grant BAP access to others.

Producers with multiple user names/logins

We recommend all producers, including subproducers, have their own primary user login. **The contact information from a primary user's profile directly updates the producer's contact information in our producer database.**

A producer can have multiple BAP user names/logins. Here are a couple of scenarios:

- **One primary user name and one delegate:** A subproducer could be a primary user to manage their own profile and a delegate under their agency's primary user name/account.
- **Five primary user names:** A multistate producer could be a primary user in every state in which we operate.

Adding Delegates

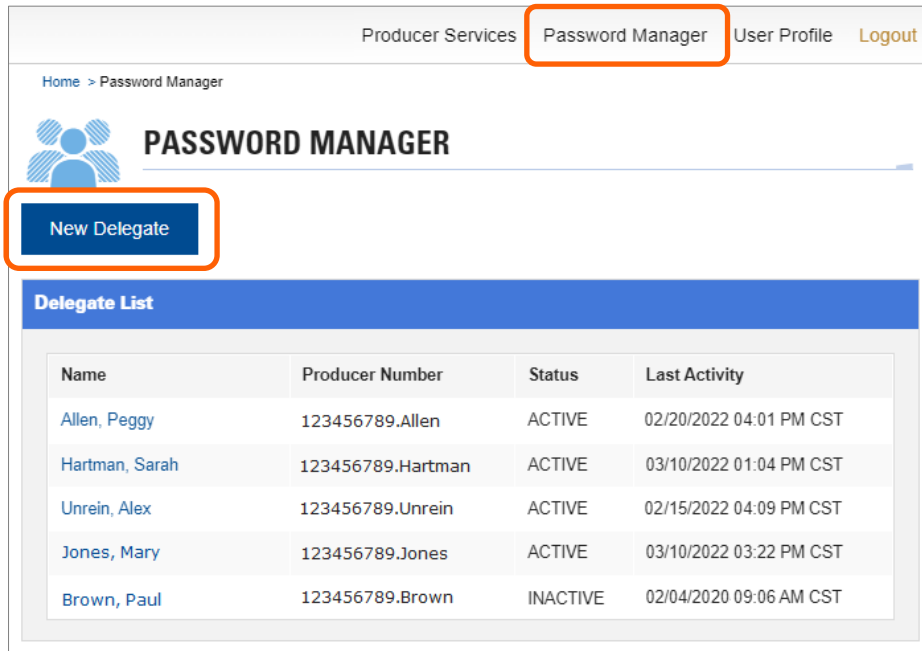
To add a delegate, click on Password Manager and then New Delegate (see image below).

Enter a User Name. A delegate's User Name must begin with the producer's 9-digit ID number followed by a dot [.] and additional characters (for example, 123456789.Mary).

Enter the First Name and Last Name, the phone number and email address of your delegate. The phone number or email address *should be unique as well as accessible to the delegate* when they go through the multifactor authentication process as they log in to BAP.

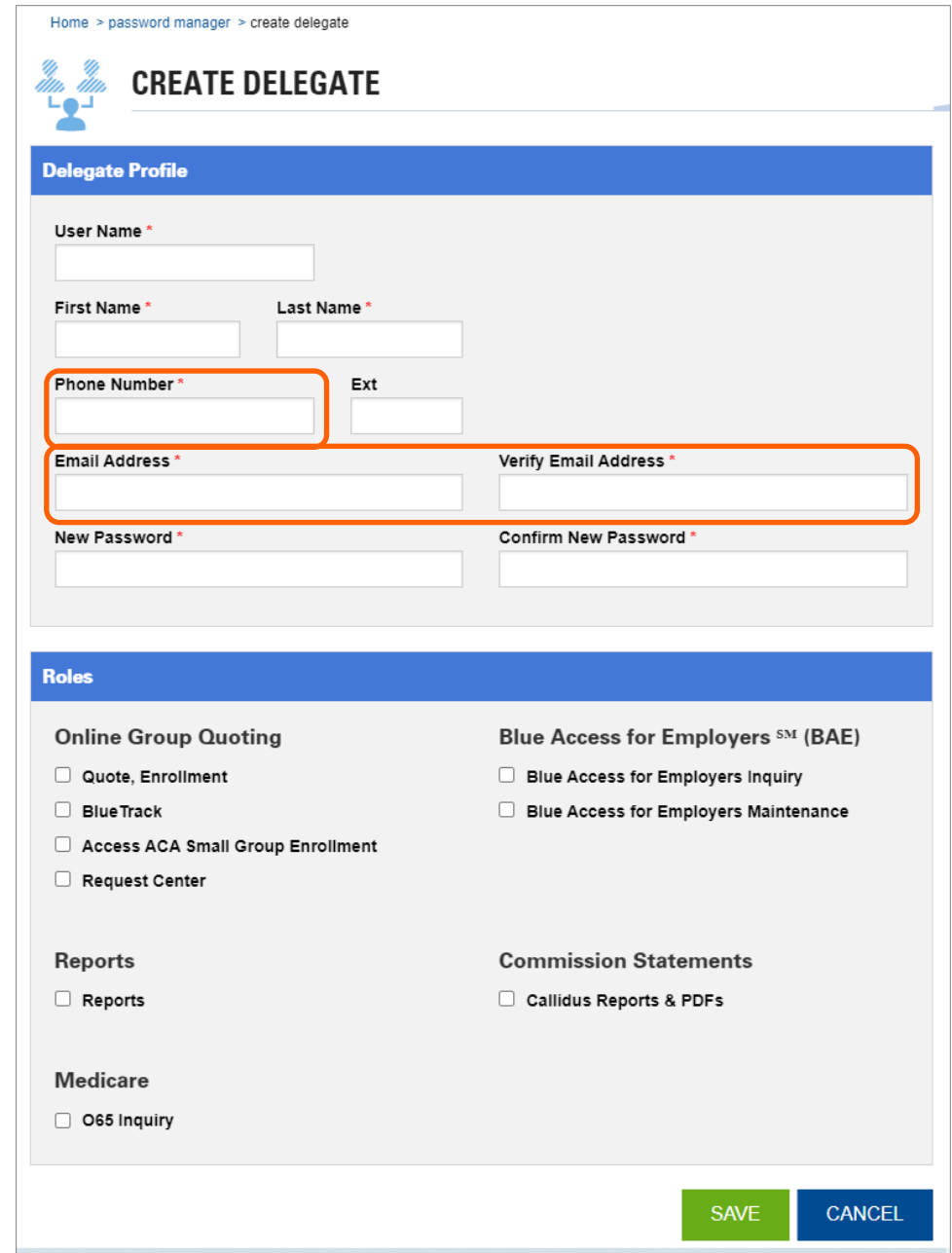
Create a temporary password for your delegate. When a new delegate first logs in to BAP, they create their own.

Assign Roles and click Save.



The screenshot shows the 'PASSWORD MANAGER' interface. At the top, there are navigation links: 'Producer Services', 'Password Manager' (highlighted with an orange box), 'User Profile', and 'Logout'. Below the navigation is a breadcrumb trail: 'Home > Password Manager'. The main heading is 'PASSWORD MANAGER' with a user icon. A 'New Delegate' button is highlighted with an orange box. Below this is a 'Delegate List' table.

Name	Producer Number	Status	Last Activity
Allen, Peggy	123456789.Allen	ACTIVE	02/20/2022 04:01 PM CST
Hartman, Sarah	123456789.Hartman	ACTIVE	03/10/2022 01:04 PM CST
Unrein, Alex	123456789.Unrein	ACTIVE	02/15/2022 04:09 PM CST
Jones, Mary	123456789.Jones	ACTIVE	03/10/2022 03:22 PM CST
Brown, Paul	123456789.Brown	INACTIVE	02/04/2020 09:06 AM CST



The screenshot shows the 'CREATE DELEGATE' form. At the top, there is a breadcrumb trail: 'Home > password manager > create delegate'. The main heading is 'CREATE DELEGATE' with a user icon. Below this is a 'Delegate Profile' section with the following fields:

- User Name *
- First Name *
- Last Name *
- Phone Number * (highlighted with an orange box)
- Ext
- Email Address * (highlighted with an orange box)
- Verify Email Address * (highlighted with an orange box)
- New Password *
- Confirm New Password *

Below the 'Delegate Profile' section is a 'Roles' section with the following options:

- Online Group Quoting
 - Quote, Enrollment
 - BlueTrack
 - Access ACA Small Group Enrollment
 - Request Center
- Blue Access for EmployersSM (BAE)
 - Blue Access for Employers Inquiry
 - Blue Access for Employers Maintenance
- Reports
 - Reports
- Commission Statements
 - Callidus Reports & PDFs
- Medicare
 - O65 Inquiry

At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

Initial Login for Delegates

The first time the delegate logs in to BAP with the User Name and Password created by the primary user, they step through an initial login process.

A delegate needs to read the Terms & Conditions and agree to them.

The delegate then chooses a Security Question, types in an answer and clicks Submit.

The delegate must create a new password, re-type it and click Save.

After these steps, the delegate logs into BAP with their new password.

Initial Login

TERMS & CONDITIONS SECURITY QUESTION UPDATE PASSWORD CONFIRMATION

Terms & Conditions

Please accept the following terms and conditions

Before You Begin

You, as a Producer ("Producer") or as a Producer authorized by your Employer, Company and/or Agency (hereinafter "Agency") authorized by your firm ("Firm") want to get started using Blue

Initial Login

TERMS & CONDITIONS SECURITY QUESTION UPDATE PASSWORD CONFIRMATION

Please select and answer a security question *

What is your favorite movie?

Enter your response: *

Jaws

Submit

Initial Login

TERMS & CONDITIONS SECURITY QUESTION UPDATE PASSWORD CONFIRMATION

Please specify your new password. View Password Guidelines

New password: *

Re-type new password: *

SAVE

Initial Login

TERMS & CONDITIONS SECURITY QUESTION UPDATE PASSWORD CONFIRMATION

CONFIRMATION

Your security question and password have been updated. Click the button below to return to the login page and login with your new credentials.

Back to Login

Reviewing Delegate Profiles

BAP users who manage delegates should review those profiles often. Through Password Manager, you can:

- Add a new delegate
- Revoke BAP access for a delegate
- Re-activate a delegate whose access was revoked
- Change a delegate's role(s)
- Update a delegate's contact information

Producer Services Password Manager

Home > password manager > edit delegate

EDIT DELEGATE

Delegate Profile

User Name
123456789.Hartman

First Name * Sarah Last Name * Hartman

Phone Number * (123) 123-1234 Ext xxxx

Email Address * sarah@MyAgency.com

New Password New Password Confirm New Password Confirm New Password

Roles

Online Group Quoting

- Quote, Enrollment
- BlueTrack
- Access ACA Small Group Enrollment
- Request Center

Blue Access for Employers SM (BAE)

- Blue Access for Employers Inquiry
- Blue Access for Employers Maintenance

Reports

- Reports

Commission Statements

- Callidus Reports & PDFs

Medicare

- O65 Inquiry

SAVE REVOKE ACCESS CANCEL

Producer Services Password Manager User Profile Logout

Home > Password Manager

PASSWORD MANAGER

New Delegate

Delegate List

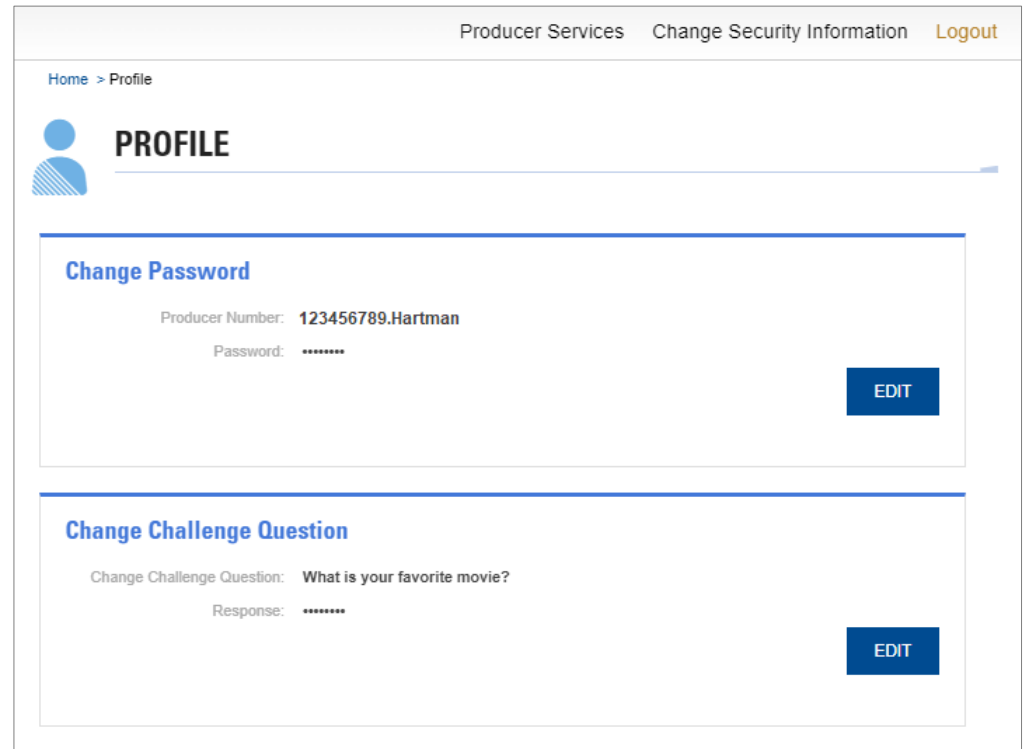
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Verifying Delegate Contact Information

Delegates can't edit or even view their contact information to see if it's out of date. *Only a primary user can view and edit a delegate's Phone Number and Email Address.* At right is an image of the profile information a delegate can see and edit: their own password and security question.

Regarding their contact information, check in with your delegates:

- Make sure they know the contact information you submitted for them.
- Confirm that it's up to date.
- Make sure they can access their email or phone during BAP logins to retrieve the one-time passcode needed for multifactor authentication.
- Ask if they plan to receive one-time passcodes via SMS text and if they do, confirm the phone number you entered in their profile accepts text messages.



The screenshot shows a user profile page with the following elements:

- Page Header:** "Producer Services", "Change Security Information", and "Logout".
- Breadcrumbs:** "Home > Profile".
- Profile Section:** A blue circle icon followed by the word "PROFILE".
- Change Password Section:**
 - Label: "Change Password"
 - Producer Number: "123456789.Hartman"
 - Password: "*****"
 - Button: "EDIT"
- Change Challenge Question Section:**
 - Label: "Change Challenge Question"
 - Change Challenge Question: "What is your favorite movie?"
 - Response: "*****"
 - Button: "EDIT"