

Managing Delegates in Blue Access for ProducersSM

We designed Blue Access for Producers (BAPSM) for producers and their administrative staff. Producers register for, and log into BAP with the 9-digit ID number we issue after onboarding. For clarity purposes, we call them “Primary” BAP accounts. Primary users can then give BAP access to Delegates and assign them roles. This allows a team to service clients in BAP while each person has their own unique User ID, password and email address.

Primary BAP Accounts versus Delegate BAP Accounts

	Primary BAP Accounts	Delegate BAP Accounts
Who are they?	<p>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:</p> <ul style="list-style-type: none"> • General Agents (GAs) and Marketing Organizations • Agencies • Independent Producers • Subproducers (Those selling over-65 and retail ACA policies may need Primary BAP accounts in order for us to track regulatory compliance.) 	<p>Delegates can be other producers, accounting personnel, admin support and more. Here are some examples:</p> <ul style="list-style-type: none"> • A GA (or any producer type) with a Primary BAP account adds an accountant as a Delegate and assigns them commission statement access. • An agency with a Primary BAP account adds subproducers as Delegates and gives them group quoting access. • A subproducer in sales with a Primary BAP account adds an account management colleague as a Delegate to manage groups post-sale.
What’s their User ID?	The producer’s own 9-digit ID number	The Primary producer’s 9-digit number followed by a dot [.] and additional characters (for example, 123456789.Mary)
Can they give access to others?	Yes, primary users can give BAP access to delegates.	No, delegates can’t grant BAP access to others.

Producers with multiple Producer ID Numbers and BAP User IDs

We recommend all producers, including subproducers, have their own Primary BAP account. The contact information from a Primary BAP account profile directly updates the producer’s contact information in our producer database.

A producer can have multiple BAP accounts. Here are some scenarios:

- **One primary BAP User ID and one delegate:** A subproducer is a primary BAP user to manage their own profile and is a delegate under their agency’s primary BAP User ID/account.
- **Five primary BAP User IDs:** A multistate producer has five BAP User IDs (one for each state in which we operate).

Adding Delegates

To add a delegate, click on Password Manager and then New Delegate (see image below). Go through the following fields:

1. Enter a User ID. A Delegate's User ID will begin with your 9-digit Producer ID number followed by a dot [.]. You add the additional characters (for example, 123456789.Mary).
2. Enter the First Name and Last Name of your Delegate
3. Add a Phone Number.
4. The Mobile Number is optional. If the Delegate wants to verify their identity via SMS text messaging, they must save a Mobile Number.
5. Check the text messaging permission box.
6. Add the Email Address of your delegate. The email address is required. This address should belong to your Delegate.
7. Create a temporary password for your Delegate. When a new Delegate first logs in to BAP, they create their own password.
8. Assign Roles and click Save. For more on assigning roles, see page 3.

Producer Services **Password Manager** User Profile Logout

Home > Password Manager

PASSWORD MANAGER

New Delegate

Delegate List

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

CREATE DELEGATE

Delegate Profile

User Name *
88888908.User Name

First Name * First Name **Last Name *** Last Name

Phone Number *
xxx-xxx-xxxx

Mobile Number
xxx-xxx-xxxx

By saving a phone number for text messages, you are agreeing to receive recurring messages from BCBSIL. Message and data rates may apply. For more information, you can view our Terms of Use and Privacy Statement.

Email Address * email@domain.com **Verify Email Address *** email@domain.com

New Password * New Password **Confirm New Password *** Confirm New Password

Roles

Online Group Quoting

- Quote, Enrollment
- BlueTrack
- Request Center

Blue Access for Employers SM (BAE)

- Inquiry and Group Secure Messaging
- Maintenance and Group Secure Messaging
- Group Secure Messaging

Reports

- Reports

Commission Statements

- Callidus Reports & PDFs

Medicare

- O65 Inquiry

SAVE **CANCEL**

Assigning Roles

Below are the different roles Primary BAP account users can assign to their Delegates.

Online Group Quoting

Quote, Enrollment

Assign this role to allow a Delegate access to eSales functions:

- Quote and enroll group business.
- Track the progress of applications.
- See plan benefits and rates.
- Review renewal packages.
- View Management Reports (Texas only).

BlueTrack

Assign this role to allow a Delegate to only track the progress of group applications.

Request Center

This role allows Delegates to attach, submit and track small group paperwork changes in real time. These include:

- Plan changes
- Group contact, address, and anniversary date changes
- Regulatory data updates (i.e., Medicare Secondary Payer)

Reports

This role is available for Illinois Delegates only and grants access to Blue Insight Reports for group accounts.

Medicare

O65 Inquiry

This role allows Delegates to access MAPD, PDP and Medicare Supplement information via BAP. Delegates can view Incomplete Applications, Submitted Applications and Membership information. Delegates do not have access to complete or submit applications. They can only view which apps require action.

Roles	
Online Group Quoting <ul style="list-style-type: none"><input type="checkbox"/> Quote, Enrollment<input type="checkbox"/> BlueTrack<input type="checkbox"/> Request Center	Blue Access for Employers SM (BAE) <ul style="list-style-type: none"><input type="checkbox"/> Inquiry and Group Secure Messaging<input type="checkbox"/> Maintenance and Group Secure Messaging<input type="checkbox"/> Group Secure Messaging
Reports <ul style="list-style-type: none"><input type="checkbox"/> Reports	Commission Statements <ul style="list-style-type: none"><input type="checkbox"/> Callidus Reports & PDFs
Medicare <ul style="list-style-type: none"><input type="checkbox"/> O65 Inquiry	

Blue Access for EmployersSM (BAE)

Inquiry and Group Secure Messaging

This role allows Delegates to access BAE inquiry functions and the Membership Message Center.

The Membership Message Center improves and streamlines membership-related communications and protects those communications with added security for sending inquiries and preventing unauthorized access.

Maintenance and Group Secure Messaging

This role allows Delegates to access BAE maintenance functions and the Membership Message Center.

Group Secure Messaging

This role allows Delegates to access the Membership Message Center.

Commission Statements

Callidus Reports and PDFs

Access to the Callidus Portal to view, access and download commissions data, reports and PDFs.

Email Confirmation

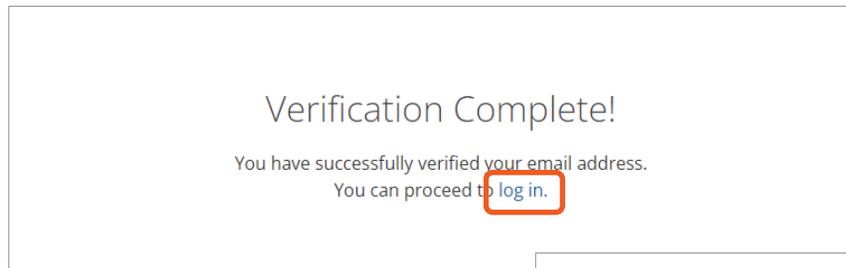
As soon as you successfully add your delegates, they will receive a welcome email asking for email address confirmation.

After the delegate clicks on “Confirm Your Email Address” link, they will see a “Verification Complete!” message with a link to log in to BAP.

Delegates can click on the “Producer Log In or Sign Up” link at the top of the page to complete the registration process.

Delegates must have the User ID and temporary Password the Primary BAP account user created to complete the registration process.

If your Delegates fail to confirm/verify their email address, we will send them a new confirmation email the first time they try to log in to BAP.

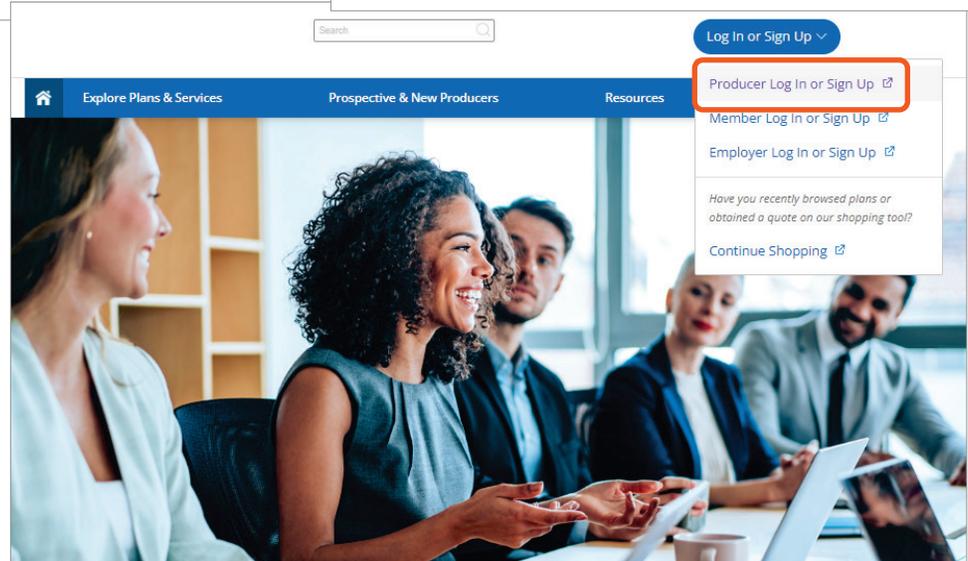
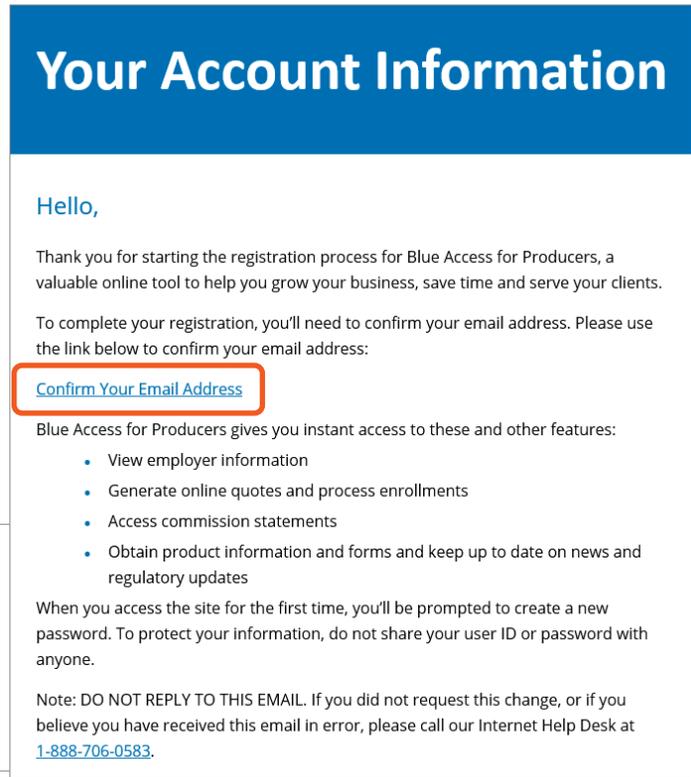


Initial Login for Delegates

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

- Agrees to Terms & Conditions
- Chooses a Security Question and answer
- Created a new password

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



Reviewing Delegate Profiles

Primary BAP account 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)

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PASSWORD MANAGER

New Delegate

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Roles

Online Group Quoting <ul style="list-style-type: none"><input checked="" type="checkbox"/> Quote, Enrollment<input checked="" type="checkbox"/> BlueTrack<input checked="" type="checkbox"/> Request Center	Blue Access for Employers SM (BAE) <ul style="list-style-type: none"><input checked="" type="radio"/> Inquiry and Group Secure Messaging<input type="radio"/> Maintenance and Group Secure Messaging<input type="radio"/> Group Secure Messaging
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Medicare <ul style="list-style-type: none"><input checked="" type="checkbox"/> O65 Inquiry	

SAVE REVOKE ACCESS CANCEL

Delegate Contact Information

Delegates can now view and edit their contact information if it's out of date. On a regular basis, ask your delegates to:

- Review their contact information.
- Confirm that it's up-to-date.
- Make sure they can access their email during BAP logins to retrieve the one-time passcode needed for two-step login.
- Add/Review their Mobile Number if they want to receive via text message the one-time passcode needed for two-step login.

Technical Support

Here's how to contact our Help Desk for Blue Access for Producers and Employers. The Help Desk must verify the user calling before they can assist you. They use the contact information in your BAP User Profile to verify you. If calling on behalf of an agency, the caller must be the agency-designated Principal.

Internet Help Desk:

888-706-0583

Monday – Friday: 7:00 a.m. – 10:00 p.m. CT

Saturday: 7:00 a.m. – 3:30 p.m. CT

The screenshot displays a user profile interface. At the top right, there are navigation links for 'Producer Services', 'User Profile', and 'Logout'. The main content area is divided into two columns. The left column features a blue sidebar with the following elements: a welcome message 'Welcome, MARY JONES', company information 'Company: ABC AGENCY' and 'Producer #: 123456789', a 'Request Assistance' button with an information icon, a section for 'Existing Request Tickets' with a list of three items, a 'Change Security Information' button with a person icon, and a 'Technical Help Desk' section with the phone number '1-888-706-0583' and operating hours: 'Mon-Fri 7 a.m. - 10 p.m. (CT)' and 'Sat 7 a.m. - 3:30 p.m. (CT)'. The right column shows the user's profile, starting with 'Home > Profile' and a 'PROFILE' header. Below this is a 'Change Contact Information' section with fields for Name (JOHN ROBINSON), Phone ((123) 123-1234), Mobile, and Email (john_robinson@abcagency.com), followed by an 'EDIT' button. The bottom section is 'Change Password', showing the Producer Number (123456789.JohnRobinson) and a Password field with masked characters, also followed by an 'EDIT' button.

In this example above, John Robinson is a Delegate for Mary Jones at ABC Agency. Mary's Producer ID Number and BAP User ID is **123456789**. John's Producer ID Number and his BAP User ID is **123456789.JohnRobinson**.

John can edit his phone number, add his mobile number, change his email address, and change his password. John **CAN'T** change his name, his Producer ID Number or any information about the Primary BAP account holder, Mary Jones. He also can't change his assigned roles.