



BlueCross. BlueShield.
Illinois • Montana • New Mexico
Oklahoma • Texas

Commission Statements User Manual

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INTRODUCTION

Your Blue Cross and Blue Shield plan has provided this guide to describe the main features of the **SAP SALES CLOUD** Commission Reporting tool

The **SAP SALES CLOUD** Commission Reporting Tool is a Cloud based Sales and Performance platform that is going to allows users to more efficiently view, print and download detail or summary versions of their monthly commission statements for group and individual business.

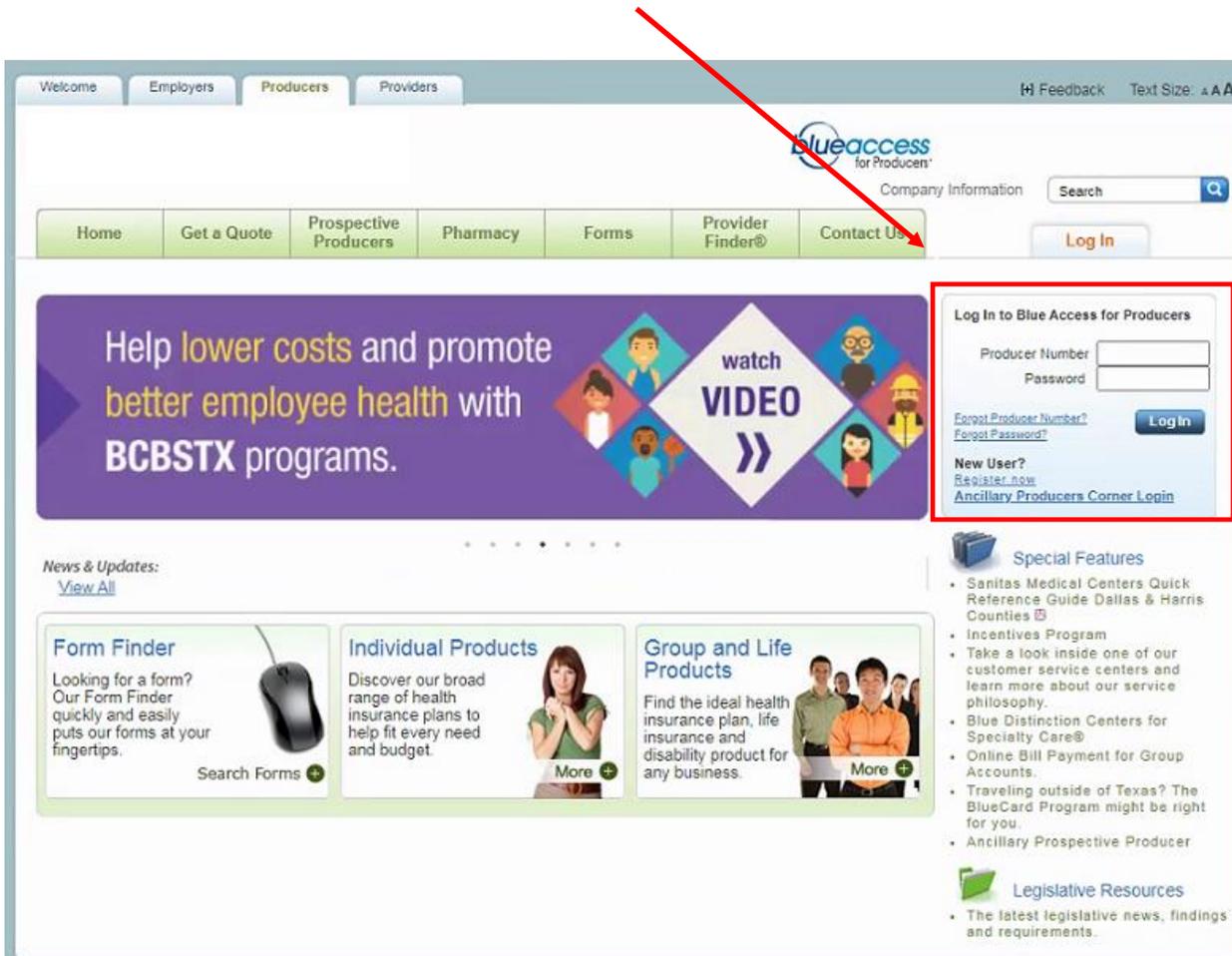
ACCESSING BLUE ACCESS FOR PRODUCERS "PORTAL"

To access commission statements:

Producer accesses the BlueCross BlueShield website for their contracted state.
(BCBSIL.com, BCBSTX.com, BCBSOK.com, BCBSNM.com, and BCBSMT.com)

Once user has accessed the webpage, click the Producer Tab. User will be directed to the page below, and can access Blue Access for Producers.

1. Login into Blue Access for Producers



The screenshot shows the Blue Access for Producers website interface. At the top, there are navigation tabs for 'Welcome', 'Employers', 'Producers', and 'Providers'. The 'Producers' tab is selected. A red arrow points to the 'Producers' tab. Below the navigation, there is a search bar and a 'Log In' button. The main content area features a large purple banner with the text 'Help lower costs and promote better employee health with BCBSTX programs.' and a 'watch VIDEO' button. To the right of the banner is a login form titled 'Log In to Blue Access for Producers'. The form includes fields for 'Producer Number' and 'Password', a 'Log In' button, and links for 'Forgot Producer Number?', 'Forgot Password?', 'New User? Register now', and 'Ancillary Producers Corner Login'. Below the banner, there are sections for 'News & Updates' and 'Special Features'. The 'Form Finder' section includes a search bar and a 'Search Forms' button. The 'Individual Products' and 'Group and Life Products' sections provide information about health insurance plans and products. The 'Special Features' section lists various services and programs available to producers.

Enter Producer Number (Nine-digit producer number assigned by BCBS)

Enter Password (The selected permanent password created at registration)

If you have not recently accessed your account, have forgotten your password or any BAP issue please contact our **Internet Help Desk toll free at (888) 706-0583** for assistance.

ACCESSING THE SAP SALES CLOUD COMMISSION STATEMENTS

After logging in to Blue Access for Producers, the page defaults to Commissions. On this screen there are two options to access the reports.

- A) "Interactive Commission Reporting Tool" which will take you to the exportable commission statements
- B) Monthly Links which open PDF's

The screenshot shows the Blue Access for Producers interface. At the top left is the logo. The top right has navigation links: [Producer Services](#), [Password Manager](#), [User Profile](#), and [Logout](#). The main header area says "Welcome, PORTAL" and lists user details: Company: PORTAL DEMO, Producer #: 000ldemo, License Renewal: 01/01/2050. Below this is a sidebar with icons for "COMMISSIONS", "GROUP", "INDIVIDUAL", and "MEDICARE". The "COMMISSIONS" icon is highlighted. The main content area is titled "COMMISSIONS" and contains a table of commission statements. A red box labeled "A" highlights the "INTERACTIVE COMMISSION REPORTING TOOL" link. Another red box labeled "B" highlights the "November 2020 HCSC Commission Statement" link. The table lists statements for November 2020, October 2020, September 2020, August 2020, July 2020, June 2020, May 2020, April 2020, March 2020, February 2020, January 2020, and December 2019. To the right is a sidebar titled "PDFs & RELATED INFORMATION" with a list of links: > CURRENT VERSION Enterprise Producer Agreement, > Consumer Markets Compensation Schedule, > Group Markets Compensation Schedule, > Quick Reference Guide, > NEW Supplemental Health Compensation Schedule, > Med Supp Commission Schedule.

Once the **Interactive Commission Reporting Tool** link has been selected, you are re-directed to the **SAP Sales Cloud** Custom Reports screen.

The screenshot shows the SAP Sales Cloud interface for the 'Reports' section. The browser address bar indicates the URL: `hscs-prd.callidusondemand.com/SalesPortal/#!/reports`. The page header includes the SAP logo and 'Sales Cloud'. The main content area is titled 'Reports' and features a search bar and a dropdown menu set to 'Show all'. Below this is a table of 'Custom Reports' with columns for 'Name', 'Report Type', and 'Date Published'. The table lists 11 reports, each with a green status icon. A message on the right states 'No report selected. Select a report from the list to view it.' At the bottom, there is a pagination control showing page 1 of 11.

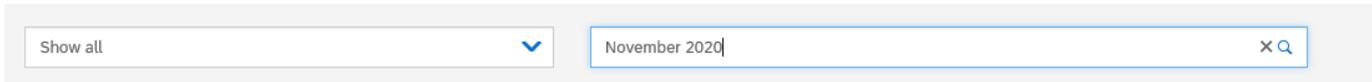
Name	Report Type	Date Published
TX_Detail Commission Statement EXT November 2020		Dec 16, 2020 4:48:33 AM
Commission_Summary_Statement EXT November 2020		Dec 16, 2020 4:21:28 AM
Individual_Extract Producer_Commission EXT November 2020		Dec 16, 2020 4:21:13 AM
Group_Extract Producer Commission EXT November 2020		Dec 16, 2020 4:19:34 AM
TX_Detail Commission Statement EXT October 2020		Nov 18, 2020 1:56:53 AM
Group_Extract Producer Commission EXT October 2020		Nov 18, 2020 1:30:32 AM
Individual_Extract Producer_Commission EXT October 2020		Nov 18, 2020 1:29:35 AM
Commission_Summary_Statement EXT October 2020		Nov 18, 2020 1:28:53 AM
TX_Detail Commission Statement EXT September 2020		Oct 16, 2020 1:27:21 PM
Individual_Extract Producer_Commission EXT September 2020		Oct 16, 2020 12:56:58 PM

VIEWING A SAP SALES CLOUD REPORT

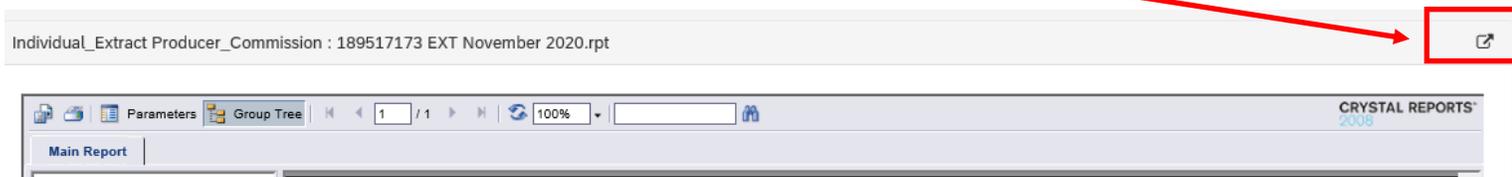
Under the **CUSTOM Reports** section, you will see all your commission statements listed, and they will be sorted according to when the report was generated. The most recent commission statement will be displayed at the top of the list.

Only Chrome is a compatible browser to view the reports. If any other browser is used, the reports may not be viewable.

There is a search option as well, to narrow down the commission statement list. For example, if you type in the words "November 2020" in the Search box, your November 2020 Reports will only be listed.



To view a commission report, click on the commission report file name and it will open up to the right in your session. **To expand the screen, select**



EXPORTING / PRINTING

Only PDF and Excel options are the correct formats for exporting



The statement can be printed by selecting the "Print" icon

SEARCHING WITH THE REPORT

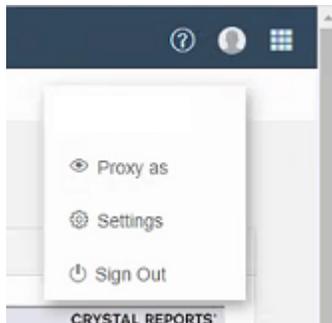


If looking for a policy or group, the ability exists to search within the entire statement by using the search field at the top:

In addition, on the left side pane, there is a tree level structure, which the user can click on and the statement opens on that page.

SIGN OUT

Once finished viewing the statements, click the **Sign Out** option or close the window. The window will then display a log in page. **Do not attempt to log in via this page, as it will not work.** Users can re-enter the tool only by clicking the link on BlueAccess for Producer, which remains active unless the session has been closed due to inactivity.



Delegated Users with commission statement access can also view, print or download a PDF statement via the link on BlueAccess for Producer. However, the **INTERACTIVE TOOL** link is not available for Delegated Users.

The format of **SAP Sales Cloud** is different from the PDF versions found on the Blue Access Commission Statement page, but the data is the same.

NOTE:

Producers with business in multiple HCSC Blue's Plan states will receive a statement for each state by logging into each state specific BlueAccess for Producer Portal.

Please see the related topic in **Frequently Asked Questions**.

COMMISSION DETAIL STATEMENT

The Detail Statement has four sections:

- Commissions
- Overrides (If applicable)
- Bonus (If applicable)
- Cancellations

Account/ Policy Number	Group Number	Group/ Policy Name	Original Eff Date	Producer Eff Date	Cancel Date
A	B	C	D	E	F

* indicates commissions rolled to another producer.

Commissions

Producer/Sub-Producer: DEMO PR.-PR- DEMO

Individual

Retention

Source ID:

08900	07P26	SampleGroupName	1/1/2005	1/1/2005
08900	53P24	SampleGroupName	4/1/2005	4/1/2005
08901	07P26	SampleGroupName	10/17/2005	10/17/2005
08901	07P26	SampleGroupName	10/17/2005	10/17/2005
08902	74P24	SampleGroupName	4/5/2002	4/5/2002
08902	07P26	SampleGroupName	6/28/2006	6/28/2006

The following table lists the detail report column names and descriptions.

	Column	Description
A	Account/Policy Number	Group – Account Number Individual – Policy Number
B	Group Number	Group number associated with the account or policy
C	Group/Policy Name	Name associated with the account or policy
D	Original Eff Date	<ul style="list-style-type: none"> • Groups: Original Effective Date • Individuals: <ul style="list-style-type: none"> • Health - Original Effective date • Dental - The effective date the individual added Dental
E	Producer Eff Date	The date the producer was assigned to the policy
F	Cancel Date	The date the group or individual was cancelled

Product Name G	Funding Type H	Calculation Method I	Number Of Contracts J	Split % K
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BlueEdge HSA	PREM	% Premium Flat		100.00%
Blue Value	PREM	% Premium Flat		100.00%
BlueEdge HSA	PREM	% Premium Flat		100.00%
BlueEdge HSA	PREM	% Premium Flat		100.00%
BlueChoice Sel	PREM	% Premium Flat		100.00%
BlueEdge HSA	PREM	% Premium Flat		100.00%

	Column	Description
G	Product Name	Short form of Product Name, such as HMO
H	Funding Type	Possible values are: ASO – Administrative Services Only; the group is self-funded PREM – Funded by Premiums COST – Cost Plus MPP – Minimum Premium
I	Calculation Method	Method used to calculate the commissions or overrides for the account or policy. Possible methods: <ul style="list-style-type: none"> • Zero Comm • \$/Contract • Flat Monthly • % Premium • % Stop Loss • % Paid Claims
J	Member/Contracts	Number of contracts for the account/policy number and product type (i.e., HMO, Dental, Non-HMO) Note: For individual business, will be blank for calculations paid on premium
K	Split %	The split % for this producer

Policy Mos	Paid From Date	Paid To Date	Compensated Premium	Override/Commission Rate	Override/Commission Amount
L	M	N	O	P	Q

Year to Date Compensated Premium	Year to Date Override/Commission	GA Name	Billing Mode
R	S	T	



86	2/1/2012	3/1/2012	\$362.46	7.0000%	\$25.37	\$724.92	\$50.74	GADEMO
Totals For 0890000001			\$362.46		\$25.37	\$724.92	\$50.74	
83	2/1/2012	3/1/2012	\$375.96	7.0000%	\$26.32	\$751.92	\$52.64	GADEMO
Totals For 0890000002			\$375.96		\$26.32	\$751.92	\$52.64	
77	2/17/2012	3/17/2012	\$248.72	7.0000%	\$17.41	\$497.44	\$34.82	GADEMO
79	4/17/2012	5/17/2012	\$248.72	7.0000%	\$17.41	\$746.16	\$52.23	GADEMO
Totals For 0890000003			\$497.44		\$34.82	\$746.16	\$52.23	
119	2/5/2012	3/5/2012	\$335.20	7.0000%	\$23.46	\$670.40	\$46.92	GADEMO
Totals For 0890000004			\$335.20		\$23.46	\$670.40	\$46.92	
69	2/28/2012	3/28/2012	\$168.02	7.0000%	\$11.76	\$336.04	\$23.52	GADEMO
Totals For 0890000005			\$168.02		\$11.76	\$336.04	\$23.52	

Column	Description
L	Policy Mos Number of Months this policy/account has been active
M	Paid From Date Premium Paid From date
N	Paid To Date Premium Paid To date
O	Compensated Premium Compensated Premium for the current statement
P	Override/ Commission Rate Commission Rate for Producers or Admin Fee/Override Rate for General Agents
Q	Override/Commission Amt Commission Amount for Producers or Admin Fee/Override Amount for General Agents
R	Year to Date Compensated Premium Year to Date Premium totals for the current payment year
S	Year to Date Commission Year to Date Commission totals for the current payment year
T	GA Name General Agent Number (if applicable)
	Billing Mode The frequency the member is billed Bill Mode values: 01 – Monthly 02 - Every other month 03 - Quarterly 05 – Semi Annual 06 – Annual *For Group no information will be displayed

HEADER SECTIONS OF COMMISSION DETAIL STATEMENT

Commissions/Admin Fee (Overrides)/ Bonus	The portion of the Commission Detail Statement that displays commissions and overrides or Bonus earned for the month.
Group/ Individual	Line of Business - Group or Individual
New Business Or Retention	Indication of whether business is new or existing based on Policy Year.
Producer/SubProducer/Rollup Producer	Number and name of producer who generated the credit. Grouping for the report for a producer or Rollup Producer. For a General Agent (Illinois and Texas only), the report will be grouped by Producer Number.

CANCELLATIONS

Cancellations

The portion of the Commission Detail Statement that displays all accounts/policies that terminated within the calendar year

Account/ Policy Number	Group Number	Group/ Policy Name	Original Eff Date	Producer Eff Date	Cancel Date	Product Name	Funding Type	Calculation Method	Number Of Contracts	Split %	Policy Mos Date	Paid From Date	Paid To Date
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* Indicates commissions rolled to another producer.

CANCELLATIONS

GROUP

COMMISSION SUMMARY STATEMENT

The Summary Statement displays **reporting** month and year-to-date compensation amounts for new business and renewal sales for these categories:

- GROUP COMMISSIONS
- Individual Commissions
- Overrides (If applicable)
- Bonuses (If applicable)

Name: DEMO			
Producer Number: <input type="text"/> PR			
State: Texas			
Commission Summary Statement For Period			
A	HCSC Monthly Commission Earned	B	Statement Totals
C			YTD Commission
Commissions			
	Group Health New Business	\$7,989.99	\$7,989.99
	Group Dental New Business	-\$15.22	-\$15.22
	Group Health Retention	\$41,506.29	\$41,506.29
	Group Dental Retention	\$672.27	\$672.27
	Commissions Group Sub total	\$50,153.33	\$50,153.33
	Individual Health New Business	\$0.00	\$0.00
	Individual Dental New Business	\$0.00	\$0.00
	Individual Health Retention	\$1,017.34	\$1,017.34
	Individual Dental Retention	\$4.16	\$4.16
	Commissions Individual Sub total	\$1,021.50	\$1,021.50
Overrides			
	Group Health New Business	\$146,348.63	\$146,348.63
	Group Dental New Business	\$3,741.44	\$3,741.44
	Group Health Retention	\$388,250.95	\$388,250.95
	Group Dental Retention	\$12,223.70	\$12,223.70
	Overrides Group Sub total	\$550,564.72	\$550,564.72
	Individual Health New Business	\$31,550.52	\$31,550.52
	Individual Dental New Business	\$0.00	\$0.00
	Individual Health Retention	\$111,670.45	\$111,670.45
	Individual Dental Retention	\$0.00	\$0.00
	Overrides Individual Sub total	\$143,220.97	\$143,220.97
Bonus:			
	Group Health New Business	\$0.00	\$0.00
	Group Dental New Business	\$0.00	\$0.00
	Group Health Retention	\$0.00	\$0.00
	Group Dental Retention	\$0.00	\$0.00
	Bonus Group Sub total	\$0.00	\$0.00
Compensation Totals:			
	Group Total	\$600,718.05	\$600,718.05
	Individual Total	\$144,242.47	\$144,242.47
	Prior Balance Forward		\$0.00
	Grand Totals	\$744,960.52	\$744,960.52

The following table lists the summary report column names and descriptions.

	Column	Description
A	HCSC Monthly Commission Earned	Commission totals for the reporting payment month for HCSC
A	HISC Monthly Commission Earned	Commission totals for the reporting payment month for HISC.
B	Statement Totals	Commission totals for the reporting payment month.
C	YTD Commissions	Year-to-Date Commission totals for the reporting month's payment year.

GROUP EXTRACT PRODUCER COMMISSION

Client Key	Producer Name	SubProducer Number	Account	Credit Producer Type	Group	Group Subname
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The following table lists the detail report column names and descriptions.

Column	Description
Client Key	Defaulted number from HCSC
Producer Name	Producer #, type, and Producer's name
Sub-Producer Number	Producer/sub-producer number
Account	Account Number
Credit Producer Type	Type of producer
Group	Group number associated with the account
Group Subname	Name associated with the account or policy

Billing Profile	Number of	Payment Type	Effective Date	Paid To Date	Calculate Method	Split Percentage	Premium Collected	Commissions Rate	Collection Amount	Premium CTD
0000000000	20	P	2017-01-01	2017-06-30	% Prem Collected	100.00	250,000.00	0.0000	104,000.00	0.00427149
0000000000	20	P	2017-01-01	2017-06-30	% Prem Collected	100.00	250,000.00	0.0000	104,000.00	0.00427149
0000000000	0	P	2007-01-01	2017-06-30	Subcontract FF	50.00	500,000.00	0.0000	0.0000.00	0.00000000
0000000000	4	P	2007-01-01	2017-06-30	Subcontract LCO	50.00	500,000.00	0.0000	0.0000.00	0.00000000
0000000000	0	P	2007-01-01	2017-06-30	Subcontract FF	50.00	500,000.00	0.0000	0.0000.00	0.00000000
0000000000	1	P	2007-01-01	2017-06-30	Subcontract FF	50.00	500,000.00	0.0000	0.0000.00	0.00000000

Column	Description
Billing Profile	Billing number associated with account
Number of Contracts	Number of contracts for the account number and product type (i.e., HMO, Dental, Non-HMO) Note: Will be blank in case of Individual
Payment Type	Type of payment
Effective Date	The date the group first became effective
Paid To Date	Premium Paid To date
Calculate Method	Method used to calculate the commissions or overrides for the account or policy. Possible methods: <ul style="list-style-type: none"> • \$/Contract • Flat Monthly • % Premium • % Stop Loss • % Paid Claims
Split Percentage	The split % for this producer
Premium Collected	Compensated Premium for this current statement

Commissions Rate	Collection Amount	Premium CTD	Commission CTD	Commissions YTD	Section 1	Month Policy	Cancel	Product Name
0.0000	000,000.00	0.00427149	0.00427149	0.00427149	0000	010	FFCO	
0.0000	000,000.00	0.00427149	0.00427149	0.00427149	0000	010	FFCO	
0.0000	000,000.00	0.00000000	0.00000000	0.00000000	0000	100	FFCO	
0.0000	000,000.00	0.00000000	0.00000000	0.00000000	0000	100	FFCO	
0.0000	000,000.00	0.00000000	0.00000000	0.00000000	0000	100	FFCO	

Column	Description
Commissions Rate	Commission Rate for Producers or Override Rate for General Agents.
Collection Amount	Commission Amount for Producers or Override Amount for General Agents.
Premium CTD	Current to Date Premium totals for the current payment year.
Commission CTD	Current to Date Commission totals for the current payment year.
Commissions YTD	Year to Date Commission totals for the current payment year.
Section 1	Section number associated with the account
Month Policy	Number of Months this policy/account has been active
Cancel	The date the group was cancelled
Product Name	Short form of Product Name, such as HMO

INDIVIDUAL EXTRACT PRODUCER COMMISSION

Client Key	Calc Method	Credit Producer Type	Producer Name	Line of Business	Group	Contracts/ Members	Subscriber	Group Subname	Payment Type	Collection Amount
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Column	Description
Client Key	Defaulted number from HCSC
Calc Method	Method used to calculate the commissions or overrides for the account or policy. Possible methods: <ul style="list-style-type: none"> • Zero Comm • Flat Annual • % Premium • \$/Member
Credit Producer Type	Type of producer
Producer Name	Producer #, Type, Name
Line of Business	Type of Policy H = Health D = Dental
Group	Group number associated with the account or policy
Contracts/Members	# of Contracts/Members the policy was paid on
Subscriber	Policy Number
Group Subname	Name associated with the policy
Payment Type	Type of payment
Collection Amount	Premium amount for Producers or Admin Fee/Override Amount for General Agents.

Paid To Date	Effective Date	Month Policy	Product	Split Indicator	Split Percentage	Commission Rate	Commission Paid	Service Rate	Service Fee	SubProducer Number
20163201	20140101	025	PD2	N	501.00	000.039.50	0.0000	000.000.00	000.000.00	000606348
20163201	20140101	025	PD2	N	501.00	000.039.50	0.0000	000.000.00	000.000.00	000606348
20163201	20140101	025	PD2	N	501.00	000.039.50	0.0000	000.000.00	000.000.00	000606348
20163201	20140101	025	PD2	N	501.00	000.039.50	0.0000	000.000.00	000.000.00	000606348

Column	Description
Paid to Date	Premium Paid To date
Effective Date	The date the group or policy first became effective <ul style="list-style-type: none"> • Health - Original Effective date • Dental - The effective date the individual added Dental.
Month Policy	Number of Months this policy/account has been active
Product	Short form of Product Name, such as PD2
Split Indicator	The split for this producer
Split Percentage	The split % for this producer
Commissions Rate	Commission Rate for Producers or Override Rate for General Agents.
Commission Paid	Commission Amount for Producers or Override Amount for General Agents.
Service Rate	Rate equals zero
SubProducer Number	Producer's number

FREQUENTLY ASKED QUESTIONS

1. What is SAP Sales Cloud Reporting Tool?

SAP Sales Cloud Reporting is the cloud reporting component of a larger software system that your Blue Cross Blue Shield plan uses to manage commissions data and serves to deliver information via the Web, keeping you informed of your Blue Cross and Blue Shield business.

How do I access Blue Access for Producers (BAP)

Visit the state specific webpage

- www.bcbsil.com
- www.bcbsmt.com
- www.bcbsnm.com
- www.bcbsok.com
- www.bcbstx.com

Select **Producer** tab on the top of the webpage

- if you have never logged in before, click “**Register Now**” and input requested info which will automatically e-mail a temporary password.

2. How do I obtain a log in for Blue Access for Producers (BAP)

Once you have your producer number or agency appointed ID, visit the appropriate BCBS of your state, and register as a first-time user.

Note: *User is 9-Digit Producer Number or agency assigned I.D.

If you cannot log in to BAP call Help Desk 1-888-706-0583.

3. Blue Access® for Producers is displaying a log out page. What should I do?

This means your Blue Access session has ended. To re-enter Blue Access, return to the Login Page and re-enter your ID and password. It is possible for your SAP Sales Cloud reporting tool window to remain active even though your Blue Access session has ended.

4. I cannot view my Commission Statement on line?

Contact the Producer Service Center to verify a Commission Statement has been generated 855-782-4272.

If you cannot log into BAP call the Help Desk 1-888-706-0583.

5. I have commissions from multiple HCSC Blue Cross and Blue Shield plans. Are my statements combined?

Each local Blue Cross and Blue Shield plan operated by HCSC will provide you with a separate commission statement. To view separate statements, log into each plan's respective Blue Access for Producers portal.

6. What is the last day of the month that an EFT (Electronic Funds Transfer) change can be submitted and reflect on my commission statement?

EFTs must be submitted no later than the last business day of the preceding month. EFT may take up to three business cycles to become effective.

7. How can I get a copy of my commission statement?

Commission statements are available online using the Blue Access for Producers (BAP). Commission statements are no longer mailed, emailed or faxed.

8. Who should I call if I have problems viewing or downloading my statement?

For technical assistance with viewing or downloading commission statements, please call the Internet Help Desk at 1-888-706-0583.

9. Who should I call when I have commission statement business questions?

For questions about the content within your commission statements, e.g. a dollar amount or an account status, please contact your local Blue Cross and Blue Shield Producer Service Center at (855) 782-4272.